



STEPS TO FLEX

Employer guide to getting
flexible working right

7 steps to flex

If you're searching for the secret of flex success that truly unlocks benefits for your people and organisation, this is it.

It doesn't matter if your organisation is just starting its flex journey, or you're ready to iron out those final niggles, our top seven steps to flex will help you create a great flexible working culture.

We've compiled the steps based on our hands-on work with Scottish employers over the last decade, and the key is that you have to follow **all** the steps for flex to work as it should. What we tend to find, including in this latest research cohort, is that lots of employers are brilliant at some of the steps but not all of them. Cue niggles, challenges and frustration. We hope that by setting out our steps here, you can see the big picture including what you're doing well and where you might need to focus attention next.



Step 1

Senior leadership buy-in

Employer challenge:

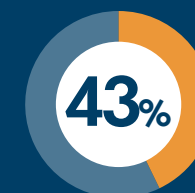
The most common challenge to greater flex raised by Scottish employers in our latest research cohort was opposition to flex from senior managers.

Why does this matter?

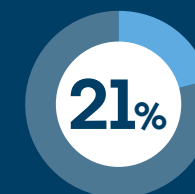
Trying to create greater flex without buy-in – and visible support from – senior leaders is extremely hard to say the least. Getting senior leaders on board is the foundation stone for successful flex, and is our first point for good reason. If you want to create more flex in your organisation, start by talking to your board and senior managers.

And if you're a senior leader already bought-in to flex, there's still work for you in persuading other senior peers of the benefits of greater flex, and in role modelling how you work flexibly to show all workers what sorts of things are 'acceptable'.

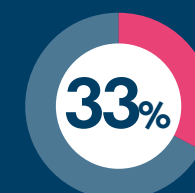
Opposition from senior managers makes it hard to make changes



Agree



Neither agree nor disagree



Disagree

How to get it right



Create a compelling business case that everyone buys into

Flexible working isn't just 'doing what workers want'. It needs to balance against business needs. At the very least, flex should have no negative impact on business operations. But the reality is that flex usually delivers benefits for businesses as well as for people. We've got some great data in this report you're welcome to use to start your own business case for greater flex in your organisation.

Add evidence from your workplace too. What do your workers think? If some people already work flexibly, are they more positive? What do staff surveys and exit interviews tell you? Next, think about what your key organisational challenges are. Do you have a high sickness and absence rate? Do you have staff shortages, or 'hard to fill' vacancies? Would you like more diversity in senior roles? Could flex help address some of these? Gather all your data in one place, and share it widely.



Find out what competitors are doing

This could form another element of your business case. If you know competitors offer more flexible ways of working, your organisation is at risk of losing good staff (remember 85% of Scottish workers already work flexibly or would like to).

You can audit information on company websites about how they work, talk to partners and your networks for their insights, and check out websites such as Glassdoor for honest feedback on how other companies operate.



Role model flexible working from the top

When your senior managers ARE on board, you can pat yourselves on the back. But you're not finished. Having senior managers role model flexible working is a powerful way of showing all workers what sorts of things are acceptable. For example, if a senior manager leaves early to see their child in a school show, he or she should make this obvious in their diary and by saying goodbye as they leave. The same applies if they work hybrid, part time, or any other type of flex. If you're a senior manager yourself, encourage others to take the flexibility they might need at times, creating an environment where people feel safe to speak up.

Step 2

Communication and feedback

Employer challenge:

Some employers are worried that discussions about flex will raise expectations among workers they can't fulfil, and – we assume – these employers avoid exploring ideas with workers. But our data also shows employers are overly optimistic in assuming workers will ask for flex themselves.

Employers are worried asking staff about flex will raise expectations they can't fulfil.

39%

Workers that say they never get asked what they think of flexible working.

