

# TWEAK IT

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SMALL CHANGES, BIG IMPACT

MAKE WHAT MATTERS TO YOU  
HAPPEN EVERY DAY

CALI WILLIAMS YOST



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New York Boston Nashville

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*For Andy, Emma, Maddie, and everyone who shared  
their work+life “fit” stories with me over the past seventeen years.  
You are my inspiration.*



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# *Introduction*

## *Seven Modern Truths about Work and Life*

Learn to live small and you will discover great pleasures. You will accomplish more in your life than you could ever predict if you were overly ambitious.

—Thomas Moore

Work and life. As recently as twenty years ago, the rules that we all followed about when to work and when to manage everything else in life were pretty clear. Then the boundaries began to blur and the rules started to change. Unfortunately, someone forgot to send the memo with the new guidelines. Every day, we struggled to answer questions like:

Do I:

- leave work a few minutes early to get to the gym, or prepare for a meeting?
- work from home in the evening to catch up on e-mails, or meet a friend for coffee?
- cover a coworker's shift, or shop for food for the week?
- ask for overtime, or take my mother to the doctor?
- catch up on paperwork, or read at my child's school?
- go to a lunchtime networking event, or balance my checkbook?

What if I told you there was a better way? The *Tweak It* practice outlined in this book will make what matters to you happen. This simple weekly routine of small, deliberate choices, or “tweaks,” will build the foundation of contentment, well-being, and order you crave, one step at a time. Imagine, if over one year, you managed to do your job but also:

- enjoyed lunches and a cup of coffee with your friends;
- updated your online professional profile on LinkedIn and attended a few networking events;
- kept track of your checking account and credit card purchases;
- took each of your kids to lunch or the movies one-on-one;
- made sure your backup child care for the summer was in place *before* the last day of school;
- completed an online course to learn a new skill for your job;
- sent out presents and birthday cards on time;
- ate mostly healthy, simple meals;
- had a few date nights with your spouse or partner;
- made it to your annual physical;
- had your car serviced so it didn’t break down from preventable problems and require costly repairs;
- took a walk with a group of friends or your dog a couple of times a week;
- got your hair cut regularly so you felt good about the way you look; and
- scheduled and took a vacation that let you disconnect the way you want to.

You can. How do I know? For almost two decades, I’ve been on the front lines creating new, more modern and flexible ways of managing work and life. I’ve worked with tens of thousands of individuals and hundreds of organizations, including JPMorgan Chase, JCPenney, Ernst & Young, the U.S. Navy, and the United Nations.

I've given individuals the tools to create successful flexibility plans that change the way they work (through telecommuting or more flexible hours) in order to manage their lives off the job. And I've shown organizations how to use these same flexible work solutions to make their business more productive, save money, and provide better customer service.

Over those years, I've learned seven truths about work and life in our modern, hectic world. These truths challenge many of our long-standing, core beliefs. The first three emerged as I began to study work+life issues in the early 1990s and continued up to the publication of my first book, *Work+Life: Finding the Fit That's Right for You* (Riverhead), in 2004. But as I promoted that book, I became aware of an important piece missing from the work+life puzzle. This discovery led me to the last four truths and, ultimately, to the *Tweak It* practice you'll find in these pages.

Before we go any further, it's important to note that *Tweak It* doesn't let employers and the government off the hook. Flexibility in the way work is done is critical if we—corporations, government, and individuals—are going to compete and succeed in today's highly competitive, 24/7 global economy.<sup>1</sup> Therefore, employers have to create work environments that truly support and encourage conversations about mutually beneficial, flexible work+life solutions.<sup>2</sup>

The government needs to update public policies that are woefully ill suited to modern times. This includes outdated tax policies that penalize out-of-state teleworkers, overtime regulations that make it difficult for hourly nonexempt workers to access flexibility in the way they work,<sup>3</sup> and a Social Security policy that penalizes working after you begin to draw benefits.<sup>4</sup>

And we, as individuals, need to learn how to reset the way work fits into life when we experience major life events like having a baby, caring for an aging adult, going back to school, or working in retirement. *But none of these broader changes will succeed unless they are supported by a foundation of everyday contentment and order that only we can build for ourselves.* This is why *Tweak It* is the important piece that's been

missing from this big, complex puzzle. Until now. And it starts by acknowledging the seven modern truths about work and life.

***Truth #1: There is a new work+life reality for all of us.***

In the early 1990s, I was put in charge of the day-to-day management of a group of commercial bankers. At the time, there wasn't a need to train people how to fit work into the other parts of their lives. It was pretty clear. A workshop would have taken three minutes, including Q & A:

“When you walk in the door of the office at 9 a.m. Monday through Friday, that's when you begin work. After you walk out the door at 5 p.m., or when you're on your two guaranteed weeks of vacation when no one will be able to reach you, that's when you take care of everything else. If, for whatever reason, you can't walk in the door and work from nine to five in the office Monday through Friday, then we don't want you.”

While it is true that not everyone in the early 1990s worked under these conditions, this was the standard set of rules that most people used to guide when they were supposed to work and when they were supposed to deal with the other responsibilities in their lives.

But I began to notice a subtle shift. The reality of people's lives no longer matched those neat, rigid expectations. The growing mismatch caused people and business to suffer, but at the time, it felt like I was the only person who thought this was a problem that needed solving.<sup>5</sup>

I was a newly minted first-time manager overseeing a group of commercial bankers and administrators. I was married but didn't have children, so I could work that Monday through Friday schedule for as many hours as I wanted. That wasn't the case for my staff and colleagues, many of whom had children.

One day my supervisor approached my desk and said, “You need to put Jack on probation.” “What?” I responded with confusion. She continued, “Haven't you noticed he's coming in late, leaving early, taking long lunches, and talking on the phone most of the day, and he's not booking

any new business?” Naively, I pointed out, “Yes, but his wife just had a new baby, so I’m giving him some leeway.” I was shocked by her response, which was something along the lines of “We have hours and goals.” In other words, new fathers get no flexibility. As it turned out, neither did new mothers.

Around the same time, my colleague Linda had a baby. This was her first child in her recent second marriage. For more than a decade, she’d been a single mother who had successfully managed and grown some of the most high-profile accounts in the group. Before there was any formal announcement that Linda wasn’t coming back from maternity leave, Linda’s accounts were reassigned to me. Linda had chosen to quit, knowing how inflexible the office was about parenting demands. I knew there had to be a better way.

