



ARTICLE

Why should managers
get involved in helping
employees balance their
work and personal lives?

Because the business value
can be enormous.

*New sections to
guide you through
the article:*

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Work and Life: *The End of the Zero-Sum Game*

by Stewart D. Friedman, Perry Christensen,
and Jessica DeGroot

THE IDEA IN BRIEF

IN the old work-life paradigm, improvements in the quality of employees' personal lives came at the expense of their work performance, and vice versa. Or at least, that was the fear that drove many managers to insist on a strict separation between workers' job responsibilities and the other demands on their time. This separation was often so complete that managers had only vague notions about employees' outside interests and commitments.

But the unprecedented need for committed workers is leading companies to rethink the traditional assumptions. Managers are discovering that when they treat the work life and the personal life as complementary priorities instead of competing ones, employees respond with greater effort and loyalty.

THE IDEA AT WORK

How can you help employees find personal fulfillment in ways that advance organizational goals? By applying three mutually reinforcing strategies:

- 1. Clarify what's important.** Focus on outcomes, not process: be explicit about your unit's priorities and your expectations for employees' performance, but give employees great autonomy over how to achieve the goals you've laid out. At the same time, encourage employees to identify their concerns and goals outside the office. (Remember, such a frank exchange requires trust: you can't penalize employees for admitting that there is something in their lives besides work.) Use that information to create a blueprint for achieving business success and employees' fulfillment at the same time.

EXAMPLE:

An employee who was training to win a Gold Star in figure skating was allowed to practice in the morning when the rink is empty, arrive at work at noon, stay until 5 P.M., then take unfinished tasks home to complete in the evening.

- 2. Take time to learn about employees' personal situations.** Not only does this build trust, it also helps you create opportunities that capitalize on the knowledge that employees bring to the business from outside work.

EXAMPLE:

José learned that one of his key sales reps, Sally, was a volunteer fund-raiser for her alma mater. With Sally's permission, he arranged for her to represent the company in its recruiting efforts at that school. The new role reduced Sally's time with her customers, but it enhanced the company's ability to hire good people. Sally loved the work and her commitment to the company skyrocketed.

- 3. Continually experiment with how the work gets done.** Reengineering work processes can improve performance and simplify people's lives at the same time.

EXAMPLE:

As a new unit head, Hallie "inherited" Sarah, a burned-out administrator who was caring for her terminally ill mother. Hallie streamlined Sarah's job and got her trained to use a new computerized budget system. This gave Sarah greater control over her results; it also allowed her to work from home, which gave her more time with her mother. Sarah's attitude and performance soared.

Bringing personal priorities into the managerial conversation doesn't have to involve a lot of extra time—often two or three questions will do the trick. Still, this approach represents a radical departure for many managers. Start slowly: apply the strategies to a single employee, or to your own work-life situation.

Managers on the front lines are
using three principles to benefit their
organizations and individual employees alike.

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THE CONFLICTING DEMANDS OF WORK AND personal life have always been with us. People have always had children and elderly parents to care for; they have always pursued hobbies and devoted time to community activities. In the past, many managers dealt with such personal needs summarily: "What you do in the office is our business. What you do outside is your own." It was assumed, too, that employees would put the company's interests first. Work versus personal life, after all, was a zero-sum game.

