REMOTE WORK, DISPERSED TEAMS + THE FUTURE OF WORK |

Managing Telework for Organizational Success

A Zylter Practical
Innovation White Paper

[April 2020]

Paper Background

The COVID-related disruptions of 2020 have required a vast majority of the workforce to work from isolation, making telework and dispersed collaboration essential for success. These demands are accelerating the long-term adoption of telework and dispersed collaboration since the 2000s. Organizations are seeking to identify best practices to sustain and even improve individual and team performance while dispersed. This paper applies insights from an extensive study to help organizations identify and implement practical methods for successful telework and dispersed collaboration.

In 2018 Zylter initiated a detailed study and assessment of telework trends and their implications for the Defense Logistics Agency (DLA). This study provided data, observations and best practices across teams, operating units and locations that are immediately applicable now. To better understand and manage the implications of telework on the performance and culture, DLA requested the Zylter examine the extent to which telework impacts organizational ability to create/sustain a high performing work environment and build a coherent culture.

Zylter key telework study tasks included:
1 | Review and analyze existing DLA data
2 | Conduct interviews with 17 senior Leaders and 22 focus groups across MSCs
3 | Benchmark DLA telework policies with comparable organizations
4 | Identify key findings & recommendations for improvement

Purpose + Design

This white paper shares immediate insights and best practices from our extensive field research to help organizations effectively adapt and manage dispersed work during disruptions or as a long-term strategy. The paper summarizes key aspects of the analysis. The appendices include practical information and resources designed by Zylter to address critical organizational needs and challenges.

Zylter's Mission + Impact

Zylter is a team of industry veterans and innovators with deep experience in organizational analysis and technology design. Our mission is to share our strategic knowledge, expertise and resources to enable organizations and leaders to drive technology absorption, foster innovation, enable new work models and develop the workforce of the future. We achieve our mission through an innovative mix...

More information on Zylter capabilities, projects and publications is available at www.zylter.com

Analysis — Tailored frameworks that merge quantitative and qualitative data to address client specific questions

Design — Application of product- , graphic- and information-design methods to deliver compelling content and reusable resources

Strategy — Thoughtful guidance based on deep experience, rigorous analysis and well-designed resources

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Key Findings

Organizations are fundamentally collective and integrated. Organizational performance, integration of tasks and culture are fundamentally collective and are often challenging to build through a set of individual and isolated experiences.

Engagement and support of supervisors is essential for success. While senior leader decisions influence long-term trends in telework policies, first-line supervisors are central to the day-to-day actions to successfully adopt, implement and manage potential adverse impacts of telework and dispersed collaboration.

Too much telework can lead to undesirable outcomes. Although extensive telework is not easily described in quantitative terms, broader industry experience validates reasonable concerns about long-term effects on organizational culture and workforce development from unmanaged use of telework.

Key Recommendations for Successful Telework and Dispersed Collaboration

Telework Participation
Review current organizational policy and implementation guidance to ensure a consistent interpretation and appropriate outcomes. Identify metrics to track the extent and impact of telework while identifying options for appropriate situational telework.

Telework Policies
Review current policies based on organizational experience and trends to ensure the policy intent and specific language effectively communicate current priorities and intended value proposition for organizational use of telework.

Tasks/ Processes
Review current policy, guidance and resources to ensure supervisors have the appropriate tools to guide and manage telework and dispersed collaboration. This should include a frank assessment of individual and collective task requirements and how the execution of these tasks align with telework policies and priorities.

Organizational Structure & Leadership
Identify metrics to measure and policy provisions to optimize the benefits of teleworking for individual performance while managing the potential challenges associated with "extensive telework." Leverage the positive experiences in existing business case studies to identify and apply best practices for managing extensive telework when it is appropriate and required.

Workforce
Review policy, guidance and resources to ensure both immediate worker benefits and potential long-term workforce concerns are explicitly identified and considered in policy implementation.

Operating Environment
Identify, understand and leverage the internal operating environment features (e.g., sufficient and inviting office space) promote desired team interactions. Understand the external "pull," "push," and "transactional" factors that influence individual telework decisions.