In fact there was, and it came to my attention from a somewhat surprising source—a sixty-year-old male CEO of a major bank, who was one of Linda’s former clients. I had taken over his account and set up a meeting to introduce myself. After politely, but directly, pointing out his disappointment over Linda’s departure, this distinguished CEO explained how he gave employees the flexibility to work from home or to change their hours. I’d never heard anything like this before. My head was spinning as I absorbed what he said. “Cali, you may think I’m flexible because I’m a nice guy. No, the reason I give my people some flexibility is because they stay with me forever. It’s just good business.”

This business leader was ahead of his time. He not only observed the same mismatch between rigid work expectations and life realities that I saw, but he was doing something about it. He had figured out that you closed the growing gap by creating new rules. Could companies really be more flexible in how, when, and where people did their jobs? Since it was the early 1990s, I was curious if anyone else was asking that question. I soon discovered that this CEO and I were not alone.

I became obsessed with learning as much as I could about new and innovative ways to address the transformation of work and life. Before I

knew it, the folder of articles I'd gathered on the topic was six inches thick. Through my research, I learned that there was a small but growing group of academics, think tank experts, and business leaders who recognized the fundamental change in the expectations of what life on and off the job should look like. They understood that people and employers needed to update the traditional and increasingly obsolete Industrial Age guidelines that had been the rules of the road for decades. I wanted to be part of that effort. I decided to become a work+life strategy consultant.

I knew an MBA would help me convince corporate leaders that these issues were critical to the success of their business and their people. The credential would make it harder to dismiss my arguments with "That's nice, but you don't understand business." So, in 1993, I enrolled at Columbia Business School.

There were only two jobs in the whole country I wanted. Even though I knew no one in the small, emerging work+life field, I had faith something would work out. Updated, contemporary ways of managing work and life would become a strategic imperative. Momentous changes in demographics, technology, and the global economy were happening too rapidly to make it possible to stay stuck in an obsolete, rigid work/life model.

By the early to mid-1990s, America Online had introduced the first commercial e-mail system, which marked the start of what became the 24/7 work reality. However, working from home, flexible hours, reduced schedules, job sharing, or compressed workweeks still hadn't gone mainstream. Undeterred, I forged ahead with my plans.

### ***Truth #2: We can and must be our own advocate.***

In 1995, through a combination of luck, faith, and hard work, I landed my dream job as a work+life strategy consultant at the Families and Work Institute, the leading New York-based research think tank on issues related to work, life, and family. I was working with Dana Friedman, Ellen Galinsky, and Arlene Johnson, three of the most innovative trailblazers in

the work+life field. Now, I was learning directly from the people who had inspired me from a distance for more than five years.

The expectations were high and the learning curve intense. So intense that when Arlene Johnson retired a few years ago, I wrote about the experience in my tribute to her, “It was like I decided to learn to play tennis and my first game was with world champions at Wimbledon.” I had to figure out a lot, fast.

Almost immediately I realized that *companies and managers alone couldn't solve the work+life challenges of their employees*. This directly contradicted one of the core beliefs I held going into the field. Like most people then and many people today, I thought that if we just helped human resources departments create the right flexible-work-arrangement policies and communicated them well, if we opened the best child care centers, and if we developed the best training programs for managers, all of the problems would be solved.<sup>6</sup> Yet my work in a number of organizations proved to me that these efforts were only half of the equation.

Managers and HR departments can't tell each person in the organization how to manage their work and life, because everyone's circumstances on and off the job are completely different. People have to partner with their employers.

Employers must create a work environment in which it is okay to discuss potential flexible work+life solutions.<sup>7</sup> Then we individual employees need to meet the organization halfway and come to the table with a plan that takes into consideration our needs and the needs of the business. The problem was then and is now that most people had no idea what that meant or how to do it. How do you create a plan that made sense for you and your job? How do you discuss it with your boss and your team? And then once you got the okay, how do you make that flexibility succeed day to day?

It was 1997, and I searched high and low for the how-to guidelines that laid out the steps. When I discovered they didn't exist, I decided to develop the process based on my unique experience on the front lines in companies. First step: get rid of the term *work/life balance*.

***Truth #3: The goal is work+life “fit,” not “balance.”***

It was clear to me that the using *balance* to describe the goal of flexibility for individuals caused more problems than it solved.<sup>8</sup> For example, every time I met with a senior leader in an organization, I'd explain why it was a strategic imperative to give employees flexibility to manage their work/life balance. But before I could finish the first sentence, it was as if someone flipped off a light switch. You could see the executive shut down and stop listening.

I'd work with individuals to help them try to find their own balance and they'd have a similarly unproductive response. The conversation would end with a statement like “I don't have balance” and never moved to solutions. That's because there really isn't a balance, or ideal 50-50 split, between work and life. The word *balance* itself was a roadblock. In order for there to be any progress it needed to be removed. But how do you get past the concept when it's so deeply embedded in our culture as *the* most vital goal?

One day as I was interviewing yet another senior leader about his organization's flexibility strategy, I launched into my usual explanation about the imperative to give employees the flexibility to manage their work/life balance. As if on cue, his eyes began to glaze over. I'd lost him completely. I tried to reengage by talking about how frustrating it was to lose a valuable employee and how much his business would benefit from the extra productivity employees give when they have work/life balance.

Seeing me struggle, he decided to come clean, “Look, Cali, I appreciate what you're saying. But every time you say ‘work/life balance,’ all I hear is ‘work less,’ and we have so much work to do, I need everyone to do more. Plus I don't have any kind of work/life balance myself. How can I support something I don't have?”

Suddenly, I found myself saying, “But it's not about working less for most people, most of the time. It's about working differently. Shifting your hours, working from home, changing the way the work is done so that everyone can manage the way work fits into his or her life given their unique circumstances. The goal is to create an environment where all of

those different work+life fit realities can live together to achieve the goals of business over time. You may not have work/life balance, but you do have a work+life fit.”

