



# citisales Jobs That Work study

## What Types of Management Strategies Promote a Culture of Flexibility for Hourly Workers?

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### INTRODUCTION

One challenging aspect of implementing workplace flexibility within decentralized, retail operations is persuading store managers that workplace flexibility is good for business. Store management may resist offering flexibility because of the time it takes to negotiate schedules or because of concerns about equity among employees. While CitiSales grapples with these and other concerns, the availability of workplace flexibility has become standard operating procedure in many of its stores. Overall, CitiSales promotes the use of flexible workplaces by educating store managers about the value of workplace flexibility and by providing them with the tools necessary to develop, implement and sustain effective flexible workplace practices. Regional vice presidents and district managers encourage the use of flexible work options at the store level as a strategic approach to recruiting, retaining and engaging a qualified workforce. Store managers are thus urged to find creative ways to meet both business objectives and employee scheduling needs.

As described in Issue Brief #3, *Can Business Benefit By Providing Workplace Flexibility to Hourly Workers?*, workplace flexibility at CitiSales provides real benefits to the company. These workplace flexibility practices, especially for hourly workers, are valued by district and regional managers as a means to recruit, retain and engage employees, while also providing the best customer service possible. The challenge then is how to coach store managers and supervisors to create flexible work practices store-by-store without setting up a company-wide, formal policy. This issue brief describes CitiSales' strategies for promoting a culture of workplace flexibility for hourly workers.

### WHAT ARE STRATEGIES FOR PROMOTING A CULTURE OF FLEXIBILITY FOR HOURLY, RETAIL WORKERS?

CitiSales incorporates an array of store-level management strategies to endorse a culture of workplace flexibility for hourly workers. These strategies are categorized into two primary areas:

## About this Issue Brief

This issue brief describes management strategies for promoting a culture of workplace flexibility for hourly workers in a large U.S. retail store, referred to as CitiSales. The quotes in this brief have been taken from interviews with CitiSales regional vice presidents and district managers that were conducted as part of the study.

The research question is:

- What are strategies for promoting a culture of workplace flexibility for workers in hourly, retail jobs?

- providing store management with the knowledge and resources necessary to use flexibility as a tool to meet business goals
- promoting employee participation in the process of creating a culture of flexibility

### **I. Providing store management with the knowledge and resources necessary to use flexibility as a tool to meet business goals.**

CitiSales district managers identify three primary strategies to engage store-level managers in the use of workplace flexibility for hourly workers:

1. Inform store-level management about the business advantages of promoting flexible work arrangements
2. Give store managers the ability to institute flexible practices based on the needs of the individual store's available labor force, community and customers
3. Teach store managers to develop creative strategies to address challenges to the ever-changing process of employee scheduling

In practice, these strategies are inextricable. They are separated in this brief to provide a better understanding of the meaning and practice of workplace flexibility within CitiSales.

➤ *Inform store-level management about the business advantages of promoting flexible work arrangements.*

The culture of flexibility at CitiSales rests on an understanding that to attract a quality workforce in a 24/7 retail environment, store-level management must have a finger on the pulse of their employees' diverse scheduling needs as well as the business needs of their individual store. To promote the use of workplace flexibility, CitiSales provides store-level managers with information about the business benefits of offering workplace flexibility including information about its value to employees, its impact on employee engagement, and the impact of retention on the bottom line. Additionally, time is often set aside during regional meetings for store managers to discuss the challenges associated with employees' diverse scheduling needs and ways to leverage this

diversity as a business asset. CitiSales strives to educate store managers on how to use hourly employees' needs for certain work hours, work locations, or amount of work hours in a week as opportunities to fulfill their stores' business needs. One manager's point of view was expressed in the following statement:

"...the reward that we receive is greater than the cost associated with it. [The reward is] we have employees who feel better about their job. They understand that we're going to work together to accomplish what we need to accomplish and that makes for a happier employee who's going to do a better job for us and be more willing to focus on the things we're asking them to focus on."