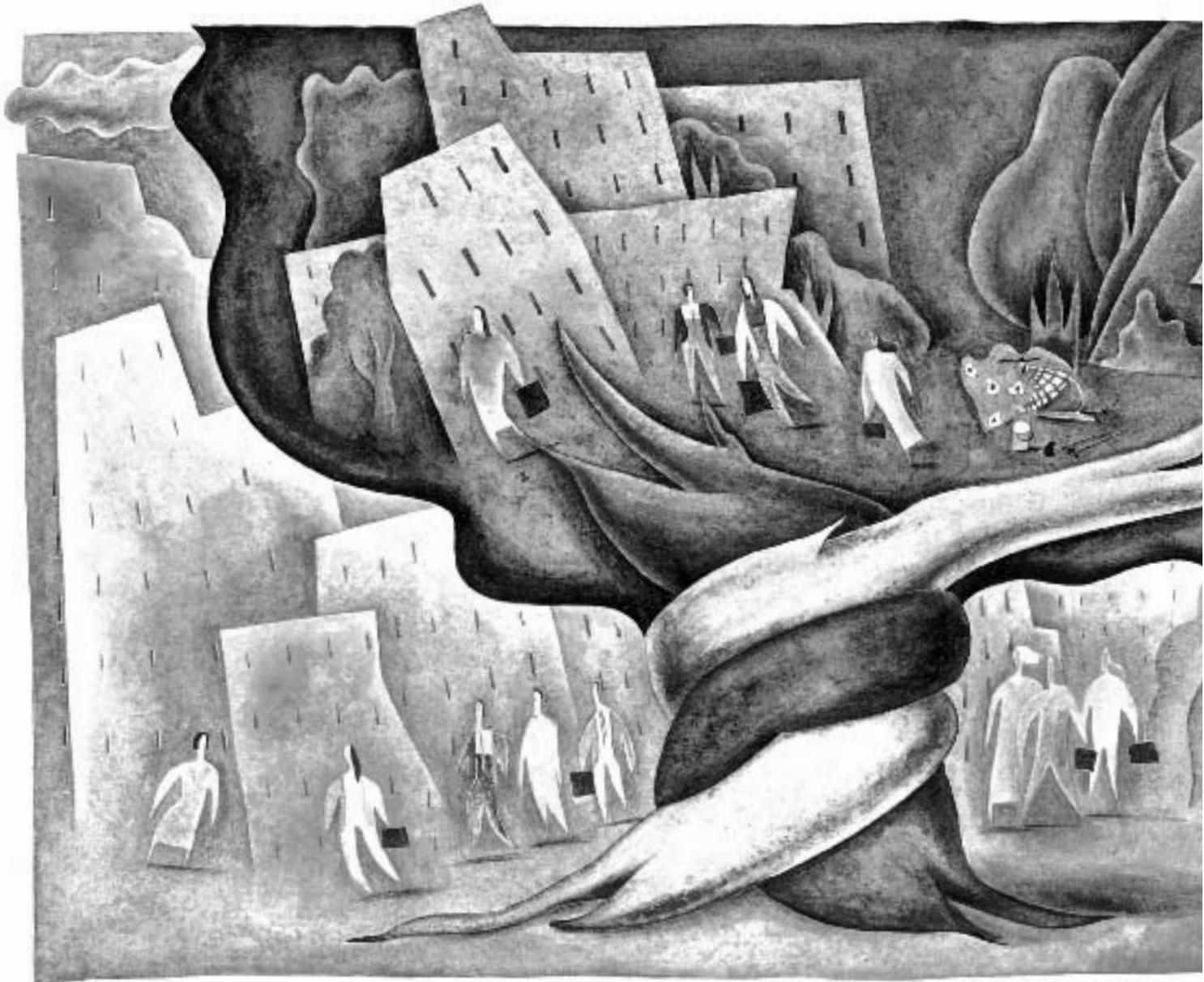
Have times changed? Yes and no. On one hand, striking demographic shifts, such as the increasing number of women in the workforce, have put more mothers on the job, heightening awareness of work-

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life issues. New economic forces, such as global competition, have also changed the landscape, creating an unprecedented need for committed employees at a time when loyalty is low in the wake of corporate downsizings. On the other hand, most executives still believe that every time an employee's personal interests "win," the organization pays the price at its bottom line. They consign work-life issues to the human resources department, where the problems are often dealt with piecemeal, through programs such as flextime and paternity leave. Such programs, however, rarely help more than a few employees strike a meaningful, sustainable balance between work and personal life because they do not permeate a company's culture or fundamentally change managers' behavior.

Under the Radar

In recent years, however, we have observed that a small but growing number of managers—many of them flying under the radar of officially sanctioned programs—approach the work-life question differently. They operate under the assumption that work and personal life are not competing priorities but complementary ones. In essence, they've adopted a win-win philosophy. And it appears they are right:



in the cases we have studied, the new approach has yielded tangible payoffs both for organizations and for individual employees.

These managers are guided by three mutually reinforcing principles. First, they clarify what is important. That is, they clearly inform their employees about business priorities. And they encourage their employees to be just as clear about personal interests and concerns—to identify where work falls in the spectrum of their overall priorities in life. The objective is to hold an honest dialogue about both the business's and the individual's goals and then to construct a plan for fulfilling all of them.

Second, these managers recognize and support their employees as "whole people," open-mindedly acknowledging and even celebrating the fact that

they have roles outside the office. These managers understand that skills and knowledge can be transferred from one role to another and also that boundaries—where these roles overlap and where they must be kept separate—need to be established.

Third, these managers continually experiment with the way work is done, seeking approaches that enhance the organization's performance while creating time and energy for employees' personal pursuits.

The three principles lead to a virtuous cycle. When a manager helps employees balance their work lives with the rest of their lives, they feel a stronger commitment to the organization. Their trust redoubles, and so do their loyalty and the energy they invest in work. Not surprisingly, their



performance improves, and the organization benefits. Strong results allow the manager to continue practicing the principles that help employees strike this work-life balance.

In the following pages, we will explore the three principles in more detail and illustrate how managers apply them. The cases are drawn from our research into several dozen U.S.-based companies of varying sizes in a variety of industries, supplemented by over 100 interviews conducted and analyzed by our colleagues at the Wharton Work/Life Roundtable. Each case shows that striking a balance between work and personal life is not the task of the manager alone; rather, it is a process that requires a partnership between the manager and individual employees. Ultimately, all the strategies

call for an honest two-sided exchange, as well as a mutual commitment to continual change.

Clarify what's important. In most organizations, employees rarely feel comfortable discussing their personal priorities. They worry that admitting a passion for singing with the local opera company, for instance, will be seen as a lack of passion for work. Such fear is not misguided. Most managers believe—or at least hope—that work is at the top of an employee's list of life priorities. For some, it is. For others, of course, work is just a means to the end of achieving other priorities. These people are often put in the uncomfortable position of having to pretend they care primarily about work-related issues that are actually of secondary importance to them.

