

Bringing service to life



Acceptance Management: The TIAA-CREF Telework Implementation Case Study

Presentation to
2011 Telework Advocacy Summit

Presented by
Tim Lorman, Program Manager
Alternative Workplace Design and Implementation Strategies

September 2011

Our Roadmap

- About TIAA-CREF
- Building the Business Case for Acceptance
- Building the Implementation Team
- Flavors of AWS
- Testing and Expanding the Concept
- Metrics of Success
- The Benefits of Acceptance
- What we would do again and what we would do different...

About TIAA-CREF

- 90 year old financial services company
- 8,000 employees and 1,500 contract workers
- 2M square feet of office space in the US
- \$2B in annual operating costs
- Headquarters in New York City and hub locations in Denver CO & Charlotte NC
- ~70 regional offices



Building the Business Case for Acceptance

- Current State and Historical Information
- Best Practices Research
- Performance Management
- Cost Analysis Information
- Additional Benefits/Cost Savings
- Proposed Policy and Protocols
- Recommendations
- Pilot Program Goals and Timeline
- Next Steps and Timeline
- Size of the Opportunity

The “You’ve GOT to be Dreaming” Team

TIAA-CREF formed a team to develop the AWS concept. The team comprised of directors from:

- IT (network access/equipment provisioning/tech support)
- Corporate Services/Space Planning
- Compliance
- HR
- Learning & Development
- Risk and Business Continuity
- Info Security

The Flavors of AWS

AWS-FLEX (Part-Time): 1-3 Days per Week

Equipped with resources to work remotely, including home office technical equipment and connectivity service reimbursements.

Has an assigned shared 'hotelling' workspace.

AWS-REMOTE (Full-Time): 4-5 Days per Week

Equipped with resources to work remotely. Provided home office technical equipment, furniture (chair/desk) if needed and connectivity service reimbursements.

Has NO assigned workspace.

Testing the Concept

In 2008, we conducted a pilot to test our ability to successfully train, provision and support employees working outside of the office on a regular basis.

Three goals for the pilot:

- | | |
|--------------------------------|----------------------------|
| • Goal for participation – 150 | Actual participation – 188 |
| • Goal for retention – 75% | Actual retention – 95% |
| • Goal for satisfaction – 65% | Actual satisfaction – 87% |

Expanding the Concept

In 2009, TIAA-CREF expanded the concept using “Advance Teams”.

- The Advance Teams were subsets of a business units population comprised of individuals that volunteered to participate in the program.
- The Advance Teams began entering the program in waves, enabling us to manage the deployment of training, equipment and support.
- In addition, the wave deployment enabled us to leverage lessons learned and resolve unanticipated issues for subsequent waves.

Building the Community

- Monthly Community Conference Calls
- CSR “Community Service Representative” Helpdesk
- Special IT Helpdesk
- Resource Center Intranet
- Community Town Halls
- Buddy program

Metrics of Success

Each year, the AWS Team conducts two surveys to assess employee's and manager's satisfaction with their participation in the AWS program.

Program Satisfaction

- Employee satisfaction with program is 96%
- Manager satisfaction with the program is 89%

Employee Perception

- 97% of employees feel that they are able to collaborate and communicate effectively with others while working remotely.
- 97% say that their manager has been supportive of their work arrangement.

Metrics of Success

Manager Perception

98% of managers feel employees are accessible while working remotely.

93% feel performance level of their direct reports have not declined while working remotely

95% feel that communication remains effective.

Forced Participation

12% reported (managers -17%, employees – 11%) feeling they had no choice but to participate in AWS. During the spring survey, 32% of managers and 14% of employees felt they were forced into the program.

Although 12% feel that they were forced to participate, a small percentage (1%) would prefer to no longer participate.

The Benefits of Acceptance

Since then, TIAA-CREF's AWS resulted in:

- The ability to recruit employees not living in “hub locations”
- The ability to recruit teams instead of just individuals
- Retain employees that left “hub locations” due to life change issues
- Sunset retiring employees to prevent sudden loss of intellectual capital
- Operate without interruption during numerous weather induced office closures
- 20% reduction in annual rent and occupancy costs (~\$19M)

What we would again and what we would change

Based on what we now know, here's **what we would do again:**

- Build a community
- Identify & empower an internal program leader
- Forge a partnership with IT, Human Resources and Corporate Real Estate
- Identify a leadership team of stakeholders
- Committed to provision the resources (equipment, training and support) necessary for employees and managers to succeed
- Engage with experts on the development of the program

...and **what we would do different:**

- Formally assess the opportunity and determine the cultural readiness
- Implement a tool/process to enroll employees in the program before the pilot began
- Focus more on resources and services, and less on “program” development
- Address needs of legacy remote and mobile workers sooner