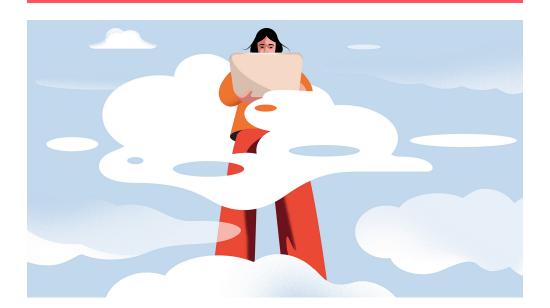


Leadership & Managing People



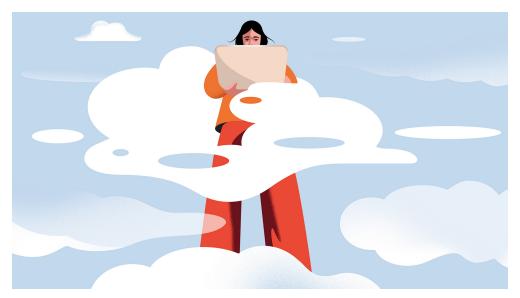
## The Future of Flexibility at Work

You can tailor programs and policies to fit your employees' needs. **by Ellen Ernst Kossek, Patricia Gettings, and Kaumudi Misra** 

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As organizations tentatively plan how to get work done amid the uncertainty of the coronavirus, both leaders and employees are touting the benefits of flexibility. But what does flexibility at work look like in practice? And how can you know whether your team or organization is using it successfully?

We are researchers who study how organizations of all types — from professional services and IT firms to hospitals, retail stores, and

manufacturing facilities — manage flexibility. Over the course of our work we have asked leaders to tell us how they do so (or not). Here is a range of typical responses:

I accommodate employee needs for time to go to the gym during lunch or take a class by allowing a special arrangement with respect to the work schedule.

If a family member is ill or someone has been in a car accident, it's no issue to leave work.

Because of the way that the units are staffed and scheduled, there doesn't seem to be a whole lot of flexibility.

I often resorted to mandatory Zoom meetings on Friday nights at 6 PM, because that was the only calendar opening for key staff members.

We can't get enough staff on the weekends to run the production we need to run — even with eight different schedule options. That's not a good thing. I don't want that to be the reason we can't produce.

These responses may sound familiar. The variation among them is notable. The first focuses on special arrangements for nonwork activities. The second is contingent on dire circumstances. The third expresses frustration about the barriers to flexibility. The fourth is flexibility at its worst. The last shows that flexible scheduling is a critical (yet unsolved) competitive issue for many organizations.

This variation reflects the fact that the word "flexibility" is vague; its implementation can differ from organization to organization, department to department, and even within teams. It's no wonder that managers struggle with how to let employees work when and where

they do so best. Even companies that were early leaders in piloting extensive flexible working — such as IBM and Bank of America — began pulling back on those arrangements several years ago, because they felt their businesses weren't benefiting.

Yet coming out of the pandemic, a growing number of companies have announced that they plan to "embrace flexibility," particularly in a hybrid working model. This is for three key reasons: First, businesses believe that the 24/7 remote-work form of flexibility can be leveraged to support productivity. Second, employees — especially Millennials — are threatening to quit unless they're granted flexibility. Third, some leaders assume that when employees are permitted to work flexibly, they automatically experience more harmony in their work-life balance.

But these rationales oversimplify the challenge in making flexibility core to an organization's strategy and operations. As a result, most companies approach the task superficially. In reality, expanding flexible work arrangements entails more than sharing online tool kits, surveying workers' preferences, purchasing self-scheduling software, or hiring consultants to become more "phygital" (physical plus digital). Despite all the hype about flexibility's work-life benefits, studies consistently show that companies are better at creating flexible work options than at enabling the use of them. Leaders leave that to the benefits department or payroll consultants.

Employers also have strong biases regarding the types of flexibility. Research shows that if leaders believe that employees are telecommuting to increase productivity, such as by working long hours to meet job demands, then career benefits are likely to ensue. Those benefits are far less prevalent when individuals use flexibility for family or personal reasons. Evidence indicates that when women use flexibility more than men do, they face lower pay, stalled careers, and backlash.

Our worry is that these patterns will recur as organizations plow ahead with flexibility on a much larger scale. But there is a better way. In this article we provide insights on why traditional flexible working practices have not lived up to their potential. We also offer a path forward with what we call *true flexibility* — a strategy that aligns the interests of employers and employees and thus benefits both groups.