➤ *Give store managers the ability to institute flexible practices based on the needs of the individual store's available labor force, community and customers.*

Flexibility practices range from allowing seasonal workers to shift between regions, splitting an employee's weekly hours between two stores or simply honoring the preference to work during day or evening hours. These practices help the company by increasing loyalty among CitiSales employees, and help the employees by providing them with schedules that best fit their life circumstances.

District managers describe a variety of strategies for offering flexibility to employees. The use of flexible work solutions as a strategic business practice starts at the top of the retail management team. Regional managers challenge the district managers to "be the CEO of their individual span of control." That is, they encourage district managers to create workplace practices that are best for their distinct stores.

District managers, in turn, encourage store-level managers to use any means available to recruit and retain top hourly talent. Thus, district managers give store-level managers the ability to institute flexible solutions that suit their individual store's available labor force, community and customers. For instance, while one store may give employees set weekly schedules, another store may find that rotating schedules are a better fit.

"We try to stay away from a broad-based philosophy, and let it drill down into the district manager level in which they have much more face time and interaction, so we try to challenge them to be the CEO of their individual span of control. And you know, get that information, and create that environment down to the employee level."

➤ *Teach store managers to develop creative strategies to address challenges to the ever-changing process of employee scheduling.*

Providing store managers the resources to adequately respond to ongoing scheduling demands is a critical component of integrating workplace flexibility into business practice. At CitiSales, store managers are not only taught the business side of the scheduling, such as how each store is assigned a set of hours and positions, but they also learn to simultaneously consider the employees' needs when developing the store schedule. Additionally, district managers provide a venue at regional manager meetings to discuss scheduling strategies, whereby store managers share practices that have been successful within their individual stores.

"...we have a schedule module as part of our training program... but the nice thing is that it does not end with just the phase one part of the training. ...we talk about it in our regional meetings."

## II. Promoting employee participation in the process of creating a culture of flexibility.

Store managers engage hourly employees as partners in and contributors to creating flexible work options, rather than more traditional approaches which hold employees accountable for following strict protocols to access flexible work options. CitiSales uses three key strategies to engage employees in the scheduling process as a way to maximize flexibility.

1. Allow employees to request regular schedules
2. Create formal procedures for schedule requests
3. Develop a standard process for just-in-time schedule changes

➤ *Allow employees to request regular schedules.*

The around-the-clock nature of CitiSales hours of operation along with the diversity of today's workforce create an opportunity for a broad range of workplace schedules. At CitiSales, customers come first; and prior sales data drives scheduling budgets. While these business factors are of primary concern, they do not need to exclude employee schedule preferences. Store management teams are encouraged to develop formal processes for taking employee schedule requests. As noted in Issue Brief #2, *What is Workplace Flexibility for Hourly, Retail Workers?*, there are two types of schedule requests at CitiSales—those for a standard weekly schedule and those for planned timed off. Managers report optimal customer satisfaction and business outcomes when store managers and employees collaborate in balancing business concerns with employee availability and scheduling preferences.

Managers report several strategies for blending business needs with employee input into schedules. These include:

- Be clear about the scheduling requirements during the interview process with prospective employees
- During the interview, ask prospective employees for their scheduling preferences as well as scheduling restrictions, days or shifts that they are unavailable
- Revisit employees' scheduling preferences once employees are hired
- Inform employees about the options for last minute schedule changes

"Basically, when you're interviewing, you find out what the availability is of the employee and [whether] the availability will work into the store business. If it does, then we try to be as open — and have as open availability as possible. If we know that Johnny goes to school on Tuesday and Thursday, then we wouldn't schedule Johnny on Tuesday and Thursday. And if you're open — if you have open availability, then you're scheduled whenever."

➤ *Create formal procedures for schedule requests.*

Allowing employees some control over their scheduled work times requires that employees be responsible for providing managers with their schedule preferences prior to schedule development. It also requires that store managers create a formal procedure for accepting employees' schedule requests.