25%

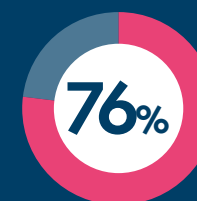
Who is comfortable asking for flex?



of all workers



of workers who don't currently work flex



of employers say staff are comfortable asking for flex

Why does this matter?

Communication is a two-way street when it comes to flexible working. Of course, employers need to explain what's allowed or encouraged, and what's not. But equally important is seeking feedback from workers on what changes might be possible – and would make the biggest difference. We know employers have concerns about asking staff for their opinions and ideas. Our data suggests employers do need to handle this carefully,

half of workers say that if their employer asked for their opinions on flex, they'd expect to get the flex they suggested. But before you panic, we'll add three quick points based on our many conversations with workers:

1. Workers are usually very realistic about what they ask for.
2. Most people ask for small changes, such as being able to start and finish slightly later, or to shift their hours around so they can attend a personal appointment without using leave.
3. People know their jobs best and if you're serious about being a flexible employer, you'll need their insight.

If flex feels like a taboo subject, the risk for employers is that workers are less happy and engaged, aren't able to produce their best work and potentially look for the flex they want (but are too scared to ask for) elsewhere.

How to get it right



Gather feedback from workers (without raising expectations you can't fulfil)

Workers can have brilliant ideas on how working patterns can be better and more efficient. They can also explain what sorts of changes would make the biggest difference to their lives. Most people only want relatively small amounts of flex, which some employers overlook, so talking to your staff could reveal some much easier wins for everyone.

To help you manage the conversation:

- Carry out a listening exercise, which could be an all-staff survey and/or focus groups. Or task line managers to discuss ways of working with their team, which is a much more informal route than a company-wide consultation.
- Frame the conversation. Make it clear you're exploring possible options but you're not able to make any promises.

- Explain what the process will be, what you will do with their comments and suggestions, and let people know when you will report back and update on any next steps.
- Remember, you can and should trial new ways of working for a fixed period to see how it works in practice. You don't need to commit to permanent change straight away.



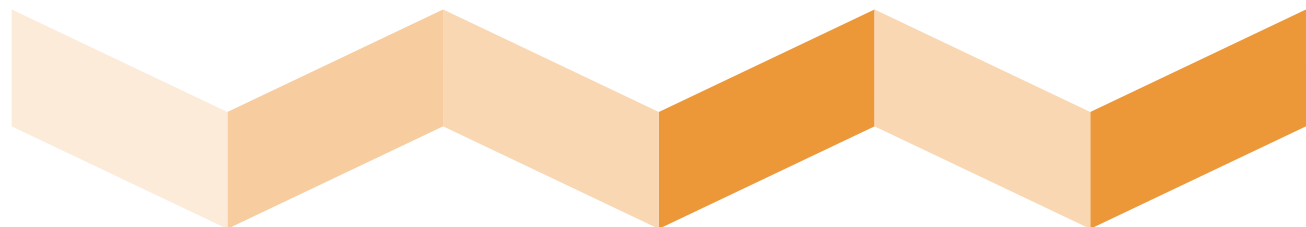
Communicate clearly what's available and what's not

You might have a fantastic offer on paper around flexible working. But it's no use unless people know about it. You can cascade information on what flex is available, and give guidance on what's not, via organisation-wide or team meetings and 1-1s. You can also use your intranet to draw attention to flexible ways of working, or showcase examples of staff already working flexibly via internal blogs and newsletters. You might get staff networks involved in helping promote flex, or highlight flex during relevant national campaign weeks.



Repeat – keep listening, keep explaining what's available (and what's not)

This isn't a 'one and done' situation. You have to keep on listening to staff, and keep on communicating what sorts of flex are available, and what the company's expectations are around ways of working. If you have an internal comms calendar, flexible working should be included regularly. But the simplest and most effective method is for managers to ask their direct reports how they are in 1-1s, and whether their work pattern is manageable. Discussing work patterns regularly in team meetings is also a good way to check how everyone in the team feels and ensure ways of working meet everyone's needs.



