



## How to build a hybrid working strategy: a ten-step guide for charity CEOs

Covid-19 has caused seismic changes in the way we work. Within days in Spring 2020, most organisations had to shift quickly and without warning to working entirely remotely. At this point in time, some employees remain at home, but many are following some form of hybrid model: working part of their week in the office, and part remotely. How far back to ‘normal’ pre-pandemic office life we’ll eventually go is difficult to predict. But there’s little doubt hybrid working will remain more common in the post-Covid world.

It’s an issue worthy of a strategic approach. Changing the way we work has the power to shift an organisation’s whole culture, so planning and forethought are crucial. Decisions made about remote working will impact everything from how we attract and retain talent to how we collaborate and make decisions. Recognising this and putting time into developing a hybrid working strategy will be a key leadership task for CEOs through 2021 and 2022.

However, the biggest mistake we can make when crafting our strategy is to see this as a one-off process, and leaders will be best served by taking an *emergent* approach. Emergent strategy is the deliberate and considered tactic of learning what works in practice and evolving to meet those needs. It is an explicit acknowledgement that ‘we don’t know’ and can require a shift in how we think about high-level planning and leadership.

So where do we begin? The ten-step guide below will help.

### **1. Ask staff (and ask again)**

Canvassing all employees regularly and sensitively about hybrid working is crucial to the ongoing development of a strategy that best works for everyone, as there will inevitably be differences relating to age, life situation, length of employment and many other factors. A combination of surveys and interviews will work well to understand staff experiences and opinions. Research has indicated that as we emerge from the stress of Covid, *many employees are re-evaluating their relationships with work and aren’t yet sure what they want over the longer term.* We’ll want to keep asking for feedback, signal that we’re aware there is a deeper undercurrent of beliefs that will take time to surface and that we are clearly committed to listening for and acting on these signals.

**Question: What feedback methods will you use and how often will you ask?**

## **2. Experiment and track findings**

A key part of an organisation's emergent strategic approach should be to explore, experiment and learn, adjusting and evolving what hybrid working looks like as time progresses and be open to changing our approach based on feedback and evidence about what's working. As such, it's helpful to promote openness, curiosity and a test-and-learn mindset amongst the team. We can try out different working models and norms, physical-space layouts and tools, to balance individual productivity with innovation, personal flexibility with team collaboration, and office with home. Actively encourage managers and their teams to develop and test new approaches with full 'permission to fail.' Deciding how to measure the success of these experiments is important. Employee satisfaction with a policy may not be the best measure and productivity can be difficult to gauge. However, employee engagement can be a good measure as this often correlates with a variety of organisational outcomes, including impact, retention and performance. These UWES-9 employee engagement survey questions [here](#) may be helpful to help measure success.

***Question: How will you promote experimentation; what metrics will you track and how?***

## **3. Consider how to 'orchestrate spontaneity'**

A huge value of the office is the potential for informal spontaneous conversations that lead to connection, creativity and efficiency. However, we need to be clear-eyed when recalling how much of the full-time office day was actually spent head down on email or in structured meetings, and where the office bred gossip and rumour as much as fabulous ideas and insights... So how can we create the conditions for moments of positive productive serendipity to happen in a hybrid working set-up? The keys are designing in slack capacity and overlap of availability.

***Question: how might you productively bring people together with no set agenda, either on or offline?***

## **4. Design for equity and inclusion**

Hybrid approaches can throw up barriers to inclusion and inequities around performance and career trajectory. Research shows that 'passive face time', merely being observed at work, boosts someone's chances of promotions and pay rises. This means that remote staff are more likely to get passed over for opportunities simply because their managers don't see them in person. Groups more likely to work remotely such as working mothers, those living further away (often in rural areas) or with health issues may be side-lined.

***Question: How will you integrate principles of equity and inclusion across your strategy and policies?***

## **5. Rethink learning and skills development plans**

Hybrid working can mean younger and newer employees lose opportunities to learn informally alongside more experienced colleagues.

The role of the manager becomes even more important in hybrid work. Many managers, and team members, would benefit from training in relational skills known to enhance remote work, including establishing team working norms, building trust, effective virtual communication patterns, and incorporating social elements into virtual work relationships.

**Question: How will you adapt your team learning and CPD plans to take account of these new requirements?**

## **6. Consider how to strengthen team cohesion and psychological safety**

High-performing teams have a sense of psychological safety, where employees feel they can speak up, ask for help and offer ideas, expecting to be positively and respectfully received. Psychological safety is especially valuable in the remote work environment, and even small amounts of high-quality social interactions, such as those demonstrating vulnerability, inclusivity and compassion, can lower stress and improve well-being. Asking genuinely curious questions and taking a 'fail forward' approach to managing risk and performance is also highly valuable. Repeated occurrences of these positive interactions throughout the day can provide a sense of belonging, mitigating the feelings of isolation often associated with remote work.