The managers who strike a work-life balance with their people cut through the charade about priorities. They make business objectives crystal clear, and they define them in terms of outputs—in terms of results. Simultaneously, they ask employees to identify the important goals, concerns, and demands outside the office that require time and energy. One person might be responsible for his elderly mother's health care, which involves three trips to the hospital each month. Another might be in the process of qualifying for a Gold Star in figure skating. Still another may feel strongly that, at this point in her career, none of her priorities is more important than success at work.

Such a discussion of priorities can take place only in an environment of trust, and the managers who are striking a balance between work and personal life with their employees know that. They do not penalize people for putting personal concerns first or for putting them right alongside work. They do not try to persuade people to give up their extracurricular interests. Rather, they use the information about personal priorities to draw a road map toward a singular destination: business success achieved hand in hand with individual fulfillment.

The fact that these managers define business success in terms of results is key. To them, outcomes matter more than process. To that end, they give their employees specific goals but also great autonomy over how to achieve those goals. That way, the woman who is trying to receive a Gold Star in figure skating can practice in the morning when the rink is empty and rates are lower. She can arrive at work at noon, stay until 5 P.M., and then take unfinished tasks home with her to complete in the evening. To her manager, such a schedule is acceptable as long as she is producing the work her job requires.

Steve, a senior operations executive at a global bank, demonstrates the benefits of putting both

business and personal priorities on the table. For many years, Steve was a classic hard-driving boss, given to starting the day with 7 A.M. breakfasts with his staff. He also expected his top people to work as late as he did—sometimes close to 10 P.M.

One of those people was a vice president named Jim. At first, Jim played by Steve's rules, "living at work," as he describes it. Then one weekend, Jim's young son fell and cut his knee. To Jim's shock and dismay, the child refused to let Jim comfort him. Indeed, he treated Jim like a stranger. The event was a turning point. Although fearful for his job, Jim approached Steve and said that he had let slip the single most important priority in his life—a close relationship with his son. He made an offer: "Judge me by the quality of my work, not by the amount of time I spend at the office."

The request clearly disconcerted Steve, but because he valued Jim enormously, he agreed to evaluate Jim's performance based solely on his contributions to the bank's success. Both men then had to change how they got things done. They began to plan their time together more carefully. Their meetings became more focused; they cut down on the length and number of reports and memos they sent to each other and got right to the essentials in their communications. Until that point, Jim had helped Steve prepare for the 7 A.M. staff meetings in the half hour prior to them. Under the new arrangement, Jim briefed Steve the day before; soon, in fact, Jim was routinely skipping the 7 A.M. meetings, and his absence had little or no adverse impact. What's more, Jim was able to leave the office regularly at 5 P.M.

For his part, Steve found that Jim's energy and concentration at work soared. Indeed, having made his business and personal priorities explicit, Jim

An essential role of a leader is to make sure all priorities are part of the discussion of how to achieve success.

was able to pay unrelenting attention to key business issues while at work. As a result, his performance improved dramatically. He was rewarded with several promotions, rising quickly through the company's ranks.

In time, Jim went on to run a large credit-card business, and he is currently the chief operating officer of a major manufacturing company. Along the way, clarifying what's important has become a

fundamental part of his managerial style. In fact, he is well known throughout his current organization for taking family and personal considerations into account in scheduling both his own time and his employees' time.

Steve recently retired. In his farewell address to the organization after a long and successful career, he noted that his experience with Jim was a milestone in his development as a leader. He learned, he said, the business value of allowing employees to meet personal commitments as they pursue organizational goals. An essential role of a leader is to make sure all priorities are part of the discussion of how to achieve success.

Recognize and support the whole person. Most managers know about their employees' personal lives to some extent. They know, for instance, that one person has three children or that another is about to be married. Occasionally, they are aware of people's hobbies or community activities. This kind of incidental knowledge, however, bears little resemblance to the second principle as managers who balance issues of work and personal life practice it. Their understanding of employees is deeper and more detailed. Instead of knowing casual facts about people, and beyond learning about priorities, these managers recognize and support the full range of their people's life roles: not just mother or caretaker, but also volunteer with autistic children, aspiring concert pianist, or passionate golfer.

Why do these managers tune into their employees' roles outside the office? First, being sincerely interested in an employee's personal life creates a bond and, with it, trust—which brings organizational benefits familiar to any manager. Second, identifying the various roles helps these managers tap into the full range of their employees' talents.

Third, it is necessary for individuals to understand how their roles relate to one another—where they mesh and where they need to be kept separate—to establish effective boundaries. Establishing the boundaries helps remove distractions, allowing people to be more fully focused on the task at hand.

Finally, knowing about an employee's personal life is critical if a manager wants to put the first work-life principle to work, crafting a strategy to meet both business and personal goals.

Just as employees don't usually volunteer details of their personal priorities, neither do they openly offer information about their life roles. Indeed, such revelations are countercultural in most big companies today. That is why managers who adopt this

WHERE TO BEGIN

Putting the three principles into practice does not happen overnight. It can't—the changes required by this new approach are too substantial to be instituted without stops and starts, and periods of evaluation. Therefore, when managers ask us how to get started, we often suggest that they begin by applying the principles to one employee. Think of Steve, the senior executive who once expected his staff to work from 7 A.M. to 10 P.M. He used the three principles to help one person—Jim—strike a meaningful balance between work and personal life. The arrangement—and its successful impact on both Jim and the business—gave Steve the experience and the confidence he needed to apply the three principles more broadly. Eventually, the principles became the foundation of his management style.

