Navigating New Frontiers: An Integrated Approach to Managing and Leading Remote and Hybrid Employees

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Navigating New Frontiers: An Integrated Approach to Managing and Leading Remote and Hybrid Employees

by

Lorry Rome Perkins

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ACCEPTANCE

This dissertation was prepared under the direction of the *LORRY ROME PERKINS* Dissertation Committee. It has been approved and accepted by all members of that committee, and it has been accepted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Business Administration in the J. Mack Robinson College of Business of Georgia State University.

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Lorry Rome Perkins

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LIST OF ABBREVIATIONS AND ACRONOMYS

AI	Artificial Intelligence
CEO	Chief Executive Officer
COVID-19	Coronavirus
ERP	Enterprise Resource Planning
FAQs	Frequently Asked Questions
HR	Human Resources
HW	Hybrid Work
OST	Organizational Support Theory
RM	Remote Manager
RW	Remote Work
SDT	Self Determination Theory
SLT	Situational Leadership Theory
SPT	Social Presence Theory
TLT	Transformational Leadership Theory

ABSTRACT

Navigating New Frontiers: An Integrated Approach to Managing and Leading Remote and Hybrid Employees

by

Lorry Rome Perkins

May 2024

Chair: Gregory Gimpel

Major Academic Unit: Business

Purpose:

Leading a remote workforce and managing remote teams, from the perspective of remote teams necessitates a nuanced approach, contrasting considerably what is needed in traditional in-office settings. With the global surge in remote- and hybrid-work arrangements, it is imperative to develop theoretical frameworks to better understand the phenomenon and to identify best-practices that can be implemented by practitioners.

Design / Methodology / Approach:

This study recognizes that managing and leading may at time overlap but are distinct concepts. Therefore, this study conducts two distinct studies. The first focuses on how to manage remote and hybrid employees. It consists of interviews with twenty people who manage remote or hybrid employees and applied an abductive approach to identifying an appropriate prescriptive theory and identifies best practices for managers to follow. The second study is a qualitative case study that investigates how the CEO of a staffing firm led his team of hundreds of employees as they temporarily, then permanently shifted from in-office work to fully remote

work. The case study takes an exploratory approach that consists of in-depth interviews, human resources reports, and financial reports.

Findings:

This dissertation finds that situational leadership theory (SLT) provides a highly useful and relevant theory for research into managing remote and hybrid employees. It also finds that SLT, as previously envisioned, makes the presumption that managers can identify the needs of the people they manage. Study data suggest that this presumption may not hold true when a manager is new to a particular context, such as someone experienced managing in person teams who must now manage remote teams. To overcome this, this research proposes that a dimension of managerial experience be added to situational leadership theory, providing an incremental but pragmatic extension of the theory. The study also provides practical guidelines for how to manage remote and hybrid employees based on participants' interview data. This dissertation finds that changing the modality of work (i.e. from in-person to remote) represents a major organizational change. To successfully change an organization, the people working within the organization must also change.

Theoretical Contributions:

This dissertation extends situational leadership theory beyond its focus on the skills- and commitment-based maturity of the person being managed to also include the maturity of the manager, which is based on his or her experience managing people within a specific context. It assesses the validity of the extended theory by assessing three properties: the integration of the model's elements (i.e., logical coherence), the extension's relative explanatory power, and its practical and theoretical relevance. This research study brings the theory of liminality (aka rite-of-passage theory) to the study of remote work. It also brings the complete 3-stage rite-of-

passage process to the study of organizational change and digital transformations. As such, it makes an incremental contribution to the study of organizational change management and to the theory of liminality.

Practical Contributions:

This dissertation provides normative guidelines for managers who are supervising a remote and hybrid workforce. It also provides specific steps and actions senior executives can take to lead their employees through a rite of passage that can transform employees along with a transforming organization.

INDEX WORDS: Remote Work, Leadership, Covid-19, Management, Hybrid Work, Managerial Practices, Effective Communication, Situational Leadership Theory, Theory of Liminality, Rites of Passage

I CHAPTER ONE: INTRODUCTION

*"**Remote work didn't allow people to build as much trust or be as innovative. Trust is a foundation for everything. Without trust, we will be slow." - Eric Yuan, CEO Zoom, August 2023*** (as cited in Walker, 2023)

I.1 The Evolution of Remote Work

The effect of remote work on organizations is not a new concept; companies have been navigating the idea of employees completing their assignments outside of the office walls for quite some time. With the impact of the global pandemic, all organizations found themselves having to navigate a new path forward (Krehl & Büttgen, 2022). The 1970s witnessed the earliest mentions of flexible workspaces, largely propelled by the oil crisis, technological advancements, and evolving workplace discussions about work-life balance (van Meel, 2011). The 1980s and 1990s brought along the personal computer, fax machines, and the early internet (Gajendran & Harrison, 2007). Telecommuting – as it was often referred to then – started gaining traction, especially in sectors that were largely computer-based (McKinsey & Company, 2015). While it was initially viewed with skepticism and perceived as a privilege, or an exception rather than the rule, it marked the early recognition of the potential rewards of remote work, both for employers and their employees (Baumann & Marcum, 2023).

In the 21st century, advancements in internet connectivity, the proliferation of high-speed broadband, and the ubiquity of digital tools and platforms further accelerated the remote work trend (Gibson et al., 2002). Collaboration tools like video conferencing, cloud computing, and real-time document editing started erasing the operational differences between in-person and remote work (Şenay et al., 2021). By the 2010s, an increasing number of companies, especially within the technology sectors, began to adapt to flexible work policies, with some even operating

fully remotely (Popovici, 2020). However, the most significant push for remote work was in response to the global COVID-19 pandemic. Organizations worldwide were pressed to rapidly acclimate to remote working models to ensure business endurance (Margherita & Heikkila, 2021). This unforeseen and rapid transition not only demonstrated the viability of large-scale remote operations but also reshaped perceptions about work, productivity, and the very core of organizational structures and dynamics (Arunprasad et al., 2022). While many have written and discussed the implications of remote work (also known as teleworking or hybrid work), the need to understand remote working from the perspectives of communication, coordination, connection, creativity, and culture is crucial to enabling managers to assess where they are and where to go (Haas, 2022). Remote work is defined as an individual who performs their work outside of the physical space of their organization for the purpose of this study. While they can work in-office, they leverage other environments to perform their work whether it be from their home or from other locations.

I.2 Leading Remote and/or Hybrid Workforces

Leadership from the perspective of remote teams necessitates a nuanced approach, contrasting considerably what is needed in traditional in-office settings (Arunprasad et al., 2022). First, communication becomes paramount. Leaders must foster a culture of open and consistent communication, employing a mix of synchronous and asynchronous tools to keep the team aligned and connected (Flood, 2019; Reiter-Palmon et al., 2021). Given the geographical and often temporal differences, leaders must be adept at conveying clear expectations, setting achievable goals, and offering feedback in a manner that transcends the digital landscape (Popovici, 2020). The absence of physical presence demands a heightened level of intentionality

in interactions, requiring leaders to be proactive in recognizing accomplishments, addressing concerns, and maintaining team morale (Malhotra et al., 2007).