### **Traditional Approaches**

Leaders have typically managed flexibility in one of two ways: as an *accommodation* around individual work-life events such as illness or childcare, which companies use to attract and retain employees; or as *boundaryless working*, which many leaders used to transition their organizations to widespread remote work during Covid-19. In the second case, employees are expected, explicitly or implicitly, to be available 24/7 to perform their jobs. Whereas accommodation largely offers flexibility for the individual, boundaryless working offers flexibility for the company. Neither is inherently bad, but both can have unintended consequences, particularly when used in isolation.

**Accommodation.** This approach is understood as a supervisor's one-off response to an employee's request for more flexibility in a schedule, place of work, time off, or workload to support personal or family needs. Such idiosyncratic, case-by-case approvals sometimes mirror parentchild dynamics, with the manager granting "permission" to the employee — whether it's "exceptional flex," as in the hypothetical car accident mentioned above, or a special reward to help retain a high performer.

Benefits can be derived from addressing unique worker needs, but that kind of flexibility may come at a cost if it creates two classes of employees: those who work "nontraditional" schedules and those who

work "regular" hours. The latter rarely ask for flexibility but may well want more of it.

Further, many employers have trouble deciding — or are ambivalent about — whether and how to sustain flexible working accommodations, which are rarely implemented in ways that support cultural consistency or career advancement. In organizations where managers are the gatekeepers of flexibility (most often the case), employee access can be very uneven, with accommodation dependent on who one's boss is rather than on the quality of one's work or the equitable support of nonwork needs.

If work flexibility is viewed as an exceptional accommodation, it can also affect customers and clients. In one large North American study, a manager who had supported implementing flexible work commented, "Some clients are more (or less) empathetic than others....You know: 'I'm not paying [the company] to help your people have a nice workload. I need our work done."

Finally, we know that women — especially working mothers and caregivers — have historically been the primary seekers of accommodation and have faced pay and career discrimination as a result. Although a smaller number of men seek similar arrangements and may also face discrimination, they are more likely to advance in their careers. Work-life flexibility has long been gender-siloed, seen as a "women's issue," with women bearing the brunt of its effects on career and pay across occupations. This was especially true during the pandemic. For example, the publishing output and productivity of talented STEM professional women decreased dramatically while women handled most of the childcare, eldercare, and schooling.



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**Boundaryless working.** We find that as a company becomes more comfortable with allowing and managing flexibility, leaders tend to move to a boundaryless approach, whereby employees work anywhere, anytime. Typically companies initiate this to enhance productivity and enable their businesses to operate efficiently around the clock while saving money. In the 1990s many companies, including IBM, Deloitte, and PwC, experimented with this approach, dispersing a mobile workforce globally across home office and customer locations. Leaders learned how to manage performance by relying more on outcome metrics than on face time.

This results-oriented, employer-driven flexibility does indeed yield bottom-line benefits. Studies show that teleworking professionals who are conscientious and highly identified with their jobs are motivated to work long hours, especially in the absence of commutes and watercooler chitchat. And the costs saved from reducing office space are a plus for employers. Yet boundaryless work can hurt employers in the long run,

even if they don't realize it. Companies' talent pools may suffer. For example, recent news <u>reports</u> indicate that despite highly lucrative pay, investment banking jobs are now less popular with young professionals because of the long hours, lack of work-life balance, and work-anytime culture.

And although telework provides some benefits to employees, such as a shorter (or no) commute and the ability to integrate home tasks, the evidence suggests a lot of downsides when it is boundaryless 24/7. Boundaryless flexibility increasingly "passes the buck" by shifting the burden of matching customers' schedule demands onto workers, depleting personal time, and — for teleworkers — transferring workspace and tech support costs as well. Employees are at greater risk for layoffs, lower ratings, and lower pay because they are less socially connected to colleagues. The work-without-boundaries approach may also increase isolation, symptoms of depression, overwork, and job creep into nonwork space and time.

What happens at home matters to the success of boundaryless working. Early studies that reported better work-life balance under its conditions typically held domestic and work hours constant, which may have hidden the gender effects. As recent reviews suggest, an employee (often a woman) who is teleworking is more likely to take on even more family demands and report greater work-life conflict.