Suddenly, his eyes lit up. It was as if someone had flipped the light switch back on. He said enthusiastically, “I get it. Yes, even though I do work a lot, I try to play tennis twice a week and I make sure I get to most of my son’s soccer games. But I also realize that not everyone who works for me can do the same thing.” By shifting the conversation from “balance” to “fit,” I’d found the magic key that unlocked the door I’d kept banging up against for three years. One little word, *fit*, changed the conversation from resistance to possibility.<sup>9</sup>

As I began to use the work+life fit language, others had the same “aha” response. Because of the universally positive reaction, I assumed everyone would immediately embrace “fit.” I underestimated the remarkable resilience of “balance.”

#### ***Truth #4: Major life events matter, but it’s the everyday routine we crave.***

In the late 1990s, advances in technology began to accelerate. Mobile phones shrank and became more affordable. Soon everyone felt they needed to be immediately accessible day or night. Dial-up Internet service meant you could read e-mails and work from home. And business began to move into new and emerging global markets, expanding traditional hours of operations beyond local time zones. The few remaining physical boundaries that existed between life on and off the job were now gone.<sup>10</sup> The rigid guidelines that told us when we were supposed to work and get everything else done in our lives were officially irrelevant.

Not surprisingly, as I predicted, discussions about flexibility in the workplace became more commonplace and were less likely to be met with a confused “What?” Working from home, flexible hours, reduced schedules, job sharing, and compressed workweeks were increasingly

recognizable concepts. These new, more flexible ways of fitting work into life weren't broadly available, but at least they weren't dismissed outright. Progress was happening, but more needed to be done.

In retrospect, what was interesting about this period was how the work+life field (myself included) focused exclusively on new ways to manage work and life in response to major life events. If you had a baby, could you work from home every Wednesday? If your father got sick, could you work ten hours four days a week and take every Monday off to care for him? If you went back to school, could you change your hours to come in earlier and leave earlier in order to get to class on time?

I thought I'd given people what they wanted and needed the most when my first book, *Work+Life: Finding the Fit That's Right for You*, was published. It was the simple, step-by-step guide for anyone who'd experienced a major moment of change.<sup>11</sup> It explained how to create, negotiate, and implement a plan that formally changed how, when, or where you worked for an extended period of time. I'd focused on the big transitions and resets because I assumed everyone had the small, everyday management of their work and life under control. I was wrong.

As I traveled the country promoting my first book, I kept hearing the same thing over and over: "I'd love to change my hours, work from home, or reduce my schedule, but I can't even get a date / get to the gym / see my friends (assuming I still have friends) / tuck my kid in one night a week / get a physical / pay my bills / get to the dry cleaner before it closes / buy a birthday present."

At first, I didn't pay much attention. Then, after hearing a similar story repeated enough times, I began to listen more closely. People were searching for a sense of day-to-day well-being and order on and off the job, a sense that was obviously missing. Nothing had replaced the old, obsolete 1960s guidelines that told us clearly when it was "work" time and when it was "me" time. They wanted to know what the new rules were, and so did I. They hungered to move past the uncertainty and stress and find a way to love their jobs and lives again. But where to begin?

***Truth #5: We may think we manage our work and life, but most of us don't.***

I decided to start by unlocking the secrets of the people whom I call the work+life fit “naturals.” These are individuals who intuitively and naturally seem to know how to make what matters to them happen when everyone else around them flounders. They innately know how to fit all of the pieces together, often without breaking a sweat.

I'd categorize about 10 to 15 percent of the population as work+life fit naturals. You can identify them two ways:

- Their coworkers point them out by saying something like “You should talk to Diane. She always seems to have this work+life fit thing all figured out. She's got three kids, her husband works, she's training for a marathon, and she's always happy. Seriously, I'm not sure she's human.”
- Naturals will often approach me either before or after an event and say, “I'm sorry, please don't be offended, but why are you here? Isn't this information all pretty straightforward? Doesn't everyone do it?” For them, it's as if someone held a meeting to explain how you get out of bed in the morning and brush your teeth. They are genuinely perplexed as to why people need a step-by-step explanation about something that seems so obvious.

For naturals, managing their lives on and off the job is in their DNA. And they have a lot to teach the rest of us.

One of my most memorable encounters with a work+life fit natural almost ended in disaster. A couple of years ago I spoke to a group of six hundred junior-level accountants at one of the Big Four professional services firms. The senior managing partner who was going to introduce me came up at the cocktail party before the speech, shook my hand, and said, “It's so nice to meet you, but I don't understand why you are here.” (My radar went off immediately.)

He began to explain how he was a rabid Penn State football fan, and when

he was a junior-level accountant he made it clear that during football season, “I go to all of the weekend games. I would talk to the scheduler on Monday morning and explain how I needed to be off on Saturday. He or she would then give me extra work during the week, especially in busy season, so I could be at the game. It worked out fine. I don’t understand why this is so hard.”

I gently pointed out to him, “Well, you are what I call a work+life fit natural. Making small, ongoing tweaks in your work and life seems obvious to you. I can guarantee that most of these six hundred junior accountants in the room tonight don’t have any idea how to do it.” I could tell he thought I was nuts. He politely shook my hand and walked away. Needless to say, I couldn’t wait to hear his introduction.

We filed into the auditorium, and the senior managing partner bounded onto the stage. He began, “To be honest, I didn’t have any idea why we hired our speaker to present to you tonight. It’s always been pretty clear to me how to flexibly manage the things you have to do at work with what you want to do in your life outside of work. And I guess until tonight I just assumed everyone else did, too. But I spent some time talking with many of you earlier, and you don’t have a clue! So, thank goodness she’s here to set you straight. And with that, let me introduce Cali Williams Yost . . .”

In my search to unlock their secrets, I’d ask any work+life fit natural I met how they did it. Over time, I began to see a pattern. There were a few simple steps most of the naturals followed without being conscious of it. These steps became the *Tweak It* practice you will be introduced to in chapter 3.

Once I understood the steps that were intuitive to the naturals, I realized they were almost completely missing from the routines of everyone else. Yet, when I’d point this out, I’d get a surprising amount of denial and pushback in return: “But, Cali, I swear I’m already actively managing my everyday work+life fit, and it’s still not working.” After I heard this enough times, I realized that most of us genuinely *believe* that we actively manage our everyday work+life fit, even if we don’t. Perception doesn’t match reality. But how do you motivate people to learn a new practice that will give them what they crave when they think that they’re already doing it?