Remote and/or hybrid employees being successful in their roles heavily relies on the cultivation of trust (DeRosa et al., 2004). Leaders must trust their teams to deliver without the conventional oversight of a physical workspace (Gulati, 2018). This demands a shift from focusing on time-based metrics to results-oriented outcomes (Appelbaum et al., 2015). Simultaneously, team members must feel trusted and valued, which creates a sense of responsibility and commitment (Palanski et al., 2011). In this remote framework, leaders also play a crucial role in maintaining inclusivity, ensuring that every team member, irrespective of their location, has equal access to opportunities, resources, and decision-making processes (Loyless, 2023). Hence, leading a remote team goes beyond task management, delving deeply into the concepts of relationship-building, cultural sensitivity, and leveraging technology for human connection (Arunprasad et al., 2022).

The rapid globalization of business operations, compounded by the accelerated implementation of remote working models, has rendered the leadership landscape more intricate than ever before (Byrd, 2022). Thus, the leadership skillset required for such environments becomes distinctly multifaceted (DeRosa et al., 2004). Manager actions have a greater effect on their employees self-discipline and work-life when remote and/or hybrid working is higher, therefore it is essential for managers to grow their styles and reduce manager impoliteness in remote working contexts (Walsh et al., 2023). The need for managers of virtual employees to spend time enforcing norms, mentoring their employees, and recognizing and rewarding them for their output is key to remote and hybrid work (Malhotra et al., 2007).

In addition, mentoring plays a key role in transferring tacit knowledge, the kind of knowledge that isn't easily codified but is invaluable, especially in nuanced scenarios that remote leadership frequently presents (Camp et al., 2022). Flood (2019) found that through mentoring, seasoned leaders can share their experiences, insights, and strategies with their peers or subordinates, ensuring that lessons learned from years of navigating the remote leadership maze are not lost.

I.3 Managing Remote Teams

The evolution of managers guiding in-office employees has undergone significant transformations over the decades, reflecting changes in workplace dynamics, technology, and organizational structures (Awada et al., 2021). Historically, managers in traditional office settings primarily focused on overseeing employees' daily tasks, ensuring productivity, and maintaining hierarchical structures (Dinç, 2009). This approach often emphasized top-down decision-making and centralized control, with managers acting as authoritative figures responsible for directing and supervising their teams within physical office spaces (Obrenovic et al., 2020).

However, with the expansion of technology and globalization, the traditional model of in office based work begin to shift (Battisti et al., 2022). The shift from providing employees with more in person oversight and guidance toward intentional virtual environments where remote employees feel connected, safe, heard, and engaged has become paramount (Sinclair et al., 2021). Remote employees often feel disconnected from their organizations and teams even while having leadership engagement and support. This has driven remote managers to shift management behaviors to adapt to the new normal of managing employees across different modalities of change (Anderson & Kelliher, 2020).

The transition to managing remote and hybrid remote employees represents a paradigm shift in how managers approach leadership and team management. With the rise of remote work, managers must navigate the complexities of employees dispersed across various locations, time zones, and cultural backgrounds (Franken et al., 2021). This necessitates a transition from the traditional command-and-control management styles to more collaborative and empowering approaches that prioritize trust, communication, and accountability (Contreras et al., 2020).

In this new landscape, managers must leverage the appropriate technology to facilitate virtual collaboration, provide remote employees with the necessary supportive needs and resources, and foster a sense of inclusion and connection among employees (Gandrita, 2022). Additionally, they must navigate the unique challenges associated with remote work, such as combating isolation, maintaining team engagement, and ensuring equitable access to opportunities and resources (Galanti et al., 2021). Overall, the transition to managing remote and/or hybrid employees requires managers to adjust their management approach to achieve the ongoing expectations of the modern workforce in an increasingly digital and decentralized world (Flood, 2019).

I.4 Benefits of Remote Work

Remote work has arisen as a strong force, bringing about a significant amount of benefits for both organizations and their workforce (Awada et al., 2021)**.** A main advantage is the flexibility it provides to employees, allowing them to customize their work environments, choose their preferred working hours, and strike a better balance between professional and personal commitments (Golden et al., 2006). This newfound flexibility contributes to employee job satisfaction and overall wellness (Coenen & Kok, 2014)**.**

Expense savings constitutes a significant advantage of remote work. For employees, the elimination of commuting costs and time translates into tangible financial savings and improved

work-life balance (Franken et al., 2021) while organizations can limit costs related to physical space, office overhead, and other administrative costs. This not only enhances the financial health of companies but also supports a more sustainable and environmental friendly approach to business operations (Awada et al., 2021).

Leveraging a remote work strategy provides access to a broader talent pool, breaking down geographical barriers in recruitment (Malhotra et al., 2007). Having the ability to offer new hires opportunities in terms of more flexible working arrangements, as well as having access to more geographically diverse talent pools, provides organizations with more accessibility (Vaiman et al., 2021). In addition, the increasing leverage on technology in remote and/or hybrid work environments can lead to improved efficiency and collaboration (Syvänen & Loppela, 2022). Virtual tools, video conferencing, and communication platforms empower teams to work seamlessly across locations (Şenay et al., 2021). The ease of sharing information and real-time collaboration enhances productivity, streamlines workflows, and accelerates decision-making processes (Donati et al., 2021).

Organizations that have longed looked for innovative solutions for employee retention and employee satisfaction are positively influenced by the autonomy granted through remote work (Spector, 1986). Individuals appreciate the trust placed in them to manage their responsibilities independently and without significant management oversight (Gajendran & Harrison, 2007). Gajendran & Harrison (2007) also stated that “this autonomy fosters a sense of empowerment and ownership, leading to increased job satisfaction and a higher likelihood of employees staying with the organization in the long run” (p.1529).

Finally, the embracing of remote work aligns with the evolving expectations of the modern workforce and the transition to the new future of work (Antonacopoulou & Georgiadou,

2020). As employees seek greater flexibility and work-life integration, organizations that provide remote work options increase their competitive edge in attracting and retaining top talent (Franken et al., 2021). These benefits extend beyond individual organizations, contributing to a wider societal shift regarding more adaptive, responsive, and inclusive work practices (Lamba et al., 2022). In brief, the advantages of remote and/or hybrid work extend far beyond convenience, positively impacting both individuals and the organizations that embrace this paradigm shift.

I.5 Challenges with Remote Working

The introduction of remote and hybrid working has undeniably transformed the landscape of modern employment, offering flexibility and accessibility for employees. However, this transition comes with a myriad of challenges that organizations and leaders must address (Franken et al., 2021). One significant challenge lies in maintaining effective communication across dispersed teams (Wang et al., 2021). The inability to have face-to-face conversations and engagement can lead to misunderstandings, misinterpretations, and a feeling of isolation amongst remote employees (Awada et al., 2021). Also mentioned by Awada et al. (2021), organizations need to explore innovative communication strategies bridging the gaps and fostering a sense of community among employees.

Another challenge revolves around accountability and productivity in remote work settings. Without the physical presence of a supervisor, employees may struggle with self-discipline and time management (Kowalski & Ślebarska, 2022). Addressing this challenge requires the establishment of clear expectations, transparent performance metrics, and the implementation of technology tools that facilitate efficient collaboration while maintaining accountability (Awada et al., 2021).