Step 3

Design flex in to all roles including frontline

Employer challenge:

A third of employers don't know how to create flex in frontline roles, and a similar proportion are struggling with how to make flex feel 'fair' across different roles (typically frontline and non-frontline).

Employers say:

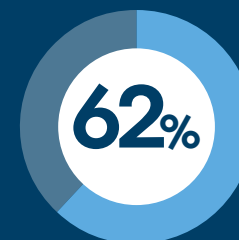
We can't offer flex across all roles and don't know how to make it fair

36%

We don't know how to create flex for frontline workers

33%

Workers without flex who'd like it



of frontline workers



of non-frontline workers

Workers **without flex** who think flex is possible in their role without impacting performance

Frontline

34%

Non-frontline

44%

Workers **with some existing flex** who think more flex is possible without impacting performance

Frontline

68%

Non-frontline

57%

Why does this matter?

Now that hybrid working is becoming more embedded for many desk-workers, employers are increasingly looking for ways to introduce greater choice and control for frontline workers. We know there are often fewer variables in frontline roles. But we'd argue some form of flex is possible in almost every role, and our data shows significant demand for more flex from frontline and non-frontline workers.

How to get it right



Listen to staff

Workers know their jobs better than anyone else. They will know what changes in work pattern are possible, practical and more efficient for the business. And they will know what will make the biggest difference to people's lives. For example, they'd know whether flexible start and finish times or staggered shifts with set start and finish times would work best on a production line.

Given the benefits flexible working can deliver for people and for businesses, it's well worth employers exploring what workers think is possible.



Be open and creative about different kinds of flex

Flexible working can look different in frontline roles. All flex is ultimately about giving workers more choice over when, where and how much they work. So while hybrid might be off the table for good reason, flex for frontline staff could include part time, or having an input to rotas, advanced notice of shifts, or – as one in seven frontline workers told us – being able to swap shifts easily. These are seemingly small changes but they can make a big difference. What's more, our data shows 63% of frontline workers are already working flexibly, proving that flex is possible in many frontline industries. On the next page, we've shared the types of flex that are most commonly used by frontline workers, and what types of flex are still in demand to help employers think about what else you could do.

Top 5 types of flex currently used by frontline workers

Flexible start and finish times

33%

Some working from home or hybrid

28%

Part time

24%

Easy shift swapping

24%

Reliable, predictable shift patterns

16%



Top 10 types of flex frontline workers would like more of in their current role

Flexible start and finish times

25%

Some hybrid/home working

22%

Shorter working week for same pay

20%

Full time remote working

16%

Compressed hours

16%

Part time hours

15%

Easy shift swapping

14%

Opportunity for overtime without pressure to do this

12%

Paid time off to cover personal appointments

9%

Reliable, predictable shift patterns

9%



Flexible start and finish times top the list for frontline workers



Trial new ways of working

Any change of working pattern can be done on a trial basis at first to test whether it works for people and for the organisation. Make sure you communicate clearly with staff on how long the trial period is, what you will be measuring, what information will be shared back with staff, and when that will be.

Step 4

Set clear parameters

Employer challenge:

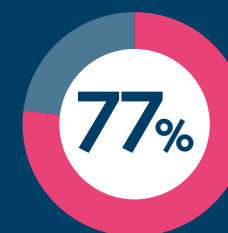
Almost a quarter of employers admit they don't have a framework or guidance for workers on flex, or they're not sure if they have. And nearly half of workers are unaware of any guidance.

Why does this matter?

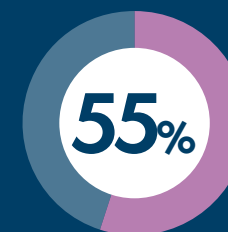
Having a clear framework, or policy, showing what's possible and not possible with flexible working gives everyone more clarity and confidence. Workers feel more confident asking for flexibility if they know it's available and they're entitled to it. While managers feel more confident talking to people in their team about how they can work, and what expectations or red lines exist.