This increase in work-nonwork multitasking while teleworking has become visible during the Covid-19 crisis, culminating in a global "shecession." Even for dual-career couples, traditional gender roles persisted at home, aggravated by pandemic disruptions. A national study of woman scientists found that although their mostly male partners also worked remotely during the pandemic, the women ended up doing 90% of the domestic labor. Fathers were unable or unwilling to

help, so working women managed virtual schooling, childcare, pets, cooking, and cleaning, and experienced higher work-family conflict and overload. This exacerbated the gender gap, which, the World Economic Forum notes, has increased by more than an entire generation's worth: It will now take 135.6 years for women to reach parity with men, rather than 99.5. Gendered inequality will continue in the post-pandemic workplace unless organizations change their approach.

So, is hybrid the magic flexibility pill?

As companies move to implement a post-pandemic hybrid flexibility a largely employer-determined mix of remote and office work schedules, incorporating a blend of unique accommodations and widespread boundaryless work with little or no structure — employees' well-being and careers could actually suffer harm. We believe that women and those with health or family-care needs would be the most disadvantaged. That's because the majority of these arrangements won't effectively empower employees to align job and nonwork demands by controlling when and where they work. Our fear is that companies may end up offering *inflexible* flexibility, whereby employees have little choice about schedules and which days they may work remotely. At the other extreme, flexibility will be implemented without structures or norms, resulting in a "program" that is disorganized, scattershot, and reactive to work requirements. Expectations about where and when one should work may shift without warning, as work seeps into off-hours and employees struggle to live predictable nonwork lives.

*True* flexibility will require truly new thinking.

#### A Better Way

True flexibility aligns employers and employees to achieve mutual gain in meeting both performance and work-life needs: It is a means to compete in the market over the long term, and it gives employees a say and some choice in how flexibility is implemented on their teams and in their organizations.

This is both a top-down and a bottom-up process. Leaders listen, set goals, and provide resources to make flexibility possible. Employees choose flexible working that suits their needs while communicating with their managers and colleagues to ensure that team, client, and customer requirements are met. In other words, the company provides the scaffolding — flexibility options, equipment, and supportive performance-management systems — and individual employees and teams decide how to organize their work within it.

With this approach, employers benefit by retaining a globally diverse, sustainable workforce. Employees experience well-being, enjoy respectful team processes, and avoid burnout and health problems. But it requires moving away from old narratives and enhancing employee support and trust. To do that, leaders must first assess their current culture. How do they define flexibility? Has the company leaned more toward accommodation, boundarylessness, or a combination? What policies has it embraced, and for which jobs? Then they can assess which true flexibility principles should be further embraced. We detail those principles here.

**Make flexibility available to all employees.** Every job deserves some flexibility. Even if telework isn't always an option, organizations should offer flexibility to both office and frontline workers. It cannot be viewed as a scarce or privileged resource. Yet all too often that's what happens. Companies ignore the needs of essential and hourly workers, providing flexibility only to knowledge workers on technology-driven teams.

Consider a pharmaceutical company that was part of one of our studies. During a snowstorm, senior directors and managers could work from home, but secretaries were forced to drive on a busy (and icy) freeway to get to the office. Many leaders didn't realize that they had such an unfair policy, because they were accustomed to administrative support in a hierarchical culture. The company gradually expanded its flexibility by experimenting with summer hours: A secretary could partner with a peer to cover each other's Friday workload, enabling them to take every other Friday off.

Flexibility for all workers is indeed possible. As managers learned during the pandemic, a company can schedule hourly work flexibly and in shorter shifts and give paid time off at the last minute without penalty; in fact, those accommodations were necessary to support essential workers during the crisis. We know of an engine manufacturer that, even before Covid-19, regularly scheduled highly cross-trained "floaters" who could rotate jobs and shifts on teams and fill in wherever colleagues need help. That allowed its teams to function well during the pandemic, when workers had to care for children during school closures or take care of other personal needs. McDonald's recently added paid time off and an emergency childcare program to attract mostly hourly workers. Another example comes from a busy metropolitan police department: Officers, including supervisors, were able to use predetermined compressed workweeks to create more-predictable schedules and allow for recovery time.

### Every job deserves some flexibility. It cannot be viewed as a scarce or privileged resource.

Increasing flexibility for frontline workers can help a company better support diversity and inclusion, because immigrants, people of color, and working mothers are heavily represented in service industries. Ultimately, all employees need to be supported in their personal lives. If your flexibility policies exclude a segment of your workforce, you're doing something wrong.