Remote work also brings forth challenges related to employee well-being (Bergefurt et al., 2023). The distorted boundaries between and employees work, and home can lead to burnout

and increased pressure (Oakman et al., 2020). Striking stability between employees professional and personal life becomes paramount; organizations must prioritize mental health initiatives, which lead to a better work-life balance, as well as resources to support the overall wellness of remote employees (Awada et al., 2021).

Inclusivity and team engagement present additional hurdles in the remote work landscape. Building a strong team culture becomes challenging when individuals are physically dispersed (Donati et al., 2021). Managers need to identify innovative solutions to foster a sense of belonging, encourage team collaboration, as well as ensure that remote employees are not left feeling isolated or excluded from important discussions and decision-making processes (Hoch & Kozlowski, 2014).

Further, security concerns around company secrets have emerged as a significantly problematic asset of remote work (Okonkwo & Adeniran, 2021). With sensitive information being accessed from outside of the physical buildings, organizations must prioritize safety measures to protect both their data and systems (Okonkwo & Adeniran, 2021). Intellectual property protection and a reluctance to enforce remote employees security have become problems that organizations find themselves having to navigate day in and day out (Okonkwo & Adeniran, 2021).

Overcoming these issues when managing remote teams lies in adapting traditional leadership models to suit the unique dynamics of virtual work environments. Leaders must redefine their strategies for motivation, performance evaluation, and team interaction (Arunprasad et al., 2022). This involves embracing a more empathetic leadership style, leveraging technology to foster collaboration, and continuously refining approaches based on evolving remote work trends (Boga & Ensari, 2009). By understanding and effectively

addressing these challenges, organizations can release the full potential of remote working while mitigating associated risks.

I.6 Productivity and the Remote Employees

The influence of remote working on employee outputs of their work and task execution remains a topic of extensive debate and study. On one hand, remote work offers the potential for increased productivity as employees gain more control over their work environments (Camp et al., 2022). However, distractions, isolation, and the lack of a structured office setting can have varying effects on individual and collective productivity (Arunprasad et al., 2022). One of the key factors influencing productivity in remote work is the level of self-discipline and time management exhibited by individuals (Uhl-Bien & Arena, 2018). Without the traditional cues provided by a physical office, employees must proactively structure their workdays, set priorities, and establish routines to maintain increased productivity (Awada et al., 2021).

Collaboration and effective communication between employees are integral to productivity in any work environment but remote work introduces a reliance on digital communication tools, which can enhance efficiency but also create problems (Charalampous et al., 2018). Employees need to have the ability to seamlessly collaborate and co-create so that everyone can fully participate in brainstorming sessions, continuous improvement opportunities, and decision-making for effective collaboration (Ilag, 2021).

The absence of face-to-face supervision has caused concerns about accountability and performance (Nugroho, 2021). That being the case, employers must shift their focus from time-based metrics to outcome-based assessments, emphasizing results over the number of hours worked (Chatterjee et al., 2022). Establishing transparent performance metrics and regular check-ins will contribute to a culture of accountability and support remote workers in achieving their goals (Lai et al., 2020).

Technology is important in shaping work delivery and task execution for remote and/or hybrid workers (Awada et al., 2021). The availability of advanced collaboration tools can facilitate seamless communication and collaboration (Ilag, 2021). Nevertheless, potential technical issues, connectivity challenges, and the learning curve associated with new technologies can temporarily disrupt productivity (Aczel et al., 2021).

Clearly, the impact on productivity made by remote work is intricate and depends on a number of factors, including the type of work being executive, the inclusion of both the employees and the organization, and the adaptability of both employees and employers (Baumann & Marcum, 2023). Organizations that proactively address challenges, provide the necessary resources, and foster a supportive virtual work environment are better positioned to leverage the productivity opportunities of remote work while decreasing potential drawbacks (Costantini & Weintraub, 2022). With that in mind, the increasing prevalence of remote and hybrid employees in today's global business landscape necessitates a deeper discussion into the intricacies of remote management.

I.6.1 Contribution

The research aims of this dissertation are to investigate the strategies employed by managers in effectively guiding remote employees and those nuances that effectively enable executives to lead organizations reliant upon a remote and/or hybrid workforce. With the prevalence of remote work engagements, understanding how both managers circumnavigate the unique encounters of guiding remote employees and the role of managers within the remote work context is crucial for organizational success.

This dissertation explores the answers the following research questions:

RQ1: What are best practices for managers to elicit high performance from their remote and hybrid employees?

RQ2: What can the shift to remote work tell us about how to lead companies through organizational change?

This research is targeted to and offers practical guidelines for managers and C-level executives. It also extends situational leadership theory by adding a new dimension of manager maturity. It offers a novel theoretical perspective to those executives leading organizations through significant change or disruptive occurrences, such as the widespread shift to remote work arrangement or navigating significant organizational change during a global pandemic (Van Gennep, 1960).

This dissertation is based on 2 separate studies, each reported as a separate research article. Chapter 2 is the article "Managing Remote & Hybrid Employees" which is based on interviews with 20 middle & senior managers who manage remote teams. Chapter 3 is the article "Rite of Passage: A New Approach to Leading Digital Business Transformation" a case study about leading a company through wide-ranging corporate transformation that included a shite to remote work. Chapter 4 is the final chapter that provides the synopsis of both articles and the contrasting themes that support the basis of this study.

II CHAPTER TWO:
MANAGING REMOTE & HYBRID EMPLOYEES:
AN APPLICATION AND EXTENSION OF SITUATIONAL LEADERSHIP

II.1 Introduction

The concept of remote work, or telecommuting as it was historically termed, has been a point of discussion since the technological advancements of the 20th century began to offer possibilities beyond traditional office confines (Bailey & Kurland, 2002). Remote work is defined by the absence of a regular physical presence in a centralized workplace, with employees often working from their home or from other places (Nilles, 1994). The growing presence of digital tools, high-speed internet, and collaborative software has not only facilitated this mode of work but has also shown potential benefits such as increased flexibility, reduced commuting stress, and even enhanced productivity in some cases (Gajendran & Harrison, 2007).

Hybrid working schedules, a more recent development, offer a blend of in-office and remote work, allowing employees to experience the best of both worlds (Hota et al., 2023). The rationale behind this model is to harness the advantages of remote work, like employee flexibility and reduced commute times, while still retaining the collaborative and social advantages of in-person interactions (Brynjolfsson, 2020). The outcome of the global COVID-19 pandemic has caused many organizations to consider or have already adopted hybrid models, believing them to be the future of work (PWC, 2021). However, hybrid models bring their own complexities. Organizational leaders often struggle to determine which roles are suitable for hybrid schedules and how to maintain an inclusive culture when employees have different work locations and ensure seamless collaboration across hybrid teams (Choudhury et al., 2020).

Both remote and hybrid work primarily focus on individual or team locations, but can also include an organizational model in which entire teams or departments can operate

independently across multiple geographical locations or time zones (Hinds & Mortensen, 2005). This often involves a networked approach, with a decentralized decision-making process that emphasizes the importance of autonomy and trust among units (Gajendran & Harrison, 2007). Nevertheless, even then, the intricacies of remote work require robust technological infrastructure, clear communication protocols, and a concerted effort to nurture organizational culture across dispersed teams (O'Leary & Cummings, 2007).