I decided that I needed proof. I started to ask people scheduled to attend one of my presentations to complete a brief pre-session survey. In total, 242 full-time working adults who attended eight different presentations answered the questions. Across industries and groups, their responses were basically the same. You will hear more about the results of this survey in chapter 4, but here's a summary:

- A majority of the respondents genuinely believe that they actively manage their everyday work and life on a regular basis. Seventy-five percent agreed that “on average, I actively manage my work and personal responsibilities and goals *daily or weekly*.”

But as they answered the next questions, the gap between perception and the reality began to show:

- Only 40 percent agreed that “I *always* keep a calendar with all of my personal and work to-dos and goals in one place.” Most didn't have a clear snapshot of their work and personal activities and priorities in one place, which is critical for making good decisions.

- Twenty-six percent agreed that “On average, I set time aside *daily or weekly* to check in with myself and answer the question, “What do I want?”” In other words, less than a third regularly reflected on what mattered to them. You can't take action without knowing what you want. And finally . . .

- Only 15 percent said, “When I see a mismatch between what I want in my work+life fit and what's happening I make adjustments, *always*.” Only 15 percent, or very few, said they took control and added what was missing and stopped what wasn't working. Interestingly, this percentage matches my estimate of the number of work+life fit naturals in the population.

No wonder most of us often feel like corks bobbing on a sea of everyday chaos. In all fairness, no one trains us to manage our work and our lives. And many of us keep waiting for someone else—someone outside

or above us—to tell us what to do. According to our most recent national study of full-time employees in the United States, the 2011 Work+Life Fit Reality Check, 73 percent of respondents said they still believe that “work/life flexibility is only possible if my employer and/or boss provides it.”<sup>12</sup> That’s an example of obsolete thinking in action. You can’t wait. My purpose in this book is to teach you how to take control and make what matters to you happen, personally and professionally. Because, if not you, then who? Honestly, the answer is no one.

I’d decoded the secrets of the work+life fit naturals, and the *Tweak It* practice was born. Now I had to test it. The response was more than I could have imagined.

### ***Truth #6: Small, regular actions make a big impact.***

Proof is everywhere that small changes pay off over time. You lose two sizes by tracking your daily calories with Weight Watchers. You fund a European vacation by automatically transferring fifty dollars a week to savings. It’s the same with managing the way work fits into your life day to day. *Tweak It* harnesses the small, targeted actions related to wellness, your job skills, networking, social media, finances, relationships, and personal maintenance for an equally powerful return. Soon enough, these barely noticeable choices will become second nature and collectively transform your performance both on the job and off without any scary, bold disruption. There’s no one-size-fits-all balance, which you’ll never achieve. It’s about powering success at work and at home every day in subtle, practical ways.

As I developed the *Tweak It* practice, I reviewed other popular personal productivity tools. I was struck by how complicated many of them were. They got points for being comprehensive and covering every possible base, but I couldn’t understand how someone with the demands of a real life and a real job was supposed to make them part of an already overloaded weekly routine. If *Tweak It* were going to become part of an already busy life, it would have to be simple and straightforward.

Before I introduced the *Tweak It* practice to my clients, I tested it myself. In addition to running my business, I'm also a wife, a mother of two, a daughter, a sister, and a friend. Honestly, at first, I was skeptical that a practice of small, deliberate choices would create order out of my work+life chaos. But it did, and it still does.

Finally, in 2006, after months of testing, I was ready to introduce the practice to my clients. I thought people would like it, but I had no idea how much they'd love it! The enthusiastic response confirmed how desperate people were. I watched in awe as the spark of hope and possibility caught fire in front of my eyes.

Not only did they like the simplicity and concreteness of the *Tweak It* practice, but they had fun! As people shared their tweaks and brainstormed with each other about the small changes that would have the biggest impact on their work+life fit, you could see smiles on everyone's face and hear laughter throughout the room. In less than ninety minutes, the atmosphere shifted from frustration to a sense of possibility and optimism. Here's some of the feedback I received after teaching the *Tweak It* practice:

The group was unbelievably engaged, asked many questions and stayed to talk to Cali after the presentation. Every single one of the attendees filled out an evaluation form—which is unusual—and all had glowing comments concerning how relevant and motivating it was.

The bottom line is that work-life fit is always something that people want to learn more about and really want to solve. I think today people are extremely busy and stressed about work. It was clearly highly relevant and motivating to everyone who attended. It was very, very well received.

Cali suggested very specific actions to address work-life fit, which I thought was the most motivating part of her presentation. She had real, everyday examples—the small things you can do to build fit into your life. It was immediately actionable and relevant.

—*Fortune 500* consumer products company

Work-life fit is such a foreign concept to a military organization, especially to our “middle management”—commanders and captains who can find it difficult to implement within the fleet. Work+Life Fit helped us strategize ways to engage personnel at that level so they have a better understanding of how small changes could have a big impact on the individual level. One senior participant was getting ready to take command of a ship, and she stood up during Cali’s presentation and said, “I really had an aha moment,” realizing that small changes could have a significant impact on people’s lives.

Military personnel don’t have a tremendous amount of control over their own work-life balance. Cali excelled at getting people to look at it from an individual level, and finding ways to present it as a partnership to their leaders. That’s what resonated with our audience; they were given the tools to improve their own quality of life while still working within the chain of command.

—U.S. Navy

What I learned from watching these groups and many others over the years is that the real power of *Tweak It* is unleashed when we do it together. Whether it’s sharing the small activities and priorities that made the most difference to us or supporting someone else so they can make a meaningful tweak happen, you begin to see that we, collectively, can build a foundation of contentment, well-being, and order that goes beyond our own everyday work+life fit.

### ***Truth #7: Together we can start the Tweak It revolution.***

About the same time I began to research and develop the *Tweak It* practice, I discovered the power of virtual communities (for example, blogs and social media) to bring like-minded people together. For the first time,

I wasn't the lone voice in the wilderness shouting "We have to transform the way we manage our work and life" and wondering if anyone else heard and agreed.

For years, I'd been frustrated with the coverage of work+life issues in the media. The reports didn't reflect what I saw on the front lines inside actual organizations when I was working with real people.