Technology
Assess how the organization's current communication/ collaboration technologies and their integration (or lack thereof) impact collective and individual task execution. Continuing organization tech design, investment and modernization should explicitly consider telework and dispersed collaboration demands.

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Key Telework Study Conclusions

Individual Telework Decisions Impact Collective Culture and Performance

Organizational performance and culture are fundamentally collective and are often challenging to manage through individual telework decisions and actions.

Organizational telework policies often establish the mutual success of the organization in support of the mission, workforce efficiency, and resiliency as primary goals for telework and dispersed collaboration. However, policy provision often orients on promoting telework and guiding telework determinations for individual positions and tasks. Aligning individual actions and priorities with desired organization outcomes requires a standard set of assumptions shared by the workforce that does not always exist and detracts from the successful management of telework.

Varied perspectives, metrics, policy interpretation, and usage rates across organizations like DLA often indicate the absence of a single "pattern of shared basic assumptions" surrounding telework policy and usage. To establish appropriate policy goals that promote appropriate telework, organizations must pay attention to nurturing a collective culture and pattern of shared based assumption as telework expands.

Edgar Schein, a leading organizational scholar, defined culture as: "A pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems. A product of joint learning."

Support For and By Supervisors is Essential for Successful Telework

Organizations must prioritize engagement and support for supervisors due to their central role in day-to-day actions to successfully adopt, implement and manage the potential mission impacts of telework.

Through 20+ focus groups with 125+ supervisors across DLA indicated that, more than any other cohort within the organization, lower-level supervisors are required to balance the benefits of telework for employees with organizational effectiveness. Our analysis suggests the gains in employee satisfaction and sustained performance are often due primarily to supervisors personally mitigating shortfalls and managing challenges associated with teleworking teams. Supervisors indicate they desire resources, especially more demonstrative senior leader support, to formulate and apply telework plans and guidance based on both individual and organizational needs.

Extensive Telework is Subjective, But a Concern for Culture and Workforce Development

Extensive telework does present some reasonable management concerns related to the long-term impacts of telework on organizational culture and workforce development

While Zylter study responses and broader industry analysis are mixed about defining "extensive telework" in quantitative terms. The most common answer is more than 50% of employee time out of the physical office due to telework, vacation, training, exercise and other authorized uses. Supervisors and senior leaders commonly identify a qualitative "tipping point" when more than half of a group's collective time is spent outside the office where organizational culture fundamentally changes. However, responses are much less certain about whether resulting changes from telework are necessarily positive, negative, or mixed.

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Best Practices for Telework Success

Performance-based management of task execution

Supervisors who report no adverse impacts on operational effectiveness from telework also often report the ability to measure individual worker contributions with clear metrics. Study responses indicate that demonstratable metrics allow supervisors to set and enforce clear standards of performance with minimal concern about employee accountability or responsiveness. However, some supervisors describe team functions that are inherently qualitative and hard to measure. These supervisors often report more challenges ensuring productivity and engendering the interaction required, especially for short-notice or nonstandard collective assignments.

Adoption and application of evolving technologies

Supervisors who report positive experiences and collective productivity with telework also indicate extensive and often unprompted employee use of available technologies. With the use of Skype and other available tools enable person-to-person connection and collaboration between team members. Other tools for network storage like Microsoft Teams allow the sharing of information across teams.

Software and systems such as Microsoft Teams and Miro provide flexible collaborative platforms for exercises such as:
✓ Virtual focus groups
✓ Brainstorming
✓ Ideation

Use of situational telework as a flexible alternative to balance organizational and work needs

Government and commercial organizations respondents consistently indicate that situational or as-needed telework is a useful resource to accommodate employee desires for work-life balance while maintaining organizational flexibility to respond to emergent or varying collective task requirements. Some commercial organizations report no use of scheduled telework, only situational or as-needed telework with supervisor concurrence.

Facility usage and designs to support interaction and optimize the use of available resources

Society of Human Resource Managers (SHRM) and others have highlighted the importance of facility design to support telework and realize desired savings from telework. The layout, design and features of physical spaces offer opportunities to increase employee desire to work in the office. Spaces can also support and encourage a range of interactions from deliberate collaboration, to ad hoc meetings to solitary work. While benchmarking indicates facility usage as a best practice, it also highlighted how many government organizations face challenges realizing the potential facilities-related savings from telework due to less flexible policies for space management and leasing.