And even with those elements in place, while remote work has its advantages, it's not without challenges. By working from home or other places, employees reduce the boundary that separates the employees work and family environments (Golden et al., 2008). Also, as stated by Popovici (2020), “companies can find it difficult to build a culture that is accepting and supportive of remote work, which can be detrimental to their retention efforts since it can go as far as impacting employees’ motivation and satisfaction” (p. 470). A third and often overlooked challenge is one of innovation, in which team dynamics and the impact of trust, leadership, monitoring and control, and creativity in a remote innovation environment have become challenges (Konrad-Märk, 2021).

Virtual leadership is a pivotal concern for organizations. Leadership development encompasses a broad spectrum of activities, ranging from formal training and mentorship to challenging job assignments, all aimed at the facilitating the enhancement of leadership qualities in individuals (Galanti et al., 2021). The goal is not just to hone individual leadership abilities but to foster an organizational culture of continuous growth and adaptation. Traditionally, leadership development has emphasized interpersonal skills, decision-making abilities, and strategic vision, often within the confines of face-to-face interactions and co-located teams (Collins & Holton Iii, 2004; Newman & Ford, 2021). However, as the way employees work

changes, so does the scope of management development, necessitating adaptations in strategies and techniques. Post-Covid, leaders have found themselves dealing with a new paradigm, focused on developing their skills while simultaneously leading remote teams (Kozlowski et al., 2021).

The complexity surrounding remote work is increasingly becoming a challenge for managers to navigate (Arunprasad et al., 2022). Many of these complexities include mental health, productivity, connecting with the organization, and driving team engagement (Bergefurt et al., 2023). This dissertation seeks to answer the following research question:

RQ: What are best practices for managers to elicit high performance from their remote and hybrid employees?

Through a qualitative lens, the focus on the aspects of managing remote or hybrid remote employees will be studied to identify opportunities to navigate a rather complex and constantly evolving landscape. This study is targeted to provide practical guidance for middle and senior managers. The topic of this paper is how managers can be more effective and leading remote and hybrid employees. This paper is composed of the following structure. The next section reviews the relevant literature to provide background context for this study, followed by explanation of key theoretical perspectives used within this research domain. The subsequent section details the research method. The study findings and analysis follow. A conclusion brings the paper to a close.

II.2 Literature Review

The transition to remote work has undeniably altered the landscape of modern businesses. With a legacy dating back to the 1970s, remote work has evolved from a novel concept to a widely adopted practice, underpinned by technological advancements and shifting perceptions of

work-life balance (Kozlowski et al., 2021). With the operational aspects of remote work having been extensively studied, it has become vital to explore its impact on managerial and leadership dynamics. In particular, the evolution and growth trajectories of middle and senior level managers in a remote context remain underexplored, with existing literature primarily focusing on the operational, technological, and team engagement aspects of remote work (Taser et al., 2022).

In examining the role of managers in the relation to managing remote and/or hybrid employees, the literature has emphasized their significance in terms of strategy execution, team engagement, and culture building (Loyless, 2023). In remote settings, these roles are further accentuated as managers bridge the gap between strategic decision-makers and remote employees. While research by DeRosa et al. (2004) offered early insights into virtual team leadership, there remains an important gap in understanding how remote work affects the growth, challenges, and dynamics of middle and senior level management (Gandrita, 2022).

II.2.1 Literature Search Strategy

This systematic literature review (SLR) incorporated academic research as well as the study of practical reports. Figure 1 illustrates the initial process was created to achieve the targeted research goals and objectives. Suggested by Braun and Clarke (2006) when describing their six-step process of qualitative data analysis, an initial scan across multiple applications was conducted, and a high-level review was carried out to determine the correct search terms to support the research focus.

The search was conducted across multiple scholarly databased including, Academic Search Complete, Business Source Complete, JSTOR, and Web of Science (WoS). A non-scholarly search was conducted across Google Scholar to pinpoint supporting themes of the

research study during the summer of 2023. When using the 'topic' field to search, all the articles returned contained the requested search terms in their titles, keywords, or abstracts.

Systematic Literature Review Process

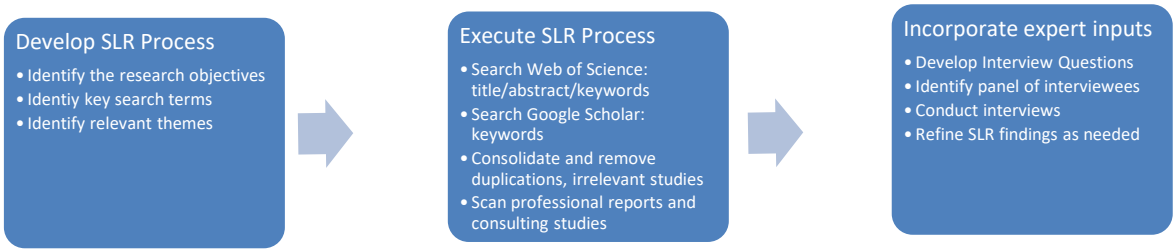

Figure 1. Systematic Literature Review Process

To support the search of the literature, the approach was organized into three key literature reviews, with the primary literature review covering the initial topics: (a) remote work, hybrid work terms; (b) virtual leadership or management; (c) team engagement; (d) connection; and (e) communications. Initial literature highlighted relevant themes used to investigate the topic. Table 2. provides an overview of the secondary literature review that explored theoretical concepts aligning with the research study, including (a) social presence theory; (b) organizational support theory; (c) self-determination theory; (d) situational leadership theory; and (e) transformational leadership theory.

II.2.2 Background on Remote Working

The emergence and rise of remote and/or hybrid work, partly fueled by technological advancements and more recently by global events like the COVID-19 pandemic, have increased the layers of complexity for employee oversight (Brynjolfsson et al., 2020). Remote employees often grapple with challenges related to communication barriers, lack of social cohesion, and the potential for feelings of isolation (Hinds & Mortensen, 2005). For leaders, managing these

dispersed employees requires a recalibration of traditional leadership models. Instead of relying solely on physical cues, leaders must become adept at leveraging digital tools, fostering trust in virtual environments, and cultivating a sense of belonging among team members who might be scattered across various geographies (Flood, 2019).

Remote Employee Connection. The transition to remote and/or hybrid work has had profound consequences on organizational culture, as the traditional elements that contribute to a cohesive workplace environment undergo significant transformation (Byrd, 2022). That culture, once largely shaped by physical interactions and shared office spaces, must now adapt to a virtual landscape (Haas, 2022). The absence of face-to-face interactions and the informal dynamics of an office setting pose unique challenges to maintaining and evolving a positive organizational culture (Aczel et al., 2021). Building and sustaining a resilient organizational culture in remote work settings requires purposeful efforts to foster a sense of community and shared values among employees. While virtual communication tools enable remote collaboration, they may not fully replicate the spontaneous interactions and camaraderie that occur in a physical office (Byrd, 2022). Employers need to explore creative ways to nurture a positive culture, for example virtual team-building activities, online social events, and initiatives that reinforce the organization's mission and values (Reis, 2016).