In 2005, the challenges facing upper-income working mothers dominated the news. Stories on the "opting out" revolution, off ramps and on ramps, and the mommy wars were everywhere.<sup>13</sup> While these issues were important and shined a spotlight on the desperate need for reliable, affordable child care and paid leave for all parents, they were a symptom of the broader problem that remained largely untouched by the media. Unfortunately, the symptom, not the problem, became *the* only story.

The problem, or the real story, was the radical mismatch between people's lives on and off the job and the outdated, inflexible expectations that still ruled the cultures of most organizations. Fortunately (or unfortunately), upper-income mothers could afford to respond with their feet and say, "Forget it. I'm out of here." This left everyone else who couldn't quit—the majority of mothers and fathers, elder-care providers, single people—stuck, and ignored by the media.

I decided to test what was then a new technology in an effort to refocus the debate back onto the sweeping transformation of work and life that was underway but had gone largely unnoticed. So I started blogging.

In January 2006, I launched my Work+Life Fit blog.<sup>14</sup> At first, the only regular readers were my husband, my mom (who used to leave public comments like "Great point, honey," not understanding everyone could see them) and my best friend. But slowly, it grew. And I began to meet other people online who shared their experiences, expertise, and opinions.

Then, in 2007, I was asked to blog for *Fast Company*,<sup>15</sup> and in 2010 I began to blog for *Forbes*.<sup>16</sup> (The hard work was rewarded when Forbes.com named the Work+Life Fit blog as one of the Top 100 Websites for

Women in 2010 and 2011.<sup>17</sup>) This connected me to a whole other universe of people who were grappling with what it means to work, live, and run a business in this new emerging world with no clear boundaries. Finally, I dove into Twitter, LinkedIn, and Facebook, and further expanded my community of knowledge, support, and change around this critical issue. I realized that this was a multifaceted, multinational, enormous community interested in shaping what the future of work and life looked like.

Now, with *Tweak It*, how could I harness the power of this wonderful virtual community to spread the excitement and fun I saw in the groups that had experienced the *Tweak It* practice live? Then one lovely summer evening I attended a U2 concert with my husband and the picture became clear.

I watched as Bono stepped onto the stage and sang the first few lines of the song “I Still Haven’t Found What I’m Looking For.” Then he stopped, and held the microphone out to the crowd. Suddenly, fifty thousand people in Giants Stadium took over and began to sing. Bono danced around the stage, joyfully listening as we, the crowd, finished what he’d started with our unique, imperfect voices singing in unison. At that moment, I understood how the power of a shared experience could start a *Tweak It* revolution. Here’s how we’ll do it together:

Each week, I’ll share my Tweaks of the Week (chapter 5) in the *Tweak It* online community ([www.tweakittogether.com](http://www.tweakittogether.com)) and then I want to hear from you. What are the small activities and priorities that you are going to make happen over the next seven days? Share it in a tweet on Twitter, a post on Facebook, or a video clip on YouTube. In addition to exchanging tips, inspirations, and insights with each other, experts from over fifty work, life, and career specialties will join us in the revolution. These wise and wonderful individuals share their simplest, get-started advice in the book (chapters 11–17) and in the *Tweak It* online community, so there’s no excuse for not taking action because you don’t know how to begin. The areas covered by their wisdom include the following:

**Renew Tweaks**

- ✓ Move Your Body
- ✓ Choose Healthy Food
- ✓ Prepare Healthy Meals
- ✓ Get More Sleep
- ✓ Learn to Meditate
- ✓ Do Nothing . . . Often
- ✓ Take a Vacation
- ✓ Celebrate Good Times
- ✓ Create, Dream, Escape
- ✓ Practice Your Faith
- ✓ Give Something Back
- ✓ Manage Tech Distraction

**Career Tweaks**

- ✓ Build Your Network
- ✓ Create Virtual You
- ✓ Update Your Skills
- ✓ Learn New Technologies
- ✓ Know Your Type
- ✓ For Younger Workers
- ✓ For Older Workers
- ✓ Plan a Career Break
- ✓ Find an Encore  
(Preretirement) Career
- ✓ Start Your Own Business

**Money Tweaks**

- ✓ Everyday Finances
- ✓ Retirement Savings
- ✓ College Savings

**Connect Tweaks**

- ✓ Loved Ones
- ✓ Friends
- ✓ Date
- ✓ Community

**Connect with Kids Tweaks**

- ✓ Kids under Thirteen Years
- ✓ Teens
- ✓ Just for Dads
- ✓ Nieces/Nephews
- ✓ Technology
- ✓ School
- ✓ College Planning
- ✓ SAT Prep

**Caregiving Tweaks**

- ✓ Elder Care—General
- ✓ Elder Care—with Siblings
- ✓ Child Care—Regular and Backup
- ✓ Summer Care

**Maintenance Tweaks**

- ✓ Your Health
- ✓ Your Personal Appearance
- ✓ Your Car
- ✓ Your House—Get Organized
- ✓ Your House—Clean It Yourself
- ✓ Your House—Hire Cleaning Help
- ✓ Your House—Maintain It

You deserve a life where what matters to you happens; where your personal and professional priorities fit together to create a foundation of everyday contentment, well-being, and order. But you must take the lead. And you start by acknowledging the seven modern truths about work and life:

- Truth #1: There is a new work+life reality for all of us.
- Truth #2: We can and must be our own advocate.
- Truth #3: The goal is work+life “fit,” not “balance.”
- Truth #4: Major life events matter, but it’s the everyday routine we crave.
- Truth #5: We may *think* we manage our work and life, but most of us don’t.
- Truth #6: Small, regular actions make a big impact.
- Truth #7: Together we can start the *Tweak It* revolution.

Then, make the simple *Tweak It* practice part of your weekly routine. You’ll do this by:

- understanding who will benefit from *Tweak It* in chapter 1 (Hint: anyone who wants to love his or her life on and off the job in a complex, ever-changing world);
- recognizing the small price you must pay to enjoy the big payoffs of *Tweak It* in chapter 2;
- getting an overview of the *Tweak It* practice and then diving deeper into the three phases in chapters 3 to 6;
- learning in chapters 7 to 10 how Lisa, Jeff, Denise, and Pete, four people with very different personal and professional realities and goals, used the *Tweak It* practice to improve their lives one small step at a time; and
- finding simple, get-started advice from the fifty-plus *Tweak It* Inspiration experts in chapters 11 to 17.