To optimize the success of the store's individual procedure for schedule requests, CitiSales managers suggest the following:

- Create a system where employees can submit schedule preferences to store manager. For instance, some managers ask employees to fill out a request form and then give it to the manager two weeks before the schedule is created. Other managers ask that all schedule requests be submitted via email. Whatever the system, it works best when managers are consistent and adhere to protocol.
- Provide written guidelines at the time employees are hired that stipulate the scheduling procedures, how to make schedule requests, and specify a timeframe for when requests need to be made.
- Provide written guidelines as to how managers make decisions about scheduling preferences. For instance, are schedule preferences honored by seniority, by the order in which they are received, or by some other manner?

➤ *Develop a standard process for just-in-time schedule changes.*

While employees and managers can plan ahead to ensure optimal scheduling for the store and the employees, unexpected events are inevitable. Thus, it is important to have a process in place for employees to change their schedule after the schedule has been posted. As illustrated in Issue Brief #3, *Can Business Benefit By Providing Workplace Flexibility to Hourly Workers?*, there are two forms of just-in-time schedule changes at CitiSales: employee-generated schedule coverage and shift-swapping. To ensure that the store operations are covered, it is important to have clear standards for how these two practices work.

CitiSales store managers consider the following guidelines when considering just-in-time schedule changes.

- Who is responsible for finding shift coverage, the employee requesting time off or the manager?
- What happens if the employee cannot find someone to cover the shift?
- What criteria must be considered when finding someone to cover a shift? Does the person covering the shift need to have the same training as the one requesting time off?
- Once a co-worker has agreed to work in place of the employee, whose responsibility is it to inform the manager of the schedule change?
- Employee-generated schedule coverage assumes that a co-worker will cover the employee's shift. Another question to be considered is whether or not the employee requesting time off forfeits the hours originally scheduled.
- If an employee requests that a co-worker cover a shift, what are the implications for his/her eligibility for benefits?

"... I don't think it's that difficult. I think if they're [employee] organized enough to put down their information... then it works... they've got to play a role in it. They've got to take an active role in setting up schedules, planning ahead, and then they've got to do the right things around dealing with their peers and swapping shifts when something unexpected comes up."

"We try to encourage them to be problem solvers so they can first check with their fellow co-workers and come up with a solution. Great. If that doesn't work, yes, then they need to go to their team leader."

Competition for a qualified hourly workforce is fierce. Cultivating a culture of workplace flexibility for retail hourly workers in front-line jobs is one strategy to gain recognition as an employer of choice in the community. *CitiSales Study* findings illustrate that workplace flexibility is one dimension of quality employment for hourly workers that contributes to employee engagement, customer satisfaction and business success.

## ACTION STEPS



### **Educate front-line managers and supervisors about the business benefits associated with workplace flexibility.<sup>1</sup>**

Train front-line managers and supervisors what workplace flexibility is and is not, what the business benefits are, and what key strategies for the implementation and management of flexibility are. While some front-line managers may intuitively understand the need for workplace flexibility, others may prefer to adhere to more traditional operations. Thus, not only is it important to provide front-line managers with information, but they need "how-to" tools and resources to support their efforts. CitiSales has been largely successful in providing time during front-line manager and supervisor staff meetings for discussions about the management of flexibility. This tactic encourages peer-to-peer learning, provides opportunities to problem solve difficult scenarios, and gives the message that workplace flexibility is a workplace solution sanctioned by management.



### **Ask employees to participate in identifying, developing and implementing flexible work solutions.**

Solicit employee input to the types of flexible workplace solutions that may work best for their store location, workforce and customer needs. Employees will inevitably have a perspective unlike that of store-level management, as they are working with customers, know their own and their colleagues' work-family circumstances, and generally understand the day-to-day operations in a way that management may not. Asking for employee participation also encourages buy-in to the scheduling process, and gives the message that management cares about employees' lives outside of work.