Our data shows a gap between employer and worker perceptions on whether flexible working policies or frameworks exist. This suggests some employers need to create a framework and others need to communicate an existing policy or framework much better.

My organisation has a clear framework, or guidance, showing what's possible and not possible with flexible working



of employers



of workers

How to get it right



Create a framework, policy or guidance

You need to capture clearly, and in one place, what sorts of flexible working are available, including for different types of roles. In addition, your summary should include boundaries. Your policy, framework or guidance document (whatever you choose to call it) should also set out how people can request flexible working, formally or informally. If you have a document already, don't forget, you might need to update it in line with the new flexible working law that's coming into force in April 2024.



Purpose not prescription

We strongly recommend that your framework, policy or guidance is clear but not overly prescriptive. We know that will feel counter-intuitive to some people. But what we find works best is when managers have a broad framework to work within but retain autonomy to make decisions and create solutions that work best for their team. For example, if your organisation works hybrid, you can give guidance on the purpose of office working, such as enhancing team relationships with in-person team meetings, or creating learning opportunities for younger and less experienced staff. But ultimately, it's down to the team and the manager as to when exactly the team works in the office.



Communicate (again)

Yes, this old chestnut. Our data suggests about one in five employers have some kind of policy around flex that workers are unaware of. Getting your policy or framework down is a great starting point but if you don't share what's in it with managers and wider teams, you won't benefit from the clarity and confidence it can bring to your organisation. You could run a training session with your managers and ask them to share the policy with their teams. Or you could hold a 'town hall' meeting for all staff to explain what's in the policy. Or write an article for your intranet. You will need to keep on communicating what's in your policy, so people don't forget.



Step 5

Flex your job adverts

Employer challenge:

More than eight in ten workers have flex or would like it, yet just one in three job adverts say flex is available. This might not feel like a challenge to all employers, but it is certainly a significant opportunity for many.

What's more, a new law on flexible working – the Employment Relations (Flexible Working) Act 2023 comes into force in April 2024, which makes flex more important than ever during recruitment. The new law will make it easier for people to ask for flex, including a legal right to ask for it on 'day one' with a new employer, doing away with the previous need to have been with an employer for 26 weeks first.



**85% of Scottish workers
have or would like
flexible working**



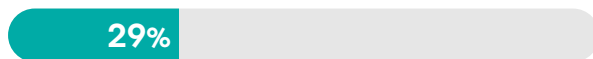
**33% of Scottish job
adverts mention flex**
(according to [Timewise](#))



**Day one right to
request flex**
comes into force in April 2024

How important is flexible working for people currently considering changing jobs?

Scottish workers considering changing jobs



They say the following are important factors in their job search:

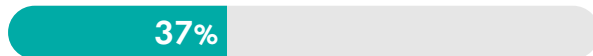
Good work life balance



Pay



Flexible working



62% of mothers considering changing jobs say flex is important.

Important factors for unemployed adults looking for work



Flexible working



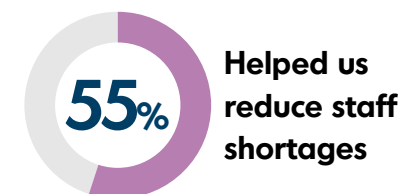
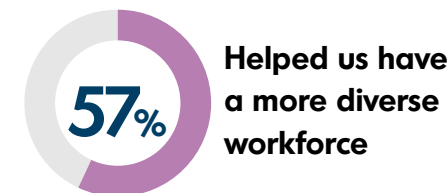
Pay



Don't miss this

76% of unemployed adults looking for work have had to turn down a previous job offer because it lacked flexible working.

Employers say flex has...



Stuck in a rut

Half of workers currently considering changing jobs say they feel 'stuck' in their role because they can't see the flex they need elsewhere to progress.