A second way to get started with the principles is to initiate an organizational dialogue about integrating work and personal life goals. In small-team settings, a manager might even lead the process of creating a work-life philosophy statement. We have seen such dialogues facilitate the implementation of the principles by bringing to light thorny issues such as the organization's level of commitment to striking a work-life balance or employees' fears about sharing private information about their personal priorities and life roles.

As a third starting point, we suggest that managers try applying the three principles to themselves to find out how well they personally have leveraged work and

personal life. First, a manager might ask, "How well do I clarify my own life goals? Do I know where work falls in my list of priorities? What trade-offs am I willing to make to achieve my goals?"

Second, a manager might consider, "Do I understand my varied life roles—such as parent, child, cub scout master—in terms of how they overlap and when they must be kept separate? That is, have I considered what skills and knowledge can be transferred from one role to another, and have I explicitly formulated the boundaries of each role?" Some executives, for instance, will not check voice mail on weekends; others let their work and personal lives blend.

And finally, a manager can explore his or her comfort level with the third principle of continual experimentation by asking, "Do I regularly challenge the way I myself approach tasks, both at work and at home? How do I react when other people suggest new ways to get things done? Am I defensive or intrigued?"

A self-assessment is useful because it shows managers who want to embark on the journey of striking a balance between work and personal life how sensitive they may or may not be to the struggles of employees trying to do the same. Does that mean people who don't have their own house in order should avoid managing with the principles? Not necessarily, but they should be aware that striking a work-life balance, like many other aspects of effective management, can take time, energy, and commitment. Given its added value, however, the process appears to be well worth the investment.

principle demonstrate their commitment to it by acting as role models. They openly discuss the benefits and demands of their own roles outside work. The manager of a 15-person work group at a manufacturing company, for instance, freely discusses the challenges of her role as the head of a blended family. At home, she cares for six preteen children from her previous marriage and her husband's two previous marriages all living under one roof. Not only does she apply her experience resolving conflicts in her own family to settling differences within the work group, but she also openly admits, "Everything I know about negotiation I learned at the dinner table." The manager's honesty about her roles as a mother and stepmother invites her employees to be similarly candid about their personal roles.

Another way managers recognize and support the whole person is by valuing the knowledge and skills employees bring to the business from their

lives outside work. [In one company we studied](#), for example, a manager named José found out that one of his key sales representatives, Sally, was intensely dedicated to her alma mater, a Big Ten university. She was an active fund-raiser for the school and often used her free time to recruit local high-school students.

After receiving Sally's permission, José called the company's recruiting director. He described Sally's knowledge of and commitment to her alma mater and asked if it would be possible to get her assigned as the company's liaison in its recruiting efforts at the school. As it happened, the company had been having limited success at the school, and the recruiting director was looking for ways to both improve the company's reputation on campus and increase the number of students it was able to recruit, particularly for the sales force. The recruiting director welcomed the chance to talk with Sally, and they met soon thereafter.

The recruiting director was impressed with Sally's energy, ideas, and the relationships she had already forged with the university. He offered her the position of liaison, a task that would likely take up to 20% of her time for half the year. She would replace another sales rep—an individual without personal ties to the school—who was currently doing the job. Sally brought the liaison proposal to José who, despite the fact that it would mean that Sally would

Conflicts between work and personal priorities can be catalysts for identifying work inefficiencies.

spend less time with her customers, recognized the business value of increasing the organization's ability to hire more sales reps from the university.

Why did he agree? First, he correctly anticipated that because of her feelings about the school, Sally would do a great job, and her relationship would bear fruit in the company's recruiting effort. Second, he accurately predicted that the loss of Sally's time with customers in the short term would be minimal since she was already spending some of her discretionary time on school events. Finally, José expected that Sally would be grateful for this opportunity to combine her interest in the school with her work. And she was. Sally told us that after she received the liaison position, her commitment to the company skyrocketed. As often is the case, exercising the principle of recognizing and supporting the whole person benefited not just the individual but the company as well.

Continually experiment with the way work is done. Most managers in today's rapidly changing business environment know how important it is to find ways to increase efficiency and productivity. Still, new methods and different ways of thinking about work can be daunting, if not threatening. Managers who embrace the third work-life principle, however, see experimenting with work processes as an exciting opportunity to improve the organization's performance and the lives of its people at the same time. They have discovered that conflicts between work and personal priorities can actually be catalysts for identifying work inefficiencies that might otherwise have remained hidden or intractable. That's because taking a new set of parameters into account can allow people to question ways of doing business so ingrained that no one would think to consider changing them otherwise.

These managers encourage employees to question basic assumptions, such as the common sales mantra: "Real commitment means total availability." "Does it really?" they ask. "Can we find creative ways to demonstrate total commitment to our customers without being available every waking moment?" They also encourage employees to learn, through trial and error, about new ways to organize work that might well challenge the legitimacy of existing practices.

Many work practices are legacies of outdated industrial models in which employees had to be physically present during "normal" business hours. The managers who strike a work-life balance with their employees, however,

recognize that newer telecommunication tools—such as e-mail, voice mail, teleconferencing, and computer networks—can create greater flexibility in how, when, where, and with whom work is accomplished. In addition, they are willing to explore alternative arrangements like job sharing to see if they can improve organizational efficiency while freeing up employees' time.