Yes, fifteen years ago someone may have forgotten to send the memo with the new rules for finding time every day for what matters to you in a modern, hectic world. Now there's *Tweak It*. Let's get started.

## How do you *Tweak It*?

### Walk and Work

I do what's called work-walking on my treadmill. I bought a SurfShelf that hooks onto the treadmill. I walk at two miles an hour, which is just fast enough where you kind of burn calories and you still have the dexterity to use your mouse and keyboard. I create a to-do list for my treadmill time, such as watching a video someone sent me and answering e-mails.

—Lorie Marrero, author of *The Clutter Diet: The Skinny on Organizing Your Home and Taking Control of Your Life*

### Bike to Work

I was challenged to the NYC triathlon by a former patient. At the time of the challenge, I was working eighty hours a week, eating fast food (or whatever was available in the cafeteria), and exercise was not a part of my life. I was approximately two hundred pounds. I bought a bicycle and began riding to work each day. Once the pounds started to come off, I found that I enjoyed how I looked and felt much more than I enjoyed food and wine. I eat when I'm hungry and stop when I'm full. I stay away from the fast food restaurants, never drink soda, and try to control stress. I do still enjoy a glass of scotch and the occasional cigar, so I'm by no means a true healthy-eating zealot!

—Allan Stewart, MD, director of the  
Aortic Surgery Program at NewYork-Presbyterian  
Hospital/Columbia University Medical Center



## *Chapter 1*

# ***Who Needs Tweak It?***

### ***Meet Charlie, Ellen, Carter, and Samantha***

Charlie has been a technician for the same telecommunications company for fifteen years. He's the father of two boys, whom he loves to coach in football. His free time is spent either helping his aging father, who lives in the next town, or renovating his house with a friend. After a recent strike, he's beginning to think he may need a backup plan for his job. It does help that his wife is a nurse, even if it means he needs to do his share of cooking, laundry, and general day-to-day family maintenance. He looks forward to his annual fishing trip with his friends, and he tries to take care of himself physically because he knows it's the only way he'll be able to keep doing his job another twenty years, "knock on wood."

Ellen graduated from college two years ago and is a junior accountant at a large firm. In spite of almost nonstop travel to client offices, she's continuing her education with online courses. She's close to her large, extended family and is passionate about ballroom dancing. Personally, her short-term goal is to manage her money carefully so that she can move

out of her parents' house. Professionally, she'd like to find a position in the finance department of an alternative energy company and is making a point to connect with groups and professionals in that industry. She recently met someone whom she really likes, but they struggle to find time to be together as much as they'd like.

Carter is a semiretired investment manager who would like to transition the remaining ownership of his firm to his partner within the next two years. A grandfather of four who's been married to his college sweetheart for forty-five years, he's also a part-time tree farmer and loves to travel and read. But that's not stopping him from wanting to find another part-time job that would allow him to give back to the community while bringing in some extra income. He's been exploring his options.

Samantha is a single parent of one son. She's worked in the customer-service department of a company for the last five years. Her commute is an hour each way, which doesn't leave much time at the end of the day to cook, do the laundry, maintain her car and town house, and see her son. She'd love to date, but doesn't know where to begin. Her wide circle of friends has been an invaluable source of support, and she's considering taking up yoga to manage her stress—but when?

Like Charlie, Ellen, Carter, and Samantha, most of us want and need to keep a job that pays the bills, especially today. We have lives that include family, friends, and interests outside of work that matter deeply to us. We have to maintain the place where we live and the car that we drive. We need to manage our money, plan for caregiving responsibilities, and think about how we are going to live in our later years. We require sleep, exercise, and healthy food to feel our best. And almost all of us are connected (often too connected) across all parts of our lives by technology.

These are the everyday activities and priorities that real people with real jobs and real lives struggle to control and master in a world where the rules of engagement have not been clear for a long time. In other words, most of us need to *Tweak It*.

But maybe “real people with real jobs and real lives” is too broad a

description, and you're still not sure it includes you. So let's break it down further. Like you, Charlie, Ellen, Carter, and Samantha are members of at least one of the six specific groups of people who, for different reasons, will benefit from a weekly practice of powerful small actions made deliberately and consistently. They include women, men, Gen-Y/Millennials, adult caregivers, "retirees" who work, and entrepreneurs.

### ***Women (partnered, single, mothers, and nonmothers)***

*Tweak It* is for women *and* men; however, it's important to emphasize that women are the ones who have tried their best to bring the growing work and life mismatch to the world's attention for the past two decades. The old strict rules of when you work and when you manage your life no longer align with the rapidly changing realities of everyone's responsibilities on and off the job. But because women bear children and often are the primary parent (although increasingly less so<sup>1</sup>), the perception became that this mismatch was a "women's issue."<sup>2</sup> The historic transformation of work and life was the real problem, but the most noticeable symptom, pregnancy and child care, became the focus.

We are aware of a colleague's pregnancy, but we can't easily see a coworker care for a sick parent or a handicapped adult sibling, take an evening class, have a phone conference at night with a client in another time zone, or manage a chronic illness.

When a baby is born, a mother is not at work for a period of time, which again is noticeable. After the new mother returns to work (assuming she returns), she now has a different set of circumstances on and off the job, which can be noticeable as well. When we connect the visible pregnancy with the noticeable absence and the assumed change in circumstances, it's easy to conclude that the conflict between lives at work and at home must be about women having children. Even when the research consistently proves that it's not.<sup>3</sup>

When I point out the inaccuracy of this perception, people will push

back and say, “Yes, but men who have children and people with aging parents don’t disappear from work for three to six months like mothers do.” Actually, in both instances the disappearance can occur faster and be more acute. Elder care or illness often happens suddenly and unexpectedly, whereas most of the time people have months to plan for the absence of a pregnant coworker. And, usually, the date the mother is expected to return is predetermined and easy to plan around as well. I’ve witnessed countless cases over the years where, without notice, people are out of work for weeks or months because of a heart attack or the severe illness of a parent. And while men may not disappear for months after a baby is born, new fathers also experience a meaningful shift in priorities that requires them to change their everyday work+life fit.<sup>4</sup> But that shift is not as visual. We don’t *see* that a new father was pregnant, so we don’t make the direct link to the change.