No flex, no application

Among workers currently thinking of changing jobs, almost one in six (16%) won't apply for a role if flex isn't mentioned in the job advert. This is higher for specific groups:



Our sample sizes are small here. But our data backs up existing research on who is put off applying for roles if flex is not mentioned.

Why does this matter?

Employers that are on the front foot with flex visible in job adverts and ready to talk about flex during interviews, can benefit from reaching and recruiting better quality and more diverse candidates. Employers on the back foot when it comes to flex and recruitment will put some candidates off applying, find themselves unprepared and unsure answering questions during interviews and they will likely find it harder to fill vacancies. While the new flex law giving workers a 'day one' right to flex stops short of requiring employers to specify flex in job adverts, it's less disruptive for employers and more helpful for new recruits to discuss flex before 'day one'.

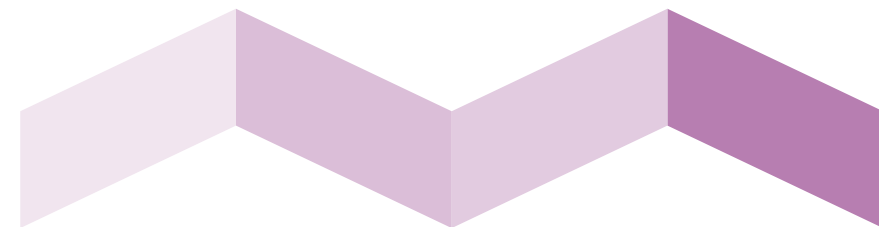


How to get it right



Consider the flex that's possible in roles before you advertise

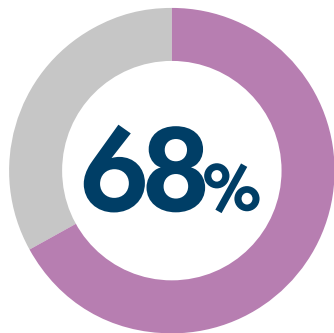
Before you advertise for a new role, think about whether it can be done more flexibly. Is all of the role tied to a set location, or set times? If not, could some tasks be done from home, or carried out at slightly different hours? Would the role work as a job share? Or as a part time role? Etc.





Make flex visible

Make flex clear in job adverts, on your website and on your social media channels. Best practice is to be as specific as possible in job adverts, such as stating the role could be hybrid, or that there is some flex over start and finish times. But at the least, you can add a standard sentence saying you're open to flexible working, which might make the difference in whether someone who needs flex applies for the role or not.



of unemployed adults looking for work say it's been difficult to get information about flexible working for most jobs they've considered



Discuss flex in interview

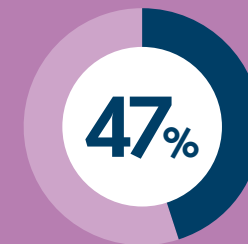
Too many employers think that candidates will simply ask for any flex they need during an interview. But we know lots of workers won't, especially if they're not already working flexibly, they're a woman, have a disability or long-term health condition or they're on a low salary. The business benefit of discussing flex at interview is that you can recruit better and more diverse candidates. By being on the front foot and getting everything agreed in advance, both the employer and new worker can feel more confident about what's expected too.



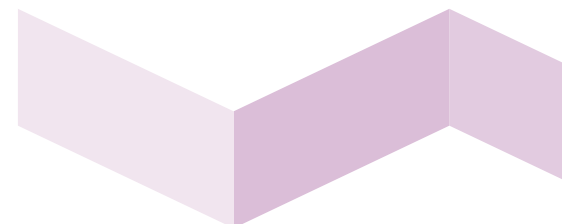
Who's not comfortable asking for flex?



of all workers



of all workers who don't currently work flex

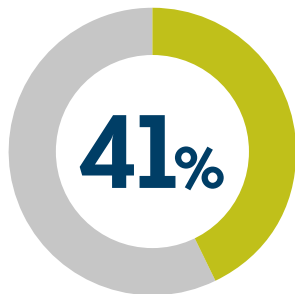


Step 6

Support managers

Employer challenge:

