

Flexible and hybrid team protocols: What will work for your team?



Resources for SMEs

Flexible working works best when it is flexibly applied. What does this mean? It means when the members of a team are trusted to interpret the organisation's flexible working policy and given the autonomy to apply it to their own circumstances. Each person's need for flexibility will be different, and will itself vary with workload, current priorities, what is happening outside work, the demands of any family responsibilities.

But colleagues can have concerns about the impact of flexible working, even if they would like greater flexibility themselves. For example, people worry that they will end up covering for colleagues who work flexibly. Good communication and trust within the team are important in overcoming these fears. Taking a more team-based approach can also be valuable, with the whole team encouraged to work together and take responsibility in getting the work done in a way that works for every team member.

Lead your team in defining their business needs and the kinds of flexible working which are appropriate to support their own high performance.

Agree flexible working protocols

Protocols are a useful tool for managing staff who work in a non-traditional way. They form an informal agreement between team members, including home workers and line managers, on matters such as availability by phone/Zoom, response times and diary management.

Each team should have its own set of protocols addressing its unique circumstances. Your starting point is your organisation's headline policy on flexible working. There are four areas to think about, in terms of how your team will make it work for them:

1. Availability and contactability
2. Communication
3. Wellbeing
4. Technology and environment

The following notes are suggestions for guidance. You and your team will quickly be able to adapt this approach to design an agreed set of protocols which suits your particular situation. Note, do not draft these on your own. Turn the questions over to your colleagues and take advantage of their collective wisdom to craft solutions which suit your team, and whose success its members will take responsibility for.

Availability and contactability

Availability

📌 Who needs you? For example:

- External clients or customers
- Internal colleagues or clients

📌 When do they need you? For example:

- Do you have formal, public opening hours?
- Does your team support or collaborate with people in different time zones?

📌 Does your team or the organisation have an agreed or required response time for internal or external customers or clients? And within the team, between colleagues?

Contactability

📌 How will you know where your colleagues are, and whether they are free for a quick word, or for a formal meeting?

Example

📌 Colleagues working at home, whether on an ad hoc basis or contractually, should be available to colleagues during normal working hours [define these], unless their contract specifies different start or finish times [which might be the case for someone on a part-time contract, for example].

📌 There is no expectation that you will work outside your normal working hours, for example evenings or weekends.

📌 We will include our usual working hours in our email footer.

📌 Colleagues must ensure that their Outlook calendar is up to date at all times.

📌 Private appointments must be notified to your line manager and included in your Outlook calendar as 'private appointment'.

Communication

📌 How often does your team need to get together?

- Formally?
- Informally? (If your team is going to be less frequently physically all in the same place, you may want to plan a monthly or quarterly lunch together, or team building hour.)

📌 What is the rhythm of the work week or month? Do you have anchor meetings, sales meetings, planning meetings when it is important that everyone takes part in person?

- Remember that team democracy may not equal inclusion. The majority may, for example, vote for a weekly planning meeting at 9am every Monday, but this may exclude or be very hard to attend for someone with a child at primary school.
- Consider agreeing core hours for meetings, e.g. between 10am and 3pm, to enable everyone to manage their working hours without conflict with their lives outside work.

📌 What kinds of meetings are suitable for someone to take part in remotely? What requires face-to-face participation?

- How much notice will you give each other? Someone who is generally office-based will need only to check their diary for a core hours meeting, while a colleague based off-site, or who works full-time at home, may need longer notice to arrange to travel or childcare.

📌 How do you want to keep in touch with your direct reports? Whose responsibility is it to keep in touch with whom?

Examples

📌 Monthly team meetings must be attended in person; dates will be set [specify how many] weeks/months in advance.

📌 We will not ask colleagues to attend meetings which begin after 4pm.

📌 Colleagues who work offsite must take responsibility for regular communication with their line manager and with the rest of the team, using phone or Skype/Zoom/Teams/FaceTime [specify your organisation's preferred communication tools].

📌 We will not burden each other's email inboxes with 'quick' notes – we'll phone or Skype/Zoom/Teams [specify].

📌 Colleagues working offsite will schedule in a quick weekly catch-up call with their line manager.

Wellbeing

Many people value working in a team, and in the same place as their colleagues, because of the ease of social interactions and also the natural time management which comes from aligning with the patterns of the organisational day. Team members who are based at home,

on the road, or with clients, may feel isolated, and/or more driven to achieve in case they are judged by their absence.

Think about:

- 📌 When to take breaks
- 📌 How to keep in touch and up to date
- 📌 How to feel part of the team

Examples

- 📌 If you are working at home, make sure you take regular breaks to maintain your concentration.
- 📌 Make sure you schedule in regular 'water cooler' moments with colleagues to guard against isolation – and to share ideas and keep your thinking fresh. Colleagues commit to welcoming calls from others who are offsite.
- 📌 Use phone and Skype/Zoom/Teams/FaceTime [specify] rather than email.
- 📌 Flag up with your line manager if you find yourself feeling disconnected from the team.

Technology and environment

This is not just about what needs to be in place for colleagues working occasionally or permanently from home. It is a chance for the team to think about how technology can be harnessed to enable them better to deliver their objectives. Think about:

- 📌 whether the organisation's existing technology will support the way you want to work. Where there is a lack (for example, can everyone access files remotely, or do they have to email their work to themselves?), this may indicate an area to be suggested for future development with HR or the CEO.
- 📌 whether colleagues understand the organisation's remote or home-working policies.
- 📌 whether there are any risks to your business, for example, around client confidentiality, from working from home or outside core hours?

Examples

- 📌 Homeworking must be safe, secure and confidentiality must be maintained. Colleagues need to self-certify that this is the case.
- 📌 Working remotely on an ad hoc basis may be done only if adequate technology is available (for example reliable broadband connection where you intend to work). This

is your responsibility unless you are contracted to work remotely or from home.

- Working from home is not a substitute for childcare or any other form of care. If your care arrangements have broken down, you should make appropriate leave arrangements with your line manager.

Keep it under review

Your protocols are not set in stone. Things change. Agree with your team that you will keep talking and keep how you work under review – your arrangement will doubtless require tweaking as you go along. This is especially important when you first start working flexibly, whether as a whole team or only a couple of team members. Some managers have found it useful to programme in specific review dates – for example, every six months. This allows the team to respond to changes in the business, and to changes within the team. Such agility underpins successful flexible working and consolidates the new culture.

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