While efforts to support working mothers have been helpful and well intentioned, they’ve also inadvertently reinforced the already pervasive “mommy penalty”<sup>5</sup> that unfairly targets and limits women’s career advancement. This is the misperception that women, particularly mothers, are the only group that struggles with their responsibilities on and off the job and are, therefore, unemployable. The truth is that men are reporting higher levels of conflict between their work and personal lives than women, but again there aren’t the same visual clues, so we miss it.

I hope that *Tweak It* finally broadens the focus beyond motherhood and places it back on addressing how the historic, radical transformation in work and life over the past two decades has affected all of us.

### ***Men (partnered, single, fathers, and nonfathers)***

If you are a man, then reading *Tweak It* may be first time that you’ve:

- picked up a book or participated in a community about how to better manage your day-to-day work+life fit;

- felt like you were a welcomed and valued participant in that conversation; and
- realized that you are not the only guy who wants to make what matters to him happen as part of a successful career.

Coincidentally, as I started writing this chapter, my aunt told me the following story. It's about her recent experience recruiting a new dean for the community college at which she is a long-time professor. Her story illustrates perfectly how senior-level men are beginning to seek and prioritize the ability to work and have a life. She wrote:

I was on a hiring committee for our new dean. It took a year for us to find the right person, and did we get a winner! I was also part of the group that wrote the position announcement and job description. The job description really was looking for a Super Man or Woman. It was an impossible description for any one person to fill. We discussed burnout and were concerned we would use up the successful candidate, if we could find him/her. But—we found him—and at our first kickoff meeting of the academic year, I gave him a Superman coffee mug. He keeps it prominently displayed in his workspace as a testament to our support for him.

He has two young children, and many days he leaves work mid-to-late afternoon to pick up the children from school. Other days he is there until 6 or 7 or even 8, and he responds to e-mails sometimes well into the night. I believe he also coaches one of the children's sports teams. In one of our conversations, he reminded me that the job description had a bullet item about work+life fit—that the successful candidate would be able to manage that. He said that impressed him about this position.

Men want and need the flexibility to make what matters to them happen just as much as women do.<sup>6</sup> But historically they've been excluded

overtly and subtly from the work+life issue. I've witnessed several examples of this over the years:

- In many organizations, the responsibility for addressing work+life issues is part of the Women's Initiative.
- HR leaders would hire me to work with their employees and dismiss my prediction that men would participate if they were invited by saying, "Don't be disappointed if they don't show up." They were invariably shocked when almost half of the audience was men.
- In most mainstream media outlets, work+life challenges and solutions are discussed in the style sections of newspapers, on morning talk shows aimed at women, or in women's magazines.

No wonder men haven't felt welcomed or included. The message has been that the discussion about how to fit your work and personal life together doesn't apply to you. And, if you're having trouble, you're the only one who is: "Dude, there must be something wrong with you."

Not only are men reporting higher levels of work+life conflict than women are,<sup>7</sup> but a clear majority of adults surveyed who work full-time believe work/life balance is an issue for everyone, not just women.<sup>8</sup> Therefore, it wasn't surprising that another round of recent studies all found that men face many if not more of the challenges managing their responsibilities on and off the job than women do.<sup>9</sup>

Men's benefits from the *Tweak It* practice include creating a strong professional network, updating their skills, strengthening their personal finances, managing the caregiving for their children and aging relatives, connecting with friends, and making time for sports and fitness.

Yes, I hope *Tweak It* finally puts to rest the myth that work+life fit is a women's issue, but I want men to know that the *Tweak It* practice and community are 100 percent meant for them as well. I hope men become active and enthusiastic participants in the *Tweak It* revolution. In fact, nothing will truly shift without men onboard. Some of my most powerful partners for

change over the years inside of companies have been men. Their voices on this issue are valuable and important. I hope to hear many more!

## ***Gen-Ys/Millennials***

Gen-Ys/Millennials have gotten an incredibly bad rap in the workplace and in the media for their supposed obsession with work/life balance.<sup>10</sup> For these digital natives, technology connects all parts of their lives on and off the job all of the time. I often joke that if I could get the people under thirty years old who work for my corporate clients into a soundproof room they'd say, "Why do we have to come to the same place at the same time every day to get work done?" They don't understand the lingering, outdated rule that says work is nine to five in the office, Monday through Friday, and life outside of work happens after that.<sup>11</sup> Like working mothers, Millennials have been waving a red flag that points to a bigger issue, which is that we all need updated, more contemporary, and flexible ways to manage work and life.

Unfortunately, instead of listening, we've interpreted their arguments for balance as "I don't want to work hard." Yes, there will always be poor performers in every generation. But what I see, more often than not, is the willingness to work hard but also the desire to work differently and more flexibly. In other words, "I'll finish that report tonight at home, but it's a beautiful day and I want to leave early and go to the ball game." The work will get done on time. It just might get done at night.

I recently interviewed a younger employee who works for one of my corporate clients. When I asked her about older managers who still resist letting her work from home, she chuckled and said, "Give it five years, and when we're in charge it will just be normal." I agree, but in the meantime, there is one area where the *Tweak It* practice can help Gen-Y/Millennials more effectively harness their innate work+life flexibility so they can do what matters to them.

The consistent complaint I hear from managers about younger employees and their pursuit of balance is that they sometimes don't adequately

consider the needs of the business or their colleagues. For example, a manager told me this story: “I have a young guy who works for me. He always gets his job done, but because he’s still learning, he requires supervision. He often asks me if he can finish projects at home in the evening or over the weekend. In theory, I don’t have a problem with that; however, in practice it’s tough. The problem is that I’m the person he comes to when he needs a question answered, and I have a family. Therefore, I am not always near e-mail or my mobile phone when he has an issue to discuss. It just doesn’t work for me.”

If that Millennial employee had a way to think through the impact of working on the project from home in advance—how it would affect this boss, his team, and so on—chances are he’d receive a more positive reception for his request. That communication and coordination process is part of the *Tweak It* practice.

You’ll pick the small activities and priorities you want to incorporate into your work+life fit for the week. Then, you’ll consider whom you need to talk to at work and in your personal life in order to make that tweak succeed for everyone. For Millennials, this more thoughtful, organized approach could increase support from their managers for the kind of flexibility that’s such a no-brainer to them but is unfortunately misunderstood by others.