**Prioritize clear structures and policies.** If you were to randomly ask leaders or employees at your company to describe flexibility, they should be able to give a clear answer — and their answers should be consistent. Flexibility policies will not work if they are difficult to understand, if employees or managers don't know how to use them, or if they vary greatly in approach. Organizations benefit when they develop clear written frameworks with principles that can guide decision-making about and expectations for flexibility. These frameworks should be communicated widely.

As an example, here's a brief checklist that draws from the employee assistance program at LifeWorks (formerly Morneau Shepell) and can serve as a starting point for any company's flexible work arrangements:

- Develop a written policy that clearly lays out expectations.
- Communicate with all employees about the possibilities for flexible work and aim to achieve equality.
- Ask employees to document their planned versus actual work hours to foster work routines and increase transparency about when they are working and when they are off.
- Use clear metrics to evaluate employees on the *quality* of their work, not the timing or quantity of it.

Manager checklists like this one are becoming widespread. Consider this example from Canada, where, as in the United Kingdom and Australia, the right to request a flexible schedule is gaining legal ground.

Within these guidelines, the manager's role is to match flexible work processes with customer, product creation, and service demands. Thus leaders must understand how each type of flexibility — schedule, place, continuity, workload, and mode — aligns with the job at hand, their employees, and policies. As the exhibit "A Flexibility Primer" shows, various combinations of flexible arrangements may have bundling synergies. For example, location and schedule flexibility sometimes work well in combination.

### **A Flexibility Primer**

A look at five different types of flexibility your organization can consider and how they might be bundled.

Policy type	Policy examples	Bundling option	Employee benefits	Employer benefits
Schedule Employees can vary their schedules to meet daily, weekly, or monthly expectations.	-Flextime -Compressed workweek -Shift-swapping -Self-scheduling	Schedule Place Continuity Workload Mode	More control over days or hours worked     Less time commuting     Greater ability to meet nonwork needs during regular work hours     Greater feeling of control	•Greater productivity and employee focus •Less absenteeism •Less overtime
Place Employees can work away from their employer's work site using technology or other types of communication.	Telework (using technology to work from any location)     Remote work (living outside the geographic area of the employer)     Telecommuting (working from home)     Hoteling/satellite offices	Schedule Place Continuity Workload Mode	-Less time commuting locally -Less exhaustion from global or national trips -Freedom to live closer to family or friends	·Less turnover ·Lower overhead costs ·Larger talent pool
Continuity Employees can choose when to take time off without losing their jobs.	·Leaves (family, sick, maternity, paternity, education, military)	Schedule Place Continuity Workload Mode	Time to give birth, care for a child or parent, attend school, serve in the military, or recover from illness Ability to return to work sooner when combined with job sharing or part-time work Less burnout Time to nurse or bond with a child	·Less turnover ·Retention of quality employees
Workload Employees can opt for a less-than-full-time schedule in return for a commensurate cut in pay.	·Job share ·Part-time work ·Lighter workload	Schedule Place Continuity Workload Mode	-Less overload or burnout -Decreased work-family conflict	-Less turnover -Retention of quality employees
Mode Employees can vary the degree to which they work off-site.	-Site work -Hybrid -Remote	Schedule Place Continuity Workload Mode	-Ability to coordinate and accomplish work using technology -Ability to mix modes for varying types of work tasks	-Greater productivity -Lower office-space costs

Source: "Flexible work schedules," by E.E. Kossek and J.S. Michel (2009); "A Review of Telework Research," by D.E. Bailey and N.B. Kurland; and "Balanced Flexibility," by E.E. Kossek, R. Thompson, and B. Lautsch (2015).

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The choices made must be viewed as fair by both leaders and employees. Studies show that when they are, workers who experience work-family conflict nonetheless remain committed to their organizations.

How can managers cultivate this kind of environment and roll out flexible policies fairly? One way is to develop a <u>team charter</u>, as the financial services firm Northern Trust did for units migrating to a flexible work mode. Questions that leaders, team members, and other stakeholders might discuss include:

- How has the company decided to manage <u>location-based pay equity?</u>
   For example, will all fully remote workers who perform the same jobs, regardless of whether they live in Tulsa or Los Angeles, receive the same base and merit pay?
- What are fair criteria for how the team sets core hours say, from 10 to 3 when members will be available for collaboration, meetings, and communication?
- What is an equitable way to set limits on employees' availability, and what are norms for respecting time off?

Although clear policies and consistent implementation are important, overly restrictive policies are not the answer. Processes should be adaptable.