Development of "green tape" to support successful policy interpretation and supervisor application

This study and broader research indicate that sustained management support for telework policy adoption is a critical factor for long-term success. Similarly, the supervisors indicate the need for policy implementation guidance and resources that enable the systematic description of collective and individual task requirements when making telework judgments. Broader research on organizational policy implementation identifies characteristics of such positive and useful rules as "green tape" (as opposed to "red tape").

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Application of Our *STS Approach + Toolbox* to Improve Telework Operations

For this study, we applied our *Sociotechnical Systems (STS) Approach* to identify, assess and address the implications of telework for effective DLA operations and dispersed collaboration. The task- and process-focused design of the STS Approach proved especially useful for evaluating the critical impacts of telework for DLA operations and functions. Application of the supporting *STS Toolbox* enabled the Zylter team to tailor analyses and frameworks to identify key trends and actionable recommendations.

Sociotechnical System Description and Key Elements

Organizational work units (e.g., teams) and the processes they execute each constitute sociotechnical systems (STS), as illustrated below. An STS is a set of interdependent capabilities that includes operational methods, the people who use and interact with the system and the technology that supports it. An STS generally includes personnel that collectively make up the workforce. The workforce executes tasks whose execution is governed by an organizational structure that is enabled by technology. All the STS elements are contextualized by an operating environment that includes all the external factors that impact the form and function of the STS, such as facilities and local traffic conditions. The figure below illustrates the key STS aspects.

To learn more about us or our Sociotechnical Systems Approach please go to our website: www.zylter.com/sts-toolbox

Zylter Sociotechnical Systems Approach

Zylter STS Toolbox for Organizational Analysis and Design

The STS Approach is applied through a set of methods and frameworks Zylter has developed and refined through practice. The STS Toolbox provides a simple, comprehensive and flexible vocabulary and resources to characterize STS elements, their inter-relationship and implications of STS changes or additions. STS Toolbox and some associated methods illustrated below:

The following pages present and describe application of key STS Toolbox methods and frameworks applied during Zylter's telework analysis

Sociotechnical Systems Toolbox

ANALYZE	A.1	Use Case Description Framework	A.2	Needs Analysis Framework	A.3	Job Analysis Journey Map	A.4	Task Analysis Framework	A.5	Delivery Option Assessment	A.6	Best Practice Identification
DESIGN	Ds.1	Knowledge Transfer Delivery & Resource Concept	Ds.2	Development Planning Horseblanket	Ds.3	Storyboard Development Structure	Ds.4	Development Plan & Timeline	Ds.5	Design Feedback Platform	
DEVELOP	Dv.1	Development Status Tracking Dashboard	Dv.2	Technical Development Requirements Document	Dv.3	Development Review Working Session	Dv.4	Development Feedback Platform			
DELIVER	Dl.1	Delivery Environment Audit	Dl.2	Delivery Coordination Checklist	Dl.3	Instruction Desk Reference Book	Dl.4	Field Support Kit			
EVALUATE	E.1	Design / Prototype Review Session	E.2	Automated Surveys	E.3	Dedoose Qualitative Text Analysis	E.4	Web-Based Learning Checks & Tests	E.5	Multi-Media Feedback Platform	E.6	Longitudinal Assessment

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STS TOOLBOX RESOURCES FOR TELEWORK PROGRAM ANALYSIS + IMPLEMENTATION

Practical STS Method + Framework: *Supervisor Telework Tool-Box*

Zylter designed this Telework Toolbox for Managers to include the specific policies and resources needed to guide and enable each aspect of telework management by line supervisors. Each toolbox element should correspond to an organization-specific policy or resource to fully enable manager success during dispersed operations.