## ***Adult caregivers***

I’m often asked, “Seriously, Cali, people have been trying to bring the way we live and work into the twenty-first century for more than two decades. What’s going to be the tipping point that finally gets the attention of the powers that be?” My simple answer is “Elder care.” Why? In one year, 65 million people will care for a chronically ill, disabled, or aged family member or friend twenty to forty hours a week on average.<sup>12</sup> Currently, a quarter of adult children will provide this type of care to a parent. These responsibilities exact a heavy toll on the caregiver, physically, emotionally, and financially.<sup>13</sup>

Millions of us will face the difficult and expensive task of having to

work while caring for an aging adult, especially as the huge Baby Boomer population gets older.<sup>14</sup> This doesn't even include the millions of people who work while caring for a disabled child or an adult sibling.

I always had a professional understanding of the realities of elder care, but it wasn't until I supported my mother in the last few months of her life as she battled cancer that I truly appreciated just how uniquely difficult it can be.<sup>15</sup> Elder care makes child care look like a walk in the park for the following reasons:

- Whereas most children grow and mature at a predictable, consistent rate, each adult requiring care is different in terms of his or her needs and the progression of his or her illness.
- While child care is exhausting, at least you can see the effort as a positive investment toward the future. With elder care, it's exhausting and it supports the end of someone's life journey, and that takes an emotional toll.
- With children, you are the adult and have control. With other adults, they have veto power and don't have to comply.

Because it's simple and straightforward, *Tweak It* is particularly relevant for the needs of adult caregivers who are trying to fulfill their responsibilities outside of work and keep their jobs. It fills a void of work+life fit how-to information that leaves too many working caregivers stranded and overwhelmed. If you're part of the rapidly increasing ranks of elder-care givers . . . welcome!

### ***“Retirees” who work***

If you are part of the generation approaching retirement, then you can relate to the days when a training session on how to work and manage the other parts of your life would have taken three minutes including Q & A. You grew up with the inflexible “nine to five, in the office, Monday through Friday” rule of thumb that governed the way we worked and

lived. And even though it's now obsolete, those guidelines are still part of your belief system. For most of your career, you didn't have to take control and actively manage your daily work and life so that what mattered to you happened. The boundaries between "work" time and "me" time were rigid and clear.

More Baby Boomers are directly challenging the part of that old rule-book that said by sixty-five years old, you are completely retired and not working.<sup>16</sup> A 2010 study of 9,100 employees by Towers Watson found that 40 percent of workers are planning to retire later than they were two years prior. Many are looking for new "encore" careers that allow them to earn money and work for a cause they feel passionate about,<sup>17</sup> while others plan to continue to work in their current jobs.<sup>18</sup> They're creating a new "working retirement." This is a real trend when you go to the AARP website and find a separate section entitled "Work & Retirement."<sup>19</sup>

If you are a working retiree, the *Tweak It* practice shows you how to take control over the way work fits into your life in this new phase. You can make sure that the activities and priorities that keep you healthy are part of your routine, along with the hobbies and experiences you don't want to put off until "retirement."

## ***Entrepreneurs***

When I present to a group of people inside of a company, I'm often asked, "So, Cali, what's your work+life fit?" I'm more than happy to share. I explain that "I'm a mother of two, a wife, and I work for myself primarily out of my home office unless I'm at a client site as I am today." Someone in the crowd will inevitably reply, "What do you know about work+life conflict. You have the perfect situation." I always respectfully respond, with a smile, "It may look perfect to you, but working for yourself isn't always the personal and professional nirvana you might imagine."

The truth is I'm an accidental entrepreneur. I never imagined that I would work for myself. I don't come from a family of entrepreneurs, but I

made the decision to strike out on my own and start my consulting firm because I wanted to:

- develop and implement corporate work+life flexibility strategies in the way I felt it needed to be done to succeed;
- have the ability to write my first book; and
- have control over my schedule in order to also take care of my new daughter.

I did achieve all three goals, but I also learned a very hard lesson. As an entrepreneur, I had to be even more vigilant and rigorous about when, how, and where I worked and where I focused on the other important parts of my life. If I didn't, work would consume me. This is why I need the *Tweak It* practice as much as everyone else.

Many would-be entrepreneurs tell me, "I want to strike out on my own because I want a work+life fit that's better than the one I have now, working for someone else." That's certainly a valid motivation, but it will only be worth it if you find that fit you envisioned. Perhaps more than being a person who works for or with others, you really have to take charge and make consistent, deliberate choices that ensure what truly matters to you happens as often as possible. This makes *Tweak It* is an invaluable practice for every entrepreneur.

### ***Who Needs Tweak It? Summary:***

Who needs the *Tweak It* practice? Anyone who wants to love their lives on and off the job, especially women, men, Millennials, preretirees, and entrepreneurs. Chances are that includes you!

### ***What's Next:***

In chapter 2 we'll compare the small price you'll pay to be part of the *Tweak It* revolution with the three major payoffs you will realize.

## How do you *Tweak It*?

### **Blog and Tweet Your Way to a Promotion**

I recently met a man who was living in Atlanta but wanted to move back to his company's headquarters in Michigan. Even though there weren't too many people in finance who used Twitter to share information, he decided to start sharing links to articles related to finance and consumer goods. He also began to write a blog. It required more time but showcased his ideas about newsworthy topics that had to do with his field. Over time, he began to get known within his company. He would go to conferences and people would say, "I know you. You're . . .," because they followed him on Twitter or had read his blog. It didn't take too long before he wound up getting the job he wanted back at headquarters.

—Miriam Salpeter, author of *Social Networking for Career Success*

### **Take a Tech-Free Sunday**

Many Sundays are what I call a tech-free Sunday. Most of my good friends know this. They'll text me, but I don't open my computer. I do not read e-mail. I don't go to CNN.com. I might read the physical paper. I might have my phone on, but I'm not on Twitter. I'm not on Facebook. I've accepted that a majority of the time this means I'm working a longer Monday to catch up. I have to go in a little bit earlier and plan for the week ahead of time because I'm a boss and there's a lot that happens. But I won't do it on Sundays.

—Sloane Berrent, founder of [www.thecausemopolitan.com](http://www.thecausemopolitan.com)