### **Pilot test workplace flexibility initiatives.**

Once workplace flexibility initiatives have been identified, consider a pilot test to determine whether the strategy suits business, customer and employee needs and expectations. Set a designated time to try the initiative, and

then evaluate the situation. If possible, identify outcomes that can be measured to ascertain the extent to which the flexibility initiative is the right fit for your organization. Recognize that the roll-out of initiatives may vary across stores, or by employee.



### **Create policies, processes and procedures for managing workplace flexibility.**

Develop policies and guidelines for processes and procedures relevant to flexible work initiatives. Flexible work processes and procedures should be developed with employee input. Once they are defined, inform employees, including new employees and employees who may float from another location. Post them in clear, visible locations as ongoing reminders.

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<sup>1</sup> This assumes that senior-level management sanctions the use of workplace flexibility. If senior management is not yet on board with workplace flexibility, see action steps at the end of Issue Brief #3, *Can Business Benefit By Providing Workplace Flexibility to Hourly Workers?*

## About the CitiSales Study

The data presented in this brief are part of a larger, multi-method study which examines the individual and organizational effects of quality workplace practices for employees in hourly, front-line retail jobs and for older workers in professional and hourly jobs in the same organization. The study was conducted in collaboration with a *Fortune 100* retail firm referred to as “CitiSales.” The company operates over 6,000 stores throughout the United States. Survey data were collected in 2006 from 6,085 employees within 388 stores in three geographical regions of the U.S.; 72% of employees surveyed responded. The hourly worker sample is 3,903. See Issue Brief #1: *Introduction to the CitiSales Study* for a detailed description of the hourly worker sample. Qualitative data were collected from 38 district managers and three regional vice presidents overseeing the operations in these stores.

*Sample and Methods:* Findings presented in this issue brief were gleaned from the qualitative interviews with senior management. Interviews were conducted in-person or by phone. Senior management were asked open-ended questions about managing an hourly workforce, types of flexible work options available to hourly workers at CitiSales, scheduling of hourly employees, and cost/benefit of offering flexible work options. Transcripts from the interviews were systematically coded and analyzed by the research team. For further details about the research methods, please contact Dr. Jennifer Swanberg at [jswanberg@iwin.uky.edu](mailto:jswanberg@iwin.uky.edu) or Dr. Jacquelyn James at [jamesjc@bc.edu](mailto:jamesjc@bc.edu).

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## About the Research Team



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workplaces as a business and work-life effectiveness strategy, access to workplace flexibility among under-represented working populations, and the use of human capital and quality employment as a form of economic development. Dr. Swanberg’s research has been published in top-tier research journals, and she has appeared as a national and international work-family expert on television and radio including MSNBC, CNN, CBS, NPR, and BBC. She has been recognized by Alliance of Work-Life Progress as one of the profession’s Rising Stars, and her research has been recognized as among the top research articles by the Rosabeth Moss Kanter Award for Excellence in Work-Family Research.

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of Lives at Harvard University. Her research has focused on the meaning and experience of work in women’s lives, gender roles, and adult development. She and her colleagues have published numerous articles, opinion pieces, and four edited books. The most recent volume (with co-author Dr. Paul Wink, professor of psychology at Wellesley College), *The Crown of Life: Dynamics of the Early Postretirement Period*, is about the opportunities and challenges inherent in the early retirement years for new generations of retirees. Dr. James is past-president of the Society for the Study of Human Development and serves on the editorial board of the society’s flagship journal, *Research in Human Development*.

**Mac Werner, MSW** works at the University of Kentucky Institute for Workplace Innovation as a research associate. He has a B.S. in business from the University of Evansville, an MSW from the University of Kentucky and is currently completing course work toward a Ph.D. in social work. His background includes over a decade of experience as a small business owner and substantial experience in program management and design. Over the past four years, he has worked extensively in the field of social science research, focusing on program evaluations in the criminal justice and child and family welfare systems.