The concept of cultural alignment becomes even more importance in remote work environments. Without employee’s having physical presence to reinforce cultural norms, organizations must invest in clear communication of values, expectations, and behavioral norms (Byrd, 2022). Leadership plays a pivotal role in embodying and promoting the desired culture, setting an example for remote employees and creating a shared understanding of the organization's identity (Lamba et al., 2022).

Remote working can also impact the inclusivity of employees within an organizations culture. In dispersed work, individuals from different locations and backgrounds may feel isolated if efforts are not made to ensure everyone is equally included in decision-making processes and social interactions (Lamba et al., 2022). Lamba et al. (2022) also note the need to establish channels for open communication, diversity, equity, and inclusion initiatives, as well as providing platforms for remote employees to share their perspectives contribute to a more inclusive virtual culture.

Boland et. al (2020) stated that there is an opportunity to create a remote and/or hybrid working strategy that suits the organization, and establish a new community and sense of inclusion for all employees providing stability, community, and belonging, regardless of whether employees are remote or in office, or a combination of both. Virtual celebrations, recognition programs, and regular team meetings take on added significance as they serve to reinforce a feeling of community and shared experience among remote employees (Newman & Ford, 2021). As such, organizations must be proactive in adapting and creating new traditions that resonate with remote employees (Reeves & Deimler, 2011).

While many aspects of remote work run counter to traditional notions of organizational culture, it also presents opportunities for innovation and flexibility (Franken et al., 2021). Organizations that successfully navigate this shift recognize the need to evolve their cultural practices, leveraging technology to strengthen connections, promote transparency, and uphold a positive workplace ethos (Awada et al., 2021). Ultimately, the ability to adapt and cultivate a vibrant virtual culture will be a defining factor in the success of organizations embracing the remote work paradigm (Lenka, 2021a) .

II.2.3 Engaging with Remote Employees

The evolution of remote employee in which team management work across different locations and often time zones has provided new tests of those in managerial positions that require advanced communication skills, heightened cultural sensitivities, and effective strategies to foster team engagement in the absence of physical interactions (Hinds & Mortensen, 2005). Herein lies the pertinence of mentoring and coaching. As managers grapple with the intricacies of directing remote employees, the tailored guidance provided through mentoring and coaching becomes invaluable (Day, 2000). For instance, mentors who have successfully led remote employees can share best practices, while coaches can design targeted strategies to enhance a leader's virtual team management capabilities (Flood, 2019).

The integration of mentoring and coaching in the context of remote teams offers a promising avenue for bridging potential leadership gaps. DeRosa et al. (2004) highlight the need for leaders of virtual employees to overcome problems ranging from establishing trust remotely to navigating technological hiccups. Mentorship from experienced remote leaders can provide valuable insights into solving such problems, while coaches can offer tools, techniques, and feedback to refine leadership strategies in real-time (Tu & Li, 2021). As mentioned by Tu and Li (2021), “investing time in meaningful, deep connections with individuals one-on-one can be a refreshing change and a chance for more authentic connection” (para.).

II.2.4 Effective Remote Work Communication

Effective communication is a cornerstone in successfully managing remote workers, as it plays a pivotal role in fostering collaboration, maintaining team engagement, and ensuring that organizational goals are effectively communicated and understood (Awada et al., 2021). One key aspect of accomplishing this is the potential for miscommunication due to the lack of in person

engagement (Wang et al., 2021). Virtual employee tools, such as video platforms, employee social platforms, and collaborative software, are essential in overcoming this hurdle (Hoch & Kozlowski, 2014). Organizations must invest in reliable and user-friendly communication technologies to facilitate seamless interaction, ensuring that remote workers feel connected and informed about their tasks, team goals, and overall company objectives (Battisti et al., 2022).

Additionally, the importance of clear and concise communication cannot be overstated when managing remote teams. Misunderstandings can easily arise in the absence of visual cues and immediate feedback (Loyless, 2023). Thus, leaders need to emphasize the use of precise language and avoid ambiguity in written communication (Zigurs, 2003). Regular check-ins and status updates can provide remote employees with the opportunity to seek clarification, express concerns, and receive timely feedback (Wang et al., 2021). Establishing a transparent communication culture helps in building trust and reducing uncertainty among remote workers, contributing to a positive work environment (Neufeld et al., 2010).

Furthermore, promoting community and camaraderie for remote employees is crucial for effective communication. Virtual team-building activities, informal virtual gatherings, and the use of collaboration tools that foster social interaction can help bridge the physical gap among team members (Wang et al., 2021). Managers should motivate their employees to have ongoing dialogue and create opportunities for employees to share their experiences, challenges, and successes. By fostering a culture of inclusivity and encouraging employees to express themselves, remote workers are more likely to feel engaged and connected, ultimately enhancing the overall effectiveness of communication in the remote work environment (Byrd, 2022).

II.2.5 Theoretical Framing

Management in traditional office settings has been widely researched in the academic literature, varying across known theories, offering insights into effective managerial practices (Bass & Riggio, 2006a). However, as organizations have pivoted to embracing remote work, the applicability and efficacy of these theories in a virtual environment demand scrutiny. Early studies on remote management, such as those by Zigurs (2003), indicated distinct challenges tied to communication, trust-building, and team engagement. Yet, the context was vastly different then, as remote work was more exception than rule.

Management and its focus on remote work are informed and enriched by a myriad of perspectives, each providing a unique lens through which we can understand and interpret complex human and organizational dynamics (Uhl-Bien & Arena, 2018). *Social Presence theory*, as espoused by Short et al. (1976), proposes that the degree of salience of others in an interaction and the ability of participants to perceive and interact with each other as real people in mediated communication settings. *Organizational support theory*, developed by Eisenberger et al. (1986), suggests that when an individual perceives that the organization appreciates and recognizes their contributions and cares about their overall wellness, they will more often develop a feeling of obligation. Focusing more on leadership specific theories, *Self-determination theory* (Ryan & Deci, 2017) provides a framework for understanding human motivation, positing that autonomy, competence, and relatedness are crucial factors that drive intrinsic motivation and promote positive outcomes. *Situational leadership theory*, introduced by Hersey and Blanchard (1969), emphasizes that effective leadership is contingent on adapting one's leadership style to the readiness and capability levels of subordinates. Finally, *Transformational leadership theory*, championed by Bass (1985), underscores the role that leaders play in motivating their employees to look past their own egocentricities for the needs of the organization, emphasizing elements

like inspirational motivation, intellectual stimulation, and individualized consideration. Together, these theories weave a rich tapestry, offering complex insights into the domains of leadership and organizational dynamics.

II.3 Social Presence Theory

II.3.1 Origins of Social Presence Theory

Social presence theory is a communication theory that originated in computer-mediated communication. Developed by Short, Williams, and Christie (1976), the theory centers on the idea that communication technologies differ in their ability to transmit social cues, ultimately influencing the sense of "presence" individuals feel during interactions. In the context of remote work, social presence theory becomes highly relevant as it addresses the challenge of creating a virtual environment that mimics the social aspects of in person communication (Weidlich et al., 2022). This theory suggests that higher levels of social presence can enhance communication effectives, interpersonal relationships, and user satisfaction in computer-mediated communication contexts (Weidlich et al., 2022).