Self-care and boundary setting are key enablers to developing this supportive effective culture; we need to feel resourceful enough to take time to create these safe spaces. As such, the biggest difference that leaders can make is to model care for themselves as well as for others and 'walk the talk' in this arena.

For teams of all sizes, it can be helpful to clarify values, roles, strengths and expectations with a team charter such as at <http://theteamcanvas.com/>

Despite any initial eye-rolling, it also helps to plan fun and team-building activities, there's a long list [here](#) to inspire.

**Question: What steps can you take to strengthen organisational well-being?**

## **7. Decide when and how to meet**

This is central to organisational culture and so it's worthwhile reflecting on the nuances of when and how to meet. Digital fluidity refers to the organisational ability to work effectively across a mix of virtual or in-person environments,

to choose the most appropriate format, or mix of formats, for any activity. High fluidity will improve efficiency and effectiveness - and will involve some skills building. Consider implementing decision-making guidelines across the organisation to help staff choose the right tool(s) for the job. The resource [here](#) may assist.

Some organisations are saying that they will gather in person for divergent thinking and use Zoom/Teams calls for convergent thinking. Convergent meetings are about information exchange and shared understanding or allowing disparate viewpoints to converge on one decision. Divergent meetings are about creating new ideas, imagining and brainstorming.

Generally, challenging or complex group conversations are best in person, but it's worth noting that an advantage of the online format (used well) is that it can be a great equaliser, softening dominating effects of hierarchy and extroverted behaviours. So when the view of 'quieter' team members needs to be heard consider carefully facilitating an online call.

Rather than defaulting to meet at the same time, explore the benefits of asynchronous working, particularly for sharing information e.g. 'weekly updates' in written form, via video (try <https://www.loom.com>) or audio (<https://otter.ai> also transcribes.)

Online whiteboarding via MURAL <https://www.mural.co>, Jamboard, Miro or similar can be used for both simultaneous and asynchronous brainstorming and can be used to make collaboration more inclusive for more reflective or introverted members of the team.

'Zoom Fatigue' is definitely A Thing. More on how to combat it here: <https://news.stanford.edu/2021/02/23/four-causes-zoom-fatigue-solutions/>

A quick wellbeing win can be to default meeting times to multiples of 25 minutes, (50 mins, 75 mins etc) to help build in buffer time between calls. As we test new approaches to collaboration it can be worth taking a short poll after each meeting to understand the team's experience of the format and whether it was 'fit for purpose.'

**Question: What tools and guidelines will you put in place to support decision making about when and how to meet and collaborate?**

## **8. Resourcing**

Hybrid working needs a different allocation of resources to an office-based model. Although there could be rental cost savings, organisations may need to invest in new or upgraded technology, both software and hardware, that supports digital fluidity, wellbeing and efficiency.

We may also want to consider upgrading our office environment to create conditions that facilitate creative collaboration, networking and team bonding. Giving a team a budget and asking them to speak with colleagues and propose ideas to develop the space can be an enjoyable collaborative project.

With staff working from home, expenses may be incurred to facilitate informal networking and socialising in support of team cohesion and productivity.

In developing the strategy and inform longer-term decision making, we should also consider the environmental impact of different work patterns. It's [complicated](#) but an important consideration.

***Question: What will be the budget and resourcing implications of the strategy?***

## **9. Consider how to engage the Board**

A huge amount of change has happened over the past 18 months, including our understanding of how we manage risks and opportunities. As CEOs, we will want to think through how to engage the Board, as they need to be comfortable with a hybrid working strategy that will emerge over time from experimental testing and feedback.

***Question: How will you engage your Board in this conversation?***

## **10. Culture**

I hope that what is emerging here is that a hybrid working strategy is about consciously co-creating organisational culture with our teams. It will depend on our ability to reconcile the “hybrid paradox,” as many people want both the flexibility to work from anywhere, but also more in-person connection. The greatest outcomes will unfold where we focus on understanding how to forge a collective identity amongst colleagues, irrespective of where work is done.

***Question: Is this emergent hybrid working strategy helping to build an even more positive, cohesive organisational culture?***

## **Conclusion**

We may not know for 12 to 24 months what ‘returning to work’ really looks like. We have a unique opportunity to embrace this growth challenge with curiosity and a willingness to learn together to discover new and better ways in which to work and support the communities that we serve.