

# MANAGER DISCUSSION GUIDE: MEETING OUTLINES

## Manager Discussion Guide: Meeting Outlines

### *Flexibility Team Meeting Discussion Topics*

*Each topic or segment can be covered in a 60–90 minute meeting.*

#### **I – Flexibility as a tool to meet employee needs and business requirements:**

- Business requirements and metrics
- Current and desired use of flexibility
- Ideas for more flexible ways of working

#### **II – Flexibility challenges and success factors:**

- Viable flexible work options in workgroup
- Potential challenges
- Critical success factors

#### **III – Establishing a flexibility plan for the team:**

- Ensuring staffing and coverage requirements
- Maintaining high performance
- Establishing team agreements and operating principles

### *Meeting One – Flexibility as a Tool To Meet Employee Needs and Business Requirements*

- **Explain** your objective for these flexibility discussions with the workgroup.
  - **Reiterate** the overall business strategy, goals and the output and/or performance metrics from this workgroup that are required to meet the company’s business objectives.
  - **Describe** positive impacts of flexible ways of working for the business and your team based on the business impact of current flexible work arrangements and other potential flexible work options.
  - **Ask** team members for their view of how flexible work arrangements benefit the business and their ability to meet team work requirements. Record on a flip chart.
- **Review** the company’s flexibility policy and approach and the flexible work options that are applicable to your workgroup (if they exist).
  - **Describe** the current flexible work options that are in place and being used by team members, both formal flexible work arrangements and occasional use of flexibility.
    - **Ask** how these flexibility options are working to meet individual and business needs — facilitate discussion.

- **Ask** team members to identify other ideas they have for flexible ways of working that would meet their needs as well as the needs of the business.
  - **Be creative** and think “out of the box.” Record ideas on a flip chart.
- **Ask** team members to narrow down their preferences from the potential flexibility options to the ones that are most viable given the nature of the work and business requirements (if necessary).
- **Agree** to consideration of the preferred and most viable flexible work options and set a time for the next meeting.

*Note: Manager may want to review the preferred and suggested flexible work options and be prepared to recommend the options that are realistic and viable given the team’s business requirements, schedule and needs for coverage.*

## Meeting Two — Flexibility Challenges and Success Factors

- **Open** the meeting with a brief review of the discussion and agreements from the previous meeting.
- **Describe** the preferred flexible work options identified by the team and what you consider the most viable options given business requirements of the workgroup.
  - **Explain** your rationale and answer questions as necessary.
  - **Discuss** how these flexible work options might work given the team schedule, work requirements and coverage needs.
- **Identify** potential challenges and concerns.
  - **Ask** team members what concerns they have and challenges they see in using these options for more flexible ways of working and meeting business requirements. Record on a flip chart.
  - **Engage** team members in a discussion of how they might overcome these challenges and concerns to ensure coverage and meet business needs.
  - **Encourage** honest input and discussion.
- **Identify** critical success factors to ensure the success of working flexibly (both on-site and off-site) and meeting business needs.
  - **Ask** for concrete ideas and ways to ensure success. Record on a flip chart.
- **Agree** to consideration of these challenges, potential solutions and success factors in establishing a process to request and approve flexible work options that will ensure meeting business and coverage requirements.

*Note: Before the next meeting the manager should determine how team members can request flexible work options and address business and staffing/coverage considerations.*

## Meeting Three — Establishing a Flexibility Plan for the Team

- **Open** the meeting by reviewing the team’s discussion in the previous meeting regarding flexible work options being considered, potential challenges and solutions and critical success factors.
  - **Pre-record** key points on a flip chart to review with the workgroup.
- **Review** the process you propose to request flexible work arrangements and the key considerations to ensure staffing, coverage and business requirements.
  - **Facilitate** discussion to solicit feedback, answer questions and address concerns.
  - **Discuss** a timeframe for implementing these flexible work arrangements as a pilot and evaluating success.
- **Determine** what maintaining high performance will look or feel like when the workgroup is using new/expanded flexible work options.
  - **Ask** workgroup to identify the characteristics of “high performance” based on the workgroup’s coverage and business requirements.
  - **Record** on a flip chart and compare to the list of success factors developed earlier.
- **Establish** team agreements and operating principles to ensure success. Record on a flip chart.
  - **Establish** core hours, schedule and boundaries for coverage and accessibility as appropriate for your work environment and business demands.
    - Agree on hours and days that team members need to ensure coverage.
    - Should a team calendar and contact numbers be created or posted?
    - How does the team ensure consistency and fairness in use of flexible work arrangements?
  - **Determine** how to ensure effective, frequent and ongoing team communication.
  - **Determine** frequency of updating voice mail greetings and checking and responding to e-mail and voice mail if applicable.
  - **Discuss** how to respond to and handle unexpected events or “emergencies.”  
Ask team members:
    - What types of unexpected situations or emergencies might come up?
    - How might these situations be handled? Develop a plan.
  - **Determine** opportunities for cross training and leveraging resources to cover those on flexible work arrangements.
  - **Determine** schedule of team meetings — will it need to change? Will meetings be face-to-face or can teleworkers/remote workers participate by phone?
  - **Discuss** how to ensure that the valuable “informal” interactions and team building that typically happen in the office (water cooler conversations) can be recreated when employees are working off-site and/or on different schedules.

- **Agree** on how to hold each other accountable to these agreements.
  - **Determine** how the agreements will be finalized, documented and distributed to the team.
  - **Establish** a plan to monitor and evaluate success of the flexible work arrangement implementation.

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