Remote work often lacks the physical proximity and non-verbal cues that are abundant in traditional office settings (Marques et al., 2023). Based on social presence theory, the amount of social presence in communication technologies influences the quality and effectiveness of interactions (Weidlich et al., 2022). Greater social presence is associated with increased feelings of closeness and intimacy during communication. In the context of managing remote employees, understanding and implementing communication technologies that enhance social presence become critical (Lenka, 2021a). Video conferencing, instant messaging, and collaborative platforms can bridge the social gap, providing employees with a sense of connection and shared presence despite physical distances (Marques et al., 2023).

Key elements that contribute to social presence have been identified such as visual cues, voice, and personalization (Weidlich et al., 2022). In the remote work setting, video conferencing platforms, for example, leverage visual cues by allowing participants to see each other, enhancing the richness of communication (Lenka, 2021a). The tone and pitch of voice in virtual meetings contribute to the sense of personal connection, aligning with the theory's emphasis on voice as a significant element (Moffett et al., 2021). Moffett et al. (2021) also stated that personalization, such as sharing non-work-related information or utilizing personalized avatars in digital communication tools, can enhance the social presence of remote interactions.

Central to social presence theory are several key constructs that elucidate the mechanisms through which social presence is experienced and mediated. One such construct is the construct is the concept of immediacy, referring to the degree of psychological closeness or proximity perceived between communicators (Biocca et al., 2003). Immediacy cues, such as eye contact, gestures, and communication tone, play a crucial role in fostering social presence by enhancing the sense of connection in mediated environments (Mennecke et al., 2010). Another important construct is social richness environments. Additionally, the concept of copresence emphasizes the perception of being together with others in a shared space, irrespective of physical distance, highlighting the importance of mutual awareness and interaction in fostering social presence (Osei-Frimpong & McLean, 2018).

In the context of managing remote employees, social presence theory offers valuable insights into how organizations can mitigate the challenges associated with virtual work arrangements (Lee & Takayama, 2011). By understanding the factors that influence social presence in digital communication, managers can implement strategies to enhance employee engagement, collaboration, and well-being in remote settings(Weidlich et al., 2022) . For

instance, leveraging communication technologies that afford higher levels of immediacy and social richness, such as video conferencing platforms with features like virtual backgrounds and real-time document sharing, can help recreate the social cues and interaction dynamics of face-to-face communication (Marques et al., 2023). Moreover, fostering a culture of ongoing dialogue, feedback, as well as social support can facilitate a stronger sense of social presence among remote employees, reducing feelings of isolation and enhancing team engagement across geographical distances (Satya & Shauki, 2022). Figure 2 provides an illustrative view of the tenets that exist within the social presence theory framework which was adapted from Weidlich et al. (2022). Overall, by applying insights from social presence theory, organizations can effectively navigate the challenges of managing remote teams and cultivate a more connected and engaged workforce in the digital age.

II.3.2 Improving Employee Performance

Social presence theory suggests that individuals perceive varying leveling of "presence" across different communication mediums, influencing their sense of connection and engagement (Mennecke et al., 2010). Leveraging this theory can significantly support high performing employees by fostering a sense of closeness and cohesion even in virtual or remote settings (Bickle et al., 2019). By employing communication tools that prioritize real-time interaction and rich media, such as videoconferencing or collaborative platforms, remote employees can enhance their social presence (Satya & Shauki, 2022). Additionally, creating both a supportive and inclusive work setting, where employees feel comfortable expressing themselves helps build trust, ultimately enhancing an employee's performance (Lamba et al., 2022). Through mindful application of social presence theory, employees can transcend physical boundaries and cultivate a strong sense of community, driving success and achievement of organizational goals.

II.3.3 Implications for Remote Work

For managers overseeing remote employees, social presence theory underscores the importance of selecting appropriate communication tools and strategies to enable effective collaboration (Lenka, 2021a). Regular video meetings, virtual team-building activities, and the use of collaboration tools that facilitate real-time communication contribute to a higher sense of social presence among remote employees (Edwards, 2020). By understanding and applying the principles of this theory, it is possible for managers to mitigate the challenges associated with the virtual nature of remote work, fostering a more connected and engaged remote workforce extending beyond walls of collocation.

Social presence theory underscores the significance of personalization and interactivity in remote communication, suggesting that customization features and interactives elements can enhance the sense of social presence among remote employees (Osei-Frimpong & McLean, 2018). Managers can encourage the use of communication tools that allow for personalization, such as profile pictures, customizable avatars, and current status updates, which humanize the interaction and foster a sense of identity and connection (Wortler et al., 2022). Providing opportunities for interactive communication, such as virtual team gatherings, collaboration sessions, and informal chat channels, enables remote employees to engage with each other more effectively, reducing feelings of isolation and enhancing team engagement (Wortler et al., 2022). Aligning communication strategies with the principles of social presence theory, managers can cultivate a more connected and engaged remote workforce, ultimately improving collaboration, productivity, and employee satisfaction (Tarca & Bucurean, 2023).

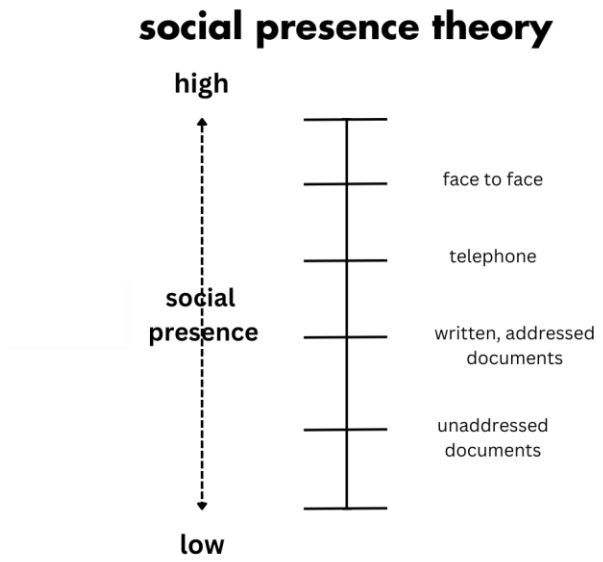

Figure 2. Social Presence Theory

Adapted from Weidlich et al., 2022

II.4 Organizational Support Theory

II.4.1 Origins of Organizational Support Theory

Organizational support theory (OST) explores the reciprocal relationship between employees and their organizations, focusing on the perceived support employees receive from their workplace. Developed by Eisenberger et al. (1989), OST proposes that when an employee feels their company values their work and cares about their wellness, they more likely will return the feeling with a positive attitude and behavior (Rhoades & Eisenberger, 2002). This theory is specifically pertinent within the context of the study of managing remote and/or hybrid employees, because the physical separation can impact employees' sense of connection and support.