INITIATE		PLAN	EXECUTE	MONITOR & CONTROL	CLOSE
Position / Role Eligibility Determination	Position Task Assessment	Baseline Plan Development	Work Unit Execution	Monitoring & Controlling	Closing
POSITION ELIGIBILITY DETERMINATION	PRESCRIBED / REGULATORY TASK REQUIREMENTS	WORK UNIT TW EXECUTION PLAN	ROUTINE TASK ASSIGNMENT & EXECUTION	PERFORMANCE MONITORING & CONTROL	TELEWORK REMOVAL
POSITION COMPARISON ASSESSMENT	EXTERNALLY-DRIVEN TASK REQUIREMENTS	COLLECTIVE-TO-INDIVIDUAL TASK CROSSWALK	DYNAMIC TASK ASSIGNMENT & EXECUTION	QUALITY MONITORING & CONTROL	TELEWORK REDUCTION
	PREDICTABLE TASK REQUIREMENTS	TASK SCOPING PLAN		CULTURE MONITORING & AWARENESS	
	COLLABORATIVE TASK REQUIREMENTS	ONSITE REQUIREMENTS SCOPING		UNION NOTIFICATION	
	EXPERIENTIAL TASK REQUIREMENTS	GENERAL TEAM STANDARDS		TELEWORK AGREEMENT CHANGE PROCESS	
	IMMERSIVE TASK REQUIREMENTS	EMERGENT TASK RESPONSE PLAN			
	INFORMATION-HANDLING TASK REQUIREMENTS	PERFORMANCE MANAGEMENT PLAN			
		TELEWORK AGREEMENT MANAGEMENT PLAN			
		CULTURE & TEAM ENGAGEMENT PLAN			
		FACILITIES USAGE PLAN			
		TECHNOLOGY USAGE PLAN			

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Practical STS Method + Framework: Focus Group Collection Framework

Zylter designed and applied the large-format *Focus Group Collection Framework (left)* to collect supervisor input associated with each STS aspect of telework. The framework enabled systematic collection, synthesis and analysis of data from 22 focus groups across six departments. Notes from each completed framework (example at right) were transcribed for further review and analysis. This approach can be applied in person with a large-format poster or virtually using collaboration technologies such as Miro.

Actual Large-Format Poster with Focus Group Comments

STS-Based Focus Group Framework

Practical STS Method + Framework: *Thematic Analysis of Focus Group and interview Responses*

Zylter design this detailed analysis and associated framework to track key themes across 38 focus groups and semi-structured interview responses. This analysis enables the identification of critical cross-cutting issues across a set of focus groups and interviews. The associated framework also allows for identification of other trends and correlations, such as an emphasis on specific themes by sub-organization, location, or other aspects.

Row categories (left axis):

1. TELEWORK PARTICIPATION
- 1.1. Telework Participation Range (in general)
- 1.1. Sweet Spot / Tipping Point (max sustainable days per)

2. TELEWORKING POLICY
- 2.1. DLA Policy & Implementation
- 2.2. Policy Implementation Guidance & Support
- 2.3. Union Influence on Telework Practices

3. OPERATING ENVIRONMENT
- 3.1. Facilities Planning & Design
- 3.2. Geographic Context
- 3.3. Barriers to Access (commuting, etc.)

4. TASKS / PROCESSES
- 4.1. Task / Role Attributes
- 4.2. Importance of Collaboration / Interaction
- 4.3. Customer Support Requirements
- 4.4. Employee Performance Management
- 4.5. Individual Productivity

5. ORG STRUCTURE
- 5.1. Organizational Attributes
- 5.2. Supervisor Role in Teleworking
- 5.3. Organizational Importance of In-Person
- 5.4. Organizational Connectedness
- 5.5. Impact on Culture & Cohesion
- 5.6. Geographic Dispersion of Work Unit
- 5.7. Senior Leader Role in Teleworking
- 5.8. Organizational Productivity
- 5.9. Responsiveness

6. WORKFORCE
- 6.1. Individual Attributes
- 6.2. Perception of Telework
- 6.3. Recruitment & Retention
- 6.4. Work-Life Considerations
- 6.5. Workforce Training & Development

7. TECHNOLOGY
- 7.1. Technology Suitability to Support Telework
- 7.2. Security Considerations
- 7.3. Support Resources (training, IT support, etc.)
- 7.4. Employee Technology Use