#### Empower employees to create and manage their own flexibility.

Although leaders must help shape the structures and policies for flexible work, they don't need to have all the answers. Instead they should facilitate conversations with workers to unpack all the ways in which people interpret flexibility — from where one works to the construction of one's work schedule. It may be helpful for managers to give employees a list of considerations to reflect on and address.

- How might my clients' experience be affected by my flexibility? In what ways can any negative impact be mitigated?
- How might my interactions with team members be affected? What actions can I take to ensure strong collaboration and working relationships?
- Do I have, or can I develop, the skills I need for the proposed flexible work arrangement? For example, do I have the self-discipline to manage attention and boundaries for telework or to maintain the energy and focus for a compressed workweek? Have I talked with my manager and clients to ensure that my part-time job is designed and scoped realistically so that I can perform it effectively within my reduced hours?
- Do I have the right work and home resources (tech support, an internet connection, space, family support, a backup work location) to ensure that I can accomplish my job?

Sometimes managers also provide checklists to employees who are using specific types of flexibility. Some examples are the Australian government's tips for working out of the office, Salesforce's guidelines prior to a leave of absence, and Tettra's onboarding tips for remote workers.

The next step is to create organization-wide structures for self-scheduling and shift-swapping to empower employees. Rather than making supervisors pivotal in managing the everyday implementation of flexibility, some industries are setting up employee self-management processes that give workers greater control over their schedules and hours without penalty.

Health care organizations in particular, with their large female workforce, have been early adopters of self-scheduling. In one <u>study</u> of self-scheduling among nurses in five comparable medical and surgical

units, a key component was educating them about self-scheduling and negotiation skills and when to adjust guidelines to meet needs such as determining holiday coverage. Employee satisfaction and retention increased as a result.

Another example comes from Delta, a <u>large nonunionized U.S. airline</u> that employs a "bidding" process whereby employees pick their own shifts using a software program, with choice increasing according to seniority. Workers may swap or give away shifts as long as overtime doesn't increase and health and safety rules are not violated.

In both these examples the role of leaders is to establish guidelines regarding what works and what doesn't in a way that is facilitating but not controlling, ensuring that workers understand their accountability for guaranteeing staffing mandates and, in the case of health care, the quality of patient care. Companies moving to widespread flexible remote-work systems can learn a lot from them.

Remove disincentives for use. Policies that enable employees to take vacation when desired or sick leave when needed — even when that time off is unlimited on paper — are often accompanied by disincentives for using them. (Consider the "unlimited vacation time" that no one actually takes advantage of.) A common barrier is chronic understaffing. In a study we conducted of frontline workers, only one in four employees at a continuously running oil-production company could use available vacation time because of it. As a result, employees suffered burnout. One manager reported being unable to get time off to attend a niece's wedding, even though he was supposed to walk her down the aisle in place of her late father. We also see structural disincentives in health care, where nurses are increasingly unable to use paid vacation and sick time earned, and we have encountered leave

incentive programs in which employees can actually make *more* money by not taking time off.

# Policies that enable employees to take vacation when desired or sick leave when needed are often accompanied by disincentives for using them.

Many organizational cultures disincentivize the use of time-off policies for nonwork needs as well. In one case, a department chair celebrated a male professor for attending a faculty meeting during parental leave, whereas a female colleague, who had just given birth, missed the meeting to nurse the baby and recover. The message to employees was clear: You are rewarded for showing up even when the official policy says you're not supposed to.

Leaders must remove both types of disincentives. One tactic is to publicly recognize top talent who work flexibly and achieve high performance. In one of our studies, a lawyer who was working reduced hours won an Employee of the Year award by discovering a way to save the firm a great deal of money.

We've also seen some companies use flexibility as an incentive to reduce excessive overtime and burnout and increase productivity and cost savings. One pharmaceutical company offered employees workweeks of four 10-hour days with job security in return for a no-overtime-payment agreement. The company saved money *and* saw improved performance as the team became self-managing and supervisors transitioned out of boss roles and became team members themselves. The former supervisors responded positively because they no longer had to manage the overtime needs of the organization, could work just four days a week, and felt more integrated and supported on their teams.

Remember that leadership matters. True flexibility that meets business and personal needs is unlikely to succeed without support from the top. An example comes from GM CEO Mary Barra's post-pandemic call to "work appropriately." "Where the work permits," she said, "employees have the flexibility to work where they can have the greatest impact on achieving our goals....It is up to leaders to focus on the work, not the where, and we will provide the tools and resources needed to make the right decisions to support our teams."