For remote employees, perceived organizational support becomes crucial as they navigate a work environment that lacks the immediate presence of supervisors and colleagues (Byrd,

2022). This support can manifest in various forms, including clear communication, access to necessary resources, and acknowledgment of their efforts. Managers play a pivotal role in reinforcing this support by maintaining open lines of communication, providing regular feedback, and ensuring that remote and hybrid employees have appropriate tools and resources needed to perform their tasks (Byrd, 2022). In a remote setting, where in person dialogue is limited, clear and consistent communication is a key driver of perceived organizational support (Hoch & Kozlowski, 2014).

Trust is also a fundamental component of OST, and in the context of managing remote employees, it becomes even more critical (Gagliardi, 1985). Trust is built through consistent encouragement, transparency, and reliability. Managers can cultivate trust in remote work by demonstrating reliability, keeping promises, and showing genuine concern for employees' well-being (Kowalski & Ślebarska, 2022). Additionally, providing opportunities for social interactions, even if virtual, can contribute to a sense of connectedness and support, aligning with the socioemotional aspects of perceived organizational support (Baran et al., 2012).

Perceived organizational support has a direct impact on employee happiness, and this is especially relevant in the remote and hybrid scenario. Figure 3 provides an illustrative view of the tenets of organizational support theory and variables that support remote employee engagement adapted from Wayne et al. (1997). Remote employees may experience feelings of isolation or disconnection (Bertoni, 2022). By actively demonstrating organizational support, managers can help mitigate these challenges. This can involve recognizing and celebrating achievements, fostering a positive work culture through virtual means, and providing emotional support when needed (Kowalski & Ślebarska, 2022). In summary, organizational support theory provides a valuable framework for understanding and addressing the unique support needs of

employees, emphasizing the role of managers in cultivating a supportive and engaging work environment.

II.4.2 Improving Employee Performance

Organizational support theory states that when employees perceive their company as supportive, they are willing to be committed, engaged in their work, and encouraged, leading to improved performance (Kurtessis et al., 2017). Supporting employees through various means such as providing resources, clear communication, opportunities for growth, and recognition of their contributions fosters a sense of belonging and loyalty (Rhoades & Eisenberger, 2002). Employees who feel supported are more likely to go above and beyond in their roles, innovate, and collaborate effectively with colleagues (Jimmieson et al., 2008). Furthermore, a supportive organizational culture promotes trust and reduces stress, allowing employees to focus their energy on achieving organizational goals (Kowalski & Ślebarska, 2022). By prioritizing organizational support, companies can create an community where employees feel valued, empowered, and motivated to excel, ultimately driving higher levels of performance and success.

II.4.3 Implications to Remote Work

Within the context of remote and/or hybrid work, organizational support theory underscores the importance of supporting employee well-being, engagement, and productivity (Baran et al., 2012). Providing remote employees with adequate resources, technological support, and clear communication channels is essential to mitigate feelings of isolation and ensure they feel valued and connected to their manager and the organization (Jimmieson et al., 2008). In addition, offering flexible work arrangements, recognizing and rewarding remote contributions, fostering a culture of autonomy can further enhance organizational support and bolster remote employee's satisfaction and commitment (Gagné & Deci, 2005). Embracing the

principles of organizational support theory, organizations can effectively circumnavigate the challenges of remote and/or hybrid work and promote a positive and supportive environment conducive to employee success and organizational effectiveness.

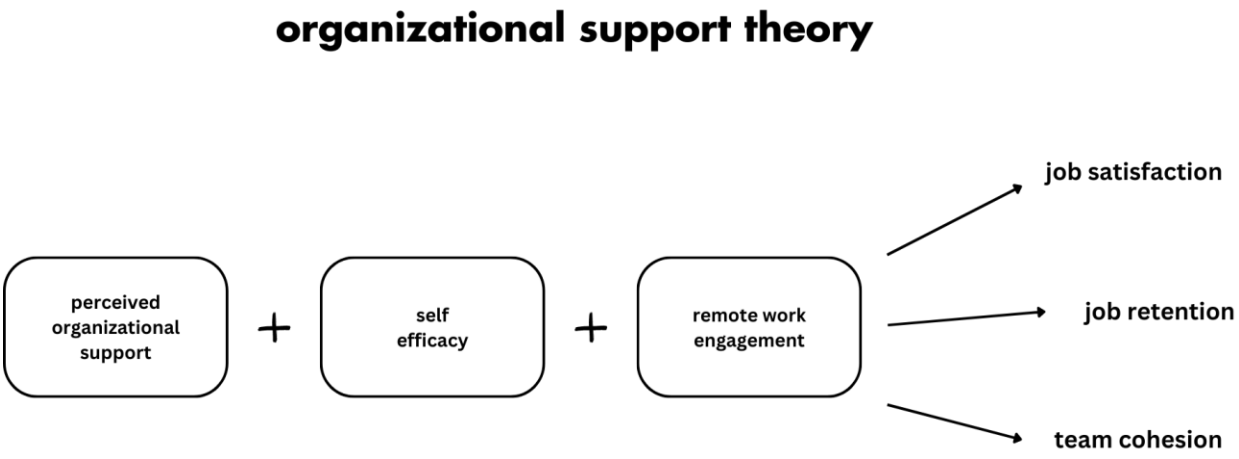

Figure 3. Organizational Support Theory

Adapted from Wayne et al. (1997)

II.5 Self Determination Theory

II.5.1 Origins of Self-Determination Theory

Self-determination theory (SDT) is rooted in the field of psychology. Pioneered by Deci and Ryan (1980). SDT is a framework that examines human motivation, particularly the underlying factors that drive and sustain intentional behavior. At the heart of SDT is the distinction between intrinsic and extrinsic motivation. Intrinsic motivation arises from genuine interest and satisfaction in a task, while extrinsic motivation is driven by external rewards or pressures. Central to the theory are three innate psychological needs that, when satisfied, foster optimal development and well-being: autonomy (a sense of volition and agency), competence (a feeling of mastery and effectiveness), and relatedness (a sense of connection and belonging with others) (Deci et al., 2017).

II.5.2 Autonomy in Self Determination Theory

In Self-determination theory, autonomy is a fundamental psychological need that drives human behavior and contributed to overall well-being (Deci & Ryan, 2008). Autonomy refers to the innate desire for individuals to feel volitional, self-directed, and in control of their actions and decisions ((Deci & Ryan, 1980). When an individual perceives that they have the freedom to make choices and act in accordance with their personal goals, values, and interests, they experience a sense of autonomy (Deci & Ryan, 2008). This sense of autonomy is essential for fostering intrinsic motivation, which is defined by participating in activities for their own enjoyment rather than looking to be rewarded or feeling any pressure from an external factor.

Autonomy is not only the absence of external constraints or control but also involves feeling supported and empowered to make choices that are meaningful to an individual personally and is also aligned to one's values and own aspirations (Deci, 2017). Environments that support autonomy are described as providing individuals with opportunities for self-expression, decision-making, and personal growth but also respects personal perspectives, boundaries, and needs (Gagné & Deci, 2005).

II.5.3 Intrinsic Motivation in Self Determination Theory

Intrinsic motivation is a form of autonomy referring to the actions for which the inspiration lies (Ryan & Deci, 2017). While intrinsic motivation is usually seen in children playing, it is also evident in the activities of adults, and it also evident in the workplace (Deci et al., 2017). Intrinsic motivation explains the inherent drive an individual experiences when engaging in an activity purely for the enjoyment, satisfaction, or personal fulfillment (Ryan, 2000). Being a crucial component for fostering well-being, optimal performance, and long-term

interaction in activities, employees are more likely to maintain their efforts and perseverance in the face of challenges when they are driven by intrinsic rewards (Ryan & Deci, 2000).