Legend:
- Significant issue or factor influencing telework outcomes and impacts
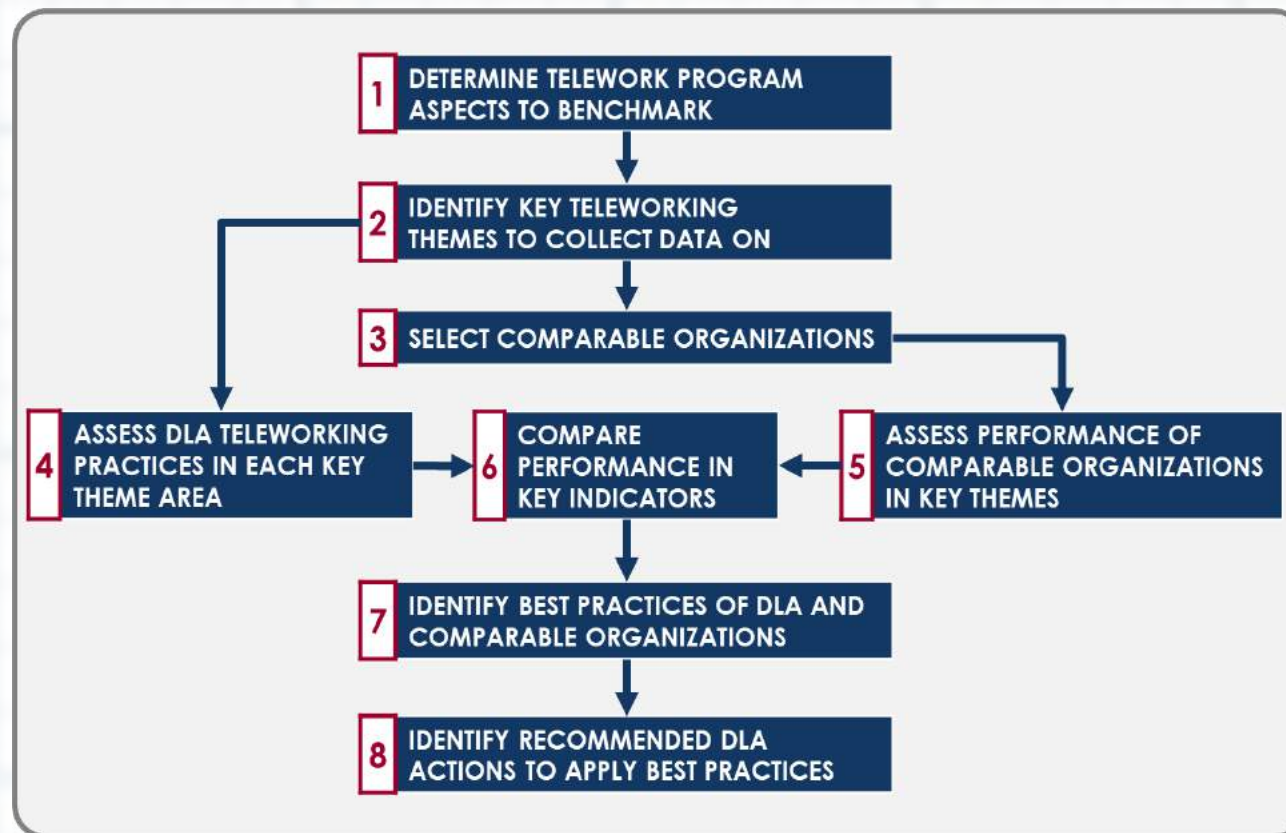- General concern or factor influencing telework outcomes and impacts

Practical STS Method + Framework: Thematic Analysis Summary

Zylter designed and applied this method to summarize the key themes from organizational focus groups and leader interviews by STS Approach aspect. This framework provides both a listing of priority themes and the frequency they were addressed. This provides a qualitative basis to identify and prioritize concerns or issues for an organization to address.