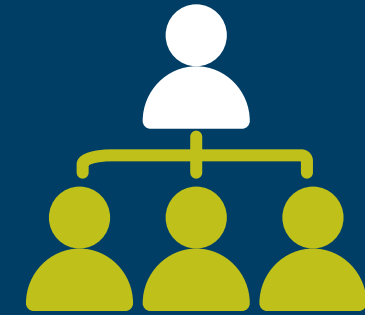
Many employers recognise line managers are dealing with specific challenges around flexible working, or in some cases, that the managers themselves are the challenge. Yet four in ten employers aren't providing any support for their managers to help them manage flexible workers.



of employers don't support managers to manage flexible workers (or don't know if they do)

Why does this matter?

Line managers play a crucial role in how people feel about their job. Whatever your company policies are, it's your line managers who make them a day-to-day reality for your staff and part of your working culture. When it comes to flexible working, we know lots has changed since the pandemic in policy and in practice, and it often falls to line managers to clarify the new guidance and lead by example, as well as managing people who work in different ways, such as remotely.



Employers say...

Line managers who are opposed to flex are holding back flex

37%

Managers are struggling to get people into the office as much as they'd like

33%

Managers are struggling to have conversations with workers about flex

30%

But as our research shows, if you're not training and supporting your managers, then on a practical level they might not know how to create the right balance of in-person and remote work for the whole team, or put together a rota that takes people's preferences into account. Likewise, if they've never seen the business case for flex, they might not understand how flex is good for business as well as people.

How to get it right



Get your managers on board with flex

More than a third of employers say resistance to flex from line managers is holding them back from creating greater flex across the organisation. Help your managers understand the benefits of flex by sharing your business case on why flex is good for people and your organisation. Make sure they know flex isn't just for parents and that all kinds of people want or need flex for all kinds of reasons.



Practical support and training

For flexible working to be a success, managers need to be confident in many tasks. These include knowing how best to communicate and motivate teams that are not always together in person at the same time, how to proactively begin conversations about work life balance, how to set clear objectives, which is crucial for assessing performance, and how to have conversations when performance or behaviours are not acceptable. Also being creative and proactive when it comes to flex and job design and recruitment. These ways of working aren't instinctive to everyone, and many managers need support and training to help them see the possibilities and feel confident in discussing them with their teams.

Offering training and support for managers pays dividends for your organisation, especially in terms of retaining good workers. For example, if a manager suggests two part time workers apply for a promotion as a job share, this could retain two skilled and experienced

members of staff and bring two minds and perspectives to the more senior role. Remember we know lots of people (especially women) don't feel comfortable asking for flex, so proactive, supportive managers can help you keep great people and create a more diverse workforce.



Provide managers with easy-to-use guidance and checklists

Alongside formal training, managers benefit from having clear written guides and checklists to help them with day-to-day tasks. For example, you might create a template for 1-1s, which includes wellbeing questions and asking about working patterns. Or you might create a checklist for managers discussing flexible working and dealing with requests from their team. Or, you might create a guidance document on how managers can have a supportive conversation with someone who doesn't want to come into the office.

Step 7

Measure the impact of flex

Employer challenge:

Employers rightly want to review and update guidance on how people can work. But not enough are recording and analysing what's happening in their workplace in order to make informed decisions.

Why does this matter?

Let's not forget, the pandemic was the biggest shakeup of working patterns in over a century and despite how long ago lockdown feels, we're still in the early 'test and learn' phase of our new ways of working. It makes sense to monitor and assess changes to find evidence of what works, and also what doesn't.

But our data shows the majority of employers are not recording and analysing what's happening. This means if some senior managers feel workers should be back in the office full time, there's no hard data on where people are actually working, and no one has cross checked this with organisational KPIs to see if targets are still being met, whether sickness absence has reduced, or what staff think about it. There's no evidence on which to make an informed decision.