Hallie is a manager who—by meeting both business demands and her employees' personal needs—was able to reinvent the way work was done in her organization. As the new department director at a food services company, Hallie learned that she had inherited an older employee named Sarah, an administrative assistant who was perceived to be unmotivated and cynical. Her attitude, Hallie was told by other employees, badly hurt morale. They recommended, in fact, that she fire Sarah if she could.

At Hallie's first meeting with Sarah, she learned that Sarah enjoyed working with numbers but was not permitted to do finance work because of her inexperience with computers. Hallie also learned that Sarah was caring for her mother, who was in the late stages of a terminal illness. As her mother's condition deteriorated, Sarah found she had to go to her home in the morning and again at lunch to tend to her mother's physical and household needs. In addition, Sarah also managed her own home—chores, yard work, and paying the bills.

Hallie could have heard Sarah's story and asked, "How can I rid myself of this burden?" Instead she asked, "How can we work differently, in a way that will improve the department's performance and preserve the dignity of the employee?"

Together, Hallie and Sarah explored possible answers. They were able to identify inefficiencies in the department's work processes, including those

in Sarah's job. The department had been formed recently as a result of the consolidation of several different groups. Yet Sarah was maintaining separate budgeting and inventory control systems. Combining them would streamline data collection and analysis.

Knowing of Sarah's interest in finance, Hallie arranged for her to be trained on Excel, on a new Excel-based budgetary system, and in basic analytical processes, which gave her greater control over the department's finances. The change had immediate effects. Sarah now gathered more relevant data in a streamlined and logical manner, allowing managers to interpret the information faster and more intelligently. At the same time, working with numbers greatly increased Sarah's interest in her job. Her morale and performance improved markedly. And working on a computer made it easier for her to care for her mother; she could even work from home when her mother needed more attention. As a result of the change in the content and flexibility of her job, Sarah had an easier time coping with her mother's final days.

A Mutually Reinforcing System

Each of the three work-life principles might be practiced by itself, but more often they are practiced together. That's because the principles reinforce one another and, in fact, overlap to some degree. Encouraging employees to be explicit about their personal priorities, for instance, is a necessary element in recognizing and supporting an employee as a whole person. Valuing productivity over face time is a necessary element in experimenting with work processes. Both involve a manager caring more about the ends than the means. Let's look more, then, at all three principles working together.

Consider first the case of Sam, the director of a 24-hour command center at a pharmaceutical company's largest site, a plant with 8,000 employees. The 30-person center monitors more than 10,000 "hot spots" at the site, such as fire alarms; sewage lift stations; and, in particular, a hazardous manufacturing process. For example, the command center oversees several vaults that house chemicals being stored at minus 70 degrees Fahrenheit. Employees working in the vaults must wear special protective suits and are allowed to stay for only ten minutes at a time; if they stay longer, the center considers it an emergency and responds in kind. Such incidents are not uncommon and, as you might expect, work in the command center can be stressful.

Because the command center needed to be staffed around the clock, its schedule was always a challenge. Sam frequently had trouble filling the midnight to 8 A.M. slots in particular. Shifts changed 21 times each week, and exchanging information between members of incoming and outgoing shifts was cumbersome. To make matters worse, the command center was about to be handed more work. The number of hot spots under its supervision was set to increase by 50% to 15,000 within the next year and perhaps even to double to 20,000 within two years.

Sam could have seen the burgeoning workload at the command center purely as a business problem and sought an exclusively business solution. How could he fill the center's schedule, keep overtime down, and make sure information was exchanged efficiently? But Sam also realized that a heavier workload was bound to have an impact on his staff's personal lives. Financial constraints made hiring more people out of the question. The existing staff would need to work longer hours under more stressful conditions. If he ignored those facts, Sam believed, any solution he arrived at would not be sustainable. The members of his staff were not robots but whole people with rich and varied lives. Just as the business imperatives had to be accounted for, so did his people's personal needs and concerns.

Sam's first step was to call his staff together and explicitly define the command center's business goals. He talked about how the group's work was essential for the safe operation of the entire site, including the critical research and manufacturing processes. He was open about how the center's workload was sure to increase and about the fact that they could not just throw more people at the problem.

Sam had a vision of the command center as more customer focused, proactively anticipating the needs of the site. He described to the group, for ex-

Valuing productivity over face time is a necessary element in experimenting with work processes.

ample, the need to improve the way manufacturing lines were shut down for maintenance and repair. He stressed the importance of forecasting needs as far in advance as possible, rather than waiting for an emergency to galvanize everyone to action. Sam knew that to achieve his vision, everyone would have to pay more attention to feedback from the

center's customers, that the staff would need more training, and that there would simply be more plain, hard work—and he told them so. At the same time, he explicitly acknowledged that the demanding workload might have a negative impact on his employees' personal lives, and he invited them to describe to him and to one another how the schedule could adversely affect them.