		SUPERVISORS	SENIOR LEADERS
2. TELEWORKING POLICY	2.1. DLA Policy & Implementation	14	8
	2.2. Policy Implementation Guidance & Support	6	2
	2.3. Union Influence on Telework Practices	5	15
3. OPERATING ENVIRONMENT	3.1. Facilities Planning & Design	20	19
	3.2. Geographic Context	25	25
	3.3. Barriers to Access (commuting, etc.)	25	25
4. TASKS / PROCESSES	4.1. Task / Role Attributes	6	11
	4.2. Importantance of Collaboration/Interaction In Task Performance	20	15
	4.3. Customer Support Requirements	9	11
	4.4. Employee Performance Management	6	11
	4.5. Individual Productivity	14	19
5. ORG STRUCTURE & LEADERSHIP	5.1. Organizational Attributes	14	11
	5.2. Supervisor Role in Teleworking	1	1
	5.3. Organizational Importance of In-Person Interaction & Collaboration	22	5
	5.4. Organizational Connectedness	9	2
	5.5. Impact on Culture & Cohesion	3	8
	5.6. Geographic Dispersion of Work Unit	9	19
	5.7. Senior Leader Role in Teleworking	14	5
	5.8. Organizational Productivity	25	19
	5.9. Responsiveness	14	25
6. WORKFORCE	6.1. Individual Attributes	3	25
	6.2. Perception of Telework	9	8
	6.3. Recruitment & Retention	22	5
	6.4. Work-Life Considerations	24	15
	6.5. Workforce Training & Development	3	15
7. TECHNOLOGY	7.1. Technology Suitability to Support Telework	2	2
	7.2. Security Considerations	28	25
	7.3. Support Resources (training, IT support, etc.)	28	19
	7.4. Employee Technology Use	14	19

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Zylter Methodology for Benchmarking Telework

Zylter designed and executed our Benchmarking Analysis Methodology (below) to identify recommendations for DLA's improved management of telework based on lessons learned and the best practices industry from broader industry experience. Each step of the methodology and its application are described in detail below.

Our Teleworking Benchmarking Methodology Steps

1 | Determine Program Aspects to Benchmark:

Providing useful insights requires focusing on the most salient and applicable aspects of teleworking. This benchmarking of teleworking practices will focus on information across the five sociotechnical system- tasks/ processes, organizational structure, workforce, technology and operating environment

2 | Identify Performance Indicators and Data to Collect:

Identifying the specific indicators within each sociotechnical identified in step. These indicators are specific areas that can be characterized and assessed across benchmarked organizations. These indicators can include specific features of teleworking programs requiring both quantitative and qualitative assessment where appropriate.

3 | Select Comparable Organizations:

This step requires identifying, assessing and prioritizing a set potentially comparable organizations. The purpose is to identify a set of government and commercial organizations with similar operating characteristics for detailed assessment and benchmarking. Prioritization requires a weighted assessment of key areas that indicate applicability of and experiences .

4 | Assess DLA in Each Key Indicator:

This step requires describing DLA telework programs and policies in each of the key indicator areas identified in Step 3. This assessment is based primarily on information collected from completed analysis. This assessment provides a base- line for comparison of DLA with the priority organizations identified in Step 3.

5 | Assess Performance of Comparable Organizations in Key Indicators:

This step entails collection and application of information to describe each comparable organization in each of the indicator areas identified in Step 4. Collecting the quantitative and qualitative information needed requires access to policies, data and leader perspectives from each comparable organization.

6 | Compare Performance in Key Indicators:

This step entails looking across a systematic summary of all organization assessments to identify key trends, especially as compared to DLA's baseline. This comparison focuses especially on observed features of comparable organizations that DLA can explore and consider for improving teleworking policies and programs.

7 | Identify Best Practices of the Organization and Comparable Organizations :

This assessment involves identifying best practices from the comparable organizations that can inform DLA teleworking policies and programs. These best practices include specific successful actions demonstrated by comparable organizations, as well as actions suggested by comparable experiences and perspectives.

8 | Identify Recommended Organizational Actions to Apply Best Practices :

This Step includes identifying the specific actions that DLA can adopt to ap- ply the best practices identified from comparable organizations. Identification of the specific actions requires consideration of DLA similarities to and differences from comparable organizations, such as the presence of bargaining units or processes executed.

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Acknowledgments

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