II.5.4 Competence in Self Determination Theory

Competence is another crucial psychological need that influences human motivation and well-being (Deci & Ryan, 2008). Competence is described by the innate desire for an employee to feel that they are capable, can be effective driving to being successful in their work. Employees can perceive themselves as competent in mastering challenges, acquiring skills, and achieving their own desired outcomes. This sense of competence is essential for fostering intrinsic motivation, as it reflects individuals' beliefs in their ability to effectively navigate their environment and accomplish their goals. Competence is closely intertwined with the development and maintenance of intrinsic motivation (Deci & Ryan, 2008). Employees who feel competent are more likely to participate in activities for their inherent satisfaction and enjoyment, rather than being solely motivated by providing individuals with opportunities for skill development, mastery experiences, and feedback loops that promote a sense of accomplishment and progression (Wortler et al., 2022). Research has consistently shown that satisfying the need for competence leads to a positive outcome, including increased self-esteem, persistence, and overall well-being (Ryan & Deci, 2000). Thus, fostering environments that support individuals' sense of competence is vital for promoting intrinsic motivation and optimal functioning across all aspects of one's life.

II.5.5 Relatedness in Self Determination Theory

Relatedness is a fundamental psychological need that plays a significant role in human motivation and well-being. Relatedness refers to the innate desire for individuals to feel connected, valued, and supported within their environment. This encompasses the need and

longing for meaningful relationships, interpersonal connections, and a sense of belonging. When individuals experience positive social interactions, supportive relationships, and a sense of belonging with others, they fulfill their need for relatedness, leading to greater psychological health and overall well-being.

Within SDT, relatedness is essential for promoting intrinsic motivation and optimal functioning across all domains of one's life. Research has shown that satisfying the need for relatedness leads to numerous positive outcomes, including increasing happiness, life-long satisfaction, and resilience in the face of challenges (Deci & Ryan, 2008). Relatedness supportive environments are characterized by fostering empathy, warmth, and mutual respect among one another, as well as providing opportunities for collaboration, social support, and emotional connection.

II.5.6 Improving Employee Performance

Self-determination theory proposes that individuals are driven by the inherent needs for an employee to have autonomy, competence, be relatable, and when these are fulfilled, they are more than not able to experience their own motivation leading to better performance (Deci, 2017). Empowering employees to make decisions and have control over their work (autonomy), providing those employees with the ability to develop their skills along with mastery (competence), and fostering a sense of community and belonging (relatedness) are key to enhancing employee motivation and performance (Ryan & Deci, 2020). When employees feel a sense of ownership and responsibility for their work, coupled with opportunities for growth and development, they are more likely to be engaged, productive, and committed to achieving organizational objectives (Ryan & Deci, 2000). Aligning workplace practices with the ideologies

of self-determination theory, managers can establish an environment that nurtures intrinsic motivation, leading to improved employee performance and overall organizational success.

II.5.7 Applying Self Determination Theory to Remote Teams

Remote teams, by their nature, often operate in environments that require a high degree of autonomy (Ryan, 2000). The geographical dispersion, differing time zones, and the absence of a centralized physical workspace necessitate that team members take initiative and exercise independent judgment (Franken et al., 2021). To effectively manage and motivate remote teams, leaders must ensure that team members not only have the tools and resources to work autonomously but also feel empowered to do so (Flood, 2019). This entails creating an environment where individuals feel competent in their roles and have the necessary support structures to foster relatedness, even in the absence of face-to-face interactions (Deci et al., 2017).

II.5.8 The Role of Managers in Self Determination Theory

There is an opportunity for middle and senior managers to embed the principles of SDT within their management approaches when overseeing remote teams. Figure 4 provides an illustrative view of the tenets of self-determination theory and the variables that exist for remote employees adapted from Ryan & Deci (2017). Recognizing the intrinsic motivation of team members and aligning tasks with their inherent interests and passions can optimize interaction and productivity (Rajagopalan, 2009). Managers should also prioritize creating systems and feedback loops that reinforce feelings of competence (Kozlowski et al., 2021). Crucially, in a remote setting, managers need to be proactive in nurturing relatedness, ensuring that team members feel connected, valued, and integrated into the organizational fabric (Hoch & Kozlowski, 2014).

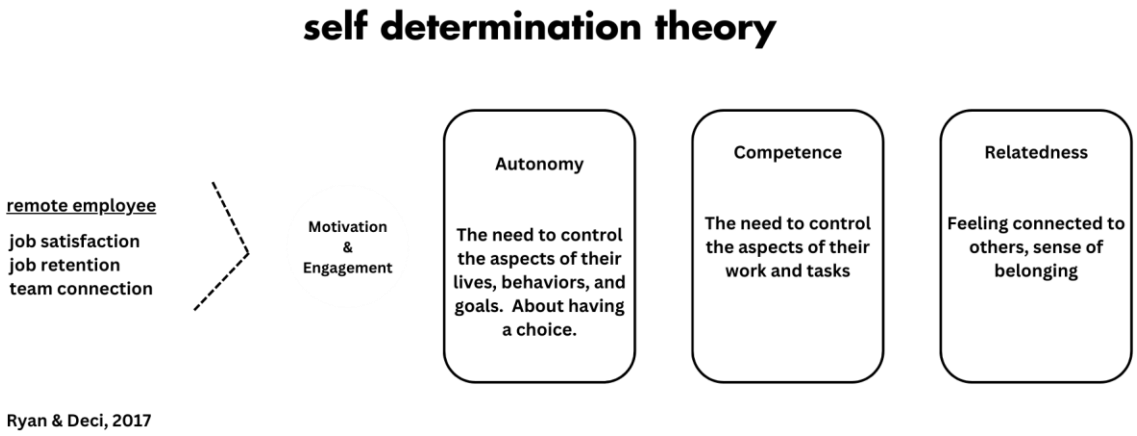

Figure 4. Self Determination Theory

Adapted from: Ryan & Deci (2017)

II.6 Situational Leadership Theory

II.6.1 Origins of Situational Leadership Theory

Situational leadership theory (SLT) is a groundbreaking approach to leadership, emphasizing that there is no "one-size-fits-all" style (Hersey et al., 1979). Is posits that effective leadership is dependent on the readiness or maturity level of its followers (Thompson & Glasø, 2015). Instead, effective leadership is seen as being contingent upon various factors, most notably the readiness and maturity of followers. According to SLT, leaders should adapt their style based on the situation, specifically focusing on the competence and commitment of the individuals being led (Hersey et al., 1979). Hersey and Blanchard (1979) propositioned four distinct leadership styles: Directing (directive behavior); Coaching (directive and supportive behavior); Coaching (supportive behavior); and Delegating (low supportive and directive behavior). The idea is that as followers progress in their abilities and confidence, leaders should

transition from a more directive style to a more delegative one (Thompson & Glasø, 2015). The choice of leadership style depends