After that discussion, Sam opened the door for radical experimentation with the way the command center was run. He asked the staff itself to design a solution to the scheduling problem that met not only the business needs he had outlined but also their own personal requirements. As many executives who operate according to the three principles do, Sam told the employees that no solution was out of bounds as long as it produced the results they were looking for. He also told them that they did not have to solve all the center's problems at once. They could test possible plans of action, gradually learning from those experiences what would work and what would not.

Within several weeks, Sam's people had developed a comprehensive new approach to staffing the center. They would work 12-hour shifts, three days on and four days off one week, four days on and three days off the next week. Over the course of two weeks, they would work 84 hours, which worked out to four more than they had in the past. But at the same time, work schedules would be steady and

The three principles are typically put in practice by managers “flying under the radar” of officially sanctioned programs.

predictable, and their time off more concentrated. It added up to an acceptable trade-off.

The system has now been in place for more than two years, and it has far exceeded expectations. At work, the new schedule has eliminated seven shifts, which means that information is now exchanged seven fewer times, reducing errors and oversights during shift transfers. The predictability of the schedule has reduced overtime considerably, as well as the number of personal days the employees take. In addition, the new schedule has led to a better way to train supervisors. In the past, they had been stuck in the command center whenever there was an unexpected hole in the schedule. Often they were alone on the night shift, during which they learned

little and potentially compromised safety. But now they are rotated systematically into the command center in all shifts to learn the processes, systems, and safety procedures.

Much to Sam's delight, the new system has allowed the center to become the proactive, customer-focused group he had envisioned. Now that staff members work on a set schedule and aren't scrambling to fill empty spots, they can spend more time on coordination and process improvements. For example, there was a time when sales of a new drug boomed, exceeding forecasts by 300%. Unfortunately, the drug's manufacturing line was scheduled to be closed for six days of maintenance. Working with production and maintenance supervisors, the command center was able to reduce shutdown time to two days.

Finally, because the schedule has become predictable and acceptable to all, there's less strife among employees and less strife between employees and management. In short, morale is up and stress is down. Not surprisingly, productivity has improved.

At home, the new schedule has allowed employees to meet their personal needs in ways that were not possible under the old system. One person was able finally to go to school during the day to earn a master's degree. Another earned a certificate degree on her days off. Many employees have told Sam that simply feeling that their lives are predictable has allowed them to relax when they are home and plan

more personal projects and events. The new schedule has been so successful from a lifestyle point of view that, somewhat ironically, it has created a high demand to work in the command center. “We are a magnet now for transfers and new hires,” Sam recently observed.

We found another example of the three principles working in tandem at a global, 80,000-employee manufacturing company where senior executives were anxious to determine the best way to transfer knowledge from region to region. They decided to test a radical new approach that had two parts: a computer-based data warehouse that would allow sales representatives to collect and share sales and marketing information in real time and a territory management system that would allow each sales rep to run a fully functioning, independent operation. The success or failure of the two pilot projects would determine the company's direction for global marketing and sales.

A task force consisting of three men and three women was created to oversee and coordinate the pilot projects. It was headed by one of the women, Terry. From the outset, pressure on the group was

intense; the company's leaders believed that the way the organization managed the process of learning and of transferring information was critical to its competitive success. Despite the pressure for results, Terry strongly believed that if she let business objectives nullify personal ones, the task force would fail on all counts. "To ignore people's personal issues was unrealistic," she noted. At the time, all the team members had significant personal issues: two pregnancies, three recent births, one person on a part-time schedule, another in a demanding M.B.A. program at night, and still another in the midst of a family separation.

Before the task force's first meeting, Terry met individually with each member to discuss the demands he or she faced in the coming year and to help identify each person's spectrum of priorities. Then, at the first group meeting, Terry led a discussion of business objectives. She explicitly defined what the company's leaders expected of the team, as well as the timetables and specific tasks involved. She identified how the team's performance would be measured and what kind of results would constitute success.

Next, Terry opened up the dialogue on personal priorities and brought in the discussion of roles. She asked a couple of questions to get it going: "Despite the amount of work we will all have to do, what personal priorities do you want to make sure are not compromised? In other words, what is most important for you from a personal perspective as we embark on this work?" Team members voluntarily disclosed challenges in their personal lives, which they felt comfortable doing because of their prior separate conversations with Terry. The meeting concluded with the team brainstorming about how business and personal objectives could be reached at the same time. Members decided, for instance, that they needed to know how to do one another's jobs so that they could cover if anyone had to miss work. They also decided that they needed to constantly keep abreast of everyone's schedules and personal demands so that no one would be taken by surprise, and the flow of work would not be disrupted, if a member was absent.

As the pilots progressed, weekly planning meetings continued to focus on both business and personal priorities. Members did learn one another's jobs inside and out, and constantly updated everyone on the demands of their personal lives. As one team member said, "We knew each other's home routines, school holidays, and soccer practice schedules. It was easy to do this because we talked about everything up front." The lengthy stretch needed for a christening in Paris or for a six-week vacation that had been booked a year in advance—and other

personal time constraints—were known and accounted for as legitimate business issues.

As the pilots concluded, there could be no doubt that the team's results were impressive. All of their ambitious deadlines were met or beaten. Moreover, the fact that everyone knew everyone else's job added to the creativity and value of the team's output. Most important, the team achieved its goal of developing systems for knowledge transfer that could be used throughout the company worldwide. They were evaluated in a 360-degree process by their customers, team members, and their senior management sponsors. The project was successful from every business measure they had established.