The jury is still out on how successful GM and other firms — such as Google — that take similar approaches will be, but it's encouraging to hear CEOs strategically setting the tone for flexibility by making it the rule rather than the exception. Top leaders can also recognize and reward supervisors who encourage their teams to get the work done without burning out.

Leaders must be careful how they talk about various forms of flexibility. For example, when teleworking is framed as an initiative to improve work-family balance, it often becomes a gendered phenomenon, leading men to assume they can't take advantage of it or to conceal that they're doing it for work-life reasons to avoid being stigmatized. So it's important to communicate examples of increased flexibility's effectiveness for all kinds of workers in all kinds of jobs and at all levels.

Leaders must also explain the organization's commitment to flexibility to outside stakeholders. For example, if a company is practicing flexibility but its clients still expect 24/7 responses, the company's policy simply won't work. One way to address this issue is to bake client expectations into flexible work plans — for example, by staffing key accounts with several employees who can tag-team and then presenting that as a benefit to clients.

Experiment and measure outcomes, including equity. True flexibility is an ongoing process requiring that management be open to experimentation and new ideas. Some arrangements may not work at first and will need to be adjusted. That is normal and an important part of the process; evolution does not equate to failure. For example, Microsoft found that when a large team initially moved to remote work in 2020, employees worked an average of four more hours a week, sent more messages at nonstandard hours, and spent more time in meetings (albeit shorter ones), risking burnout. Leaders soon realized that this pace was unsustainable — for themselves and for employees — and encouraged teams to develop guidelines to ensure both work and nonwork time (clear-cut shifts, daily breaks, and dedicated solo work hours, for example).

At the same time, evidence suggests that gathering data and making changes can pay off. Northern Trust migrated entire job functions and teams to hybrid remote work (with at least one day in the office and at least one day at home) years before the pandemic. It used pre- and post-evaluation tools to assess whether jobs could be done securely and teams could work effectively regardless of location. Migrating, piloting, and evaluating departments one at a time, the company shifted its culture toward more-flexible working by systematically accumulating data confirming its approach while fine-tuning for each work unit. It saved millions of dollars by reducing office space around the world, and employee stress plummeted as a result of fewer commutes.

Consider the impact of flexibility on your global workforce. In interviews at an oil company headquartered in the EU, we found that employees in one of its Asian offices preferred a 3 PM to 12 AM workday. That allowed many workers to pick up their children from school beforehand. It also facilitated communication across time zones and increased employee productivity and engagement. For example, no one

had to get up in the middle of the night for a conference call, since 3 PM in the Asia office was 9 AM at the company's headquarters. Such localized flexibility practices can help maintain equity among employees in different parts of the world so that team members work at mutually convenient times.

To ensure fair access and results as your company experiments, start by taking race and gender into consideration while conducting an audit to see whether heavier users of work-life flexibility have pay equity. There's evidence that inequity can and does occur. For instance, in 2019 the bonuses of senior female employees at the Swiss bank UBS were not restored to previous levels when the women returned from maternity leave. Some of them eventually resigned. Another example comes from Nike, which cut pay for star athletes who went on maternity leave. (After a backlash, the company adjusted that policy to avoid penalizing mothers.)

We also caution against establishing a policy that offers employees the option of remote work only if they take a pay cut, or creating a pay structure that's based on location. Talent is talent, and compensation shouldn't depend on where employees are unless their location is vital for the people they're serving (say, in government) or required by licensing rules (say, in law). Such policies are also likely to make the shecession even worse and increase the gender pay gap, because women are 50% more likely than men to apply for remote work. They also use flexibility more often, take on more school and childcare logistical management during the workday, and are more likely to be the trailing spouse when couples coordinate dual careers, thus trading geographical location for remote work.

**Finally, remember that implementing flexibility involves a learning curve.** The leader's role is to make performance expectations clear and

resources to support flexibility and performance consistent across people and teams. If someone is falling short, put that person on a performance-improvement plan and assess whether skills, motivation, or some other issue is getting in the way. Don't assume that flexibility is the main reason that work isn't getting done.

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The pandemic has led many employees to rethink the importance of work in their lives and to change their relationship to it. Many are demanding more flexibility. In response, leaders need to stop viewing flexibility as an HR policy and regard it as an opportunity for organizational transformation that will benefit both their employees and their businesses.



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