7 in 10

employers are not recording who's working flexibly



6 in 10

employers are not monitoring progression for flexible workers

In addition, employers have a duty to ensure they don't create new inequalities for staff. For example, we know part time workers are less likely to be promoted than full time colleagues, and now that many more people are working flexibly there's a legitimate concern we may inadvertently create a two-tier workforce with people who can work full time and on-site doing well, getting great experience and promotions, and those who work differently not able to progress. If you don't monitor this, you won't know.

How to get it right



Agree how you will evaluate flex and create a flex scorecard

Discuss internally what you want to monitor. We recommend creating a 'flex scorecard' covering three key areas. The first is business metrics, such as productivity, financial indicators and customer feedback. The second is staff satisfaction and wellbeing, which includes insights from staff surveys and exit interviews. The third is workforce measures, such as absenteeism rates, retention and demographics on who is working flexibly.



Ensure you have the tools and systems in place to measure impact

Once you know what you want to monitor, you'll need to make sure you are able to record and share the data. Does your HR system automatically capture some of your data? Do you need to create a staff survey, or run one more regularly? Do you need to create a report or dashboard to share the data in an easy-to-understand format? How will you circulate this?



Analyse the data and use it to make informed decisions

Has a switch to a new hybrid model affected KPIs or staff satisfaction? Is recruitment more effective if you mention flexible working? Make sure you analyse the data you've captured so you can make evidence-based decisions.

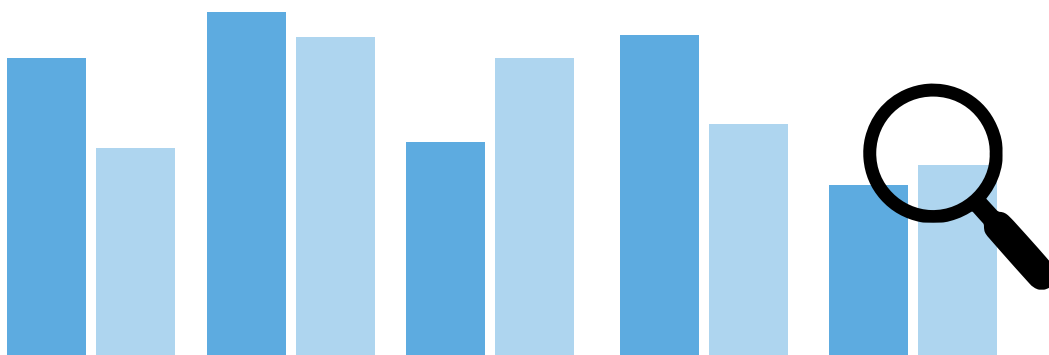
About our data

All figures, unless stated otherwise, were commissioned by Flexibility Works in the form of online surveys carried out by global research firm Panelbase between 6/11/23 and 20/11/23.

- **1016 Scottish workers** were surveyed, of whom 618 were 'frontline/on-site/customer-facing' workers, and 398 were not frontline workers. Our figures are representative across age, gender, industries, income, and those with children including single parent households.
- **262 Scottish employers** were surveyed, including CEOs, directors, owners and founders, senior HR professionals and senior managers. A total of 237 had at least some 'frontline/on-site/customer-facing' workers and 24 did not. The industries and sectors our employers came from closely matched our employee survey.
- **216 unemployed Scottish adults** who are looking for work were surveyed.

Our thanks go to Aaliyah Evans and Dr Joanna Wilson from the Q-Step Centre at **Manchester Metropolitan University** for additional data analysis.

We're happy to discuss our data and if you need more information, such as sample sizes for specific questions, please contact us via hello@flexibilityworks.org



Contact us on:

T: 0141 378 8330

E: hello@flexibilityworks.org

W: www.flexibilityworks.org



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