Not surprisingly, the team members' lives and careers were enhanced by their experience on the task force. No one had to compromise personal priorities because of work. And, as one team member said, because of the openness and trust created within the team, "the project was the most satisfying work environment I have ever been in." Professionally, members of the team flourished after the project was completed. Terry, for instance, received a major promotion and now heads up the strategic-support function for one of the company's largest regions.

Getting Beyond the Status Quo

As we've said, the three principles are typically put into practice by managers "flying under the radar." Our next case, however, involves the manager of an HR department at a prominent accounting firm who actually used the principles to put the issues on the radar screen, thereby enhancing the performance of his organization's business-assurance department and the life of one of its senior associates, an aspiring novelist we'll call Jane.

Jane had joined the firm after graduating from college with a double major in accounting and English. She enjoyed her work—and was considered a strong performer by her superiors—but she also yearned to find time for her real passion, creative writing. After rummaging through the materials that were handed out back at her orientation, Jane came across a pamphlet that discussed the company's policy on alternative work schedules. She had hoped there would be a way to develop a schedule that would take advantage of the seasonal nature of the accounting business and allow her to carve out significant blocks of time for writing. But none of the examples of alternative schedules in the pamphlet came close to meeting her needs. Even though it felt risky to ask for something radically different, Jane approached Harry, the HR manager responsible for her department. In a way, there was no one else

to turn to. Because of the project-based nature of Jane's work, the managers supervising her job were always changing. Much to her surprise, Harry was receptive and said he would be glad to work with Jane to craft a solution to her work-life dilemma.

Jane began by suggesting she reduce her workload from 12 to 8 clients. The change would mean that in the off-season she'd have sufficient chunks of time to focus on writing. Client by client, Harry and Jane decided which ones to keep and which to pass on to other associates. They then charted out the expected work for the upcoming year, making sure there would be enough time both for fulfilling her clients' needs and for writing.

At first, the plan seemed like a good one. Unfortunately, Jane quickly began to doubt how realistic it was. Often during her writing time, she would get a call from the central assignments department, putting her on another job. Although Jane knew she could legitimately decline those assignments because she had already completed the work she had contracted for, she was concerned that refusing work might have ramifications for her career later on. Hesitantly, she approached Harry a second time.

Harry was again receptive, inviting Gabriel, a member of the central assignments department, to

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join the discussions. The three of them then developed a method by which Jane's hours were logged so that there no longer would be any confusion about when she had extra time available for work and when the extra time was reserved for writing. Jane also suggested that she change the way she did her work. Could she try e-mailing and faxing her clients, she asked, instead of assuming that a face-to-face meeting was always necessary? Harry agreed to let her experiment.

The benefits of the new arrangement became apparent within the year, particularly with regard to Jane's capacity to contribute to the firm. With fewer clients, Jane felt more focused at work and thus more committed and effective. Previously, she had been moved from project to project and sometimes from crisis to crisis. Now she could plan her time in advance and concentrate on end results more creatively. In fact, she found that for the first time she had

enough energy and time to reflect on better ways to get her projects done. Her clients responded positively; Jane's efficiency allowed her to work more quickly, which in some cases reduced their fees. And meanwhile, Jane was able to write two novels.

Three years later, still following this alternative work schedule, Jane was promoted to manager at the same time as others in her cohort. As a manager herself, Jane now practices the three principles. She believes they help her keep and motivate quality employees. Not only is it costly to replace a good employee, but, she notes, "people who are constantly under pressure will take the path of least resistance, doing things the way it was done last year instead of looking for ways to improve on the product." Furthermore, Jane points out that, unlike in other work groups at the company, "my group doesn't have to work weekends. Instead, we've found out everyone's parameters, discussed what work needs to get done, and focused on the end results."

Recently, Harry and Jane served together on a task force that's looking for ways to apply more broadly what they learned from practicing the three principles. They are exploring the development of a project database that would make it easier to anticipate the workload in advance and even out the assignments among the associates.

They are looking into the possibility of defining expected work hours more explicitly. They believe that this will encourage a new attitude whereby excessive work hours will be seen not as a measure of commitment but as an indication of the need for better planning.

Although Jane and Harry are plainly aware of the benefits to the business of the approach they've developed, Jane is also absolutely clear about the personal benefits. "Neither activity, work nor writing, was appealing in isolation. I didn't want to be a starving writer, forced to write to earn a living. But I also felt that if I stopped practicing my writing, my creative side would die, and then the job would just become a job. Until we worked out this solution, I felt like it had to be an either-or choice, but now I see it doesn't have to be that way. Both sides can win."

A New Breed of Managers

If the three principles are so effective, why aren't they more widespread? There is no single answer. Some managers block the new approach to balancing work and life because they are bound by tradition and continue to value face time for its own sake.

They believe that productivity is a function of time spent in the office – not energy invested in the work. Other managers are simply unaware that their employees might be able to bring skills and knowledge to their jobs from their lives beyond work. And still other managers consider the whole topic of striking a balance between work and personal life as a women’s issue – in other words, not their problem.

We have also found that managers resist the three principles because they fear that taking an employee’s personal priorities into account will create either a sense of entitlement or feelings of resentment. Take the case of Sarah and Hallie again. Once Hallie allowed Sarah to work at home to care for her ailing mother, these managers might reason, what’s to stop everyone in the office from asking for some sort of special treatment to make his or her life more convenient or enjoyable? If we oblige, these managers might argue, we risk creating a slippery-slope situation in which the organization is expected to strike a work-life balance for every employee. If we don’t, we are certain to anger people who feel slighted. Why should Sarah be allowed to work at home, another employee may ask, if I still have to come into the office when my child or husband is sick? What makes her more deserving than me?

It’s understandable that managers worry about setting off waves of entitlement and/or resentment. But interestingly, the managers in our research who use the three principles rarely run into that. Because these managers deal with all of their people individually, every one of their employees does, in fact, receive “special” treatment in terms of a work plan that takes personal priorities into account. Therefore, there is less chance for resentment to fester. As for entitlement, the enormous loyalty these employees feel toward their managers usually outweighs it. Indeed, when a manager helps his or her employees strike a work-life balance, they feel grateful more than anything else.

Even when managers are inclined to operate with the three principles, many tell us that they don’t because they believe it would be impractical and complicated. How time consuming it must be to delve into the varied priorities and life roles of every employee, they argue. And imagine how much energy it would take to create a series of individual action plans that fulfill both professional and personal goals.

But we have found that, in reality, following the three principles does not involve that much more time or energy than managing in more traditional ways. Virtually all managers today are held accountable for developing their employees professionally –

that is, they already engage in discussions about what their people want and need from work and what they are expected to contribute. To bring personal-life priorities and goals into the conversation really only involves asking two or three more questions. And often the answers to those questions are so illuminating, they make the development process more honest – and more efficient.

Sometimes the “work” of the three principles can be delegated to the employees themselves, who can apply them personally and to their dealings with one another. In fact, we have seen that people become quickly engaged in this process as they come to realize that the solutions they develop will benefit both the business and their own lives. Consequently, the principles need not sap any more time or energy than conducting management as usual.

Out from Under the Radar

No two companies – indeed, no two managers – approach the relationship between work and personal life exactly the same way. But it is fair to say that all organizational practices fall along a continuum. On one end is the *trade-off* approach, whereby either the business wins or personal life wins, but not both. Further along is the *integrated* approach, in which employee and manager work together to find ways to meet both the company’s and the employee’s needs. That approach is indeed becoming more common, as an increasing number of companies use “life friendly” policies to attract and retain talented people.

Taken together, the three principles fall at the far end of the continuum – the *leveraged* approach, in which the practices used to strike a work-life balance actually add value to the business. Not only do the three principles seem to help people live more satisfying personal lives, but they also help identify inefficiencies in work processes and illuminate better ways to get work done. Think of the pharmaceutical company’s command center, for example. Using the three principles, its staff created a new and successful solution to its managerial problems that neither the trade-off nor the integrated approach could have achieved.

The growing cadre of managers who use the three principles to help their employees strike a work-life balance typically do so without official sanction. But perhaps as the business impact of their approach becomes better known and understood, a shift will occur. Managers who once flew below the radar will themselves become beacons of change. ▢

ARTICLES

“When Executives Burn Out” by Harry Levinson (*Harvard Business Review*, July–August 1996, Product no. 4290)

Psychologists associate burnout with feelings of anger, helplessness, and depletion; physiological symptoms such as frequent headaches and the inability to shake colds; and characteristics including cynicism, negativity, and irritability. “Work and Life” shows how individual managers—and even better, whole companies—can provide the support and options people need to avoid burnout and exhaustion. This article, by contrast, asserts that workers can no longer look to the employer for such support. When the article was originally published in 1981, Levinson urged companies to adopt policies to prevent burnout: Rotate managers out of potentially exhausting positions. Don’t let the same people be the rescuers of troubled situations again and again. Help ambitious people to moderate their own excessive demands on themselves. Provide safe avenues for people to express the inevitable disappointments and defeats. In this 1996 republication, Levinson has updated his advice, noting that the relationship between employer and employee has changed dramatically in the intervening years. He argues that people must develop greater self-reliance in their careers, including being true to themselves as a way of avoiding stress and burnout.

“The Alternative Workplace: Changing Where and How People Work” by Mahlon Apgar, IV (*Harvard Business Review*, May–June 1998, Product no. 3677)

The alternative workplace (AW), usually the employee’s home, is not a fad. Some 30 million to 40 million people in the U.S. are now either telecommuters or home-based workers. Apgar explores the wide range of options made possible by electronic communications—a helpful and encouraging menu of options for managers who want to implement the principles described in “Work and Life.” From the company standpoint, AT&T, IBM, American Express, and even the U.S. Army have achieved significant savings by allowing employees more flexibility in where and when they work. Apgar’s *how-tos* include starting with a simple pilot project similar to the approach suggested in “Work and Life.” To launch it, divide the target employees into the office-bound, the travel-driven, and the independent; then think through how they’ll interact. Make sure everyone is clear on performance objectives and measurements. And maintain human contact. It isn’t true that all AW employees need is a laptop and a cell phone. They also need technical support and, perhaps more important, a sense of social engagement with their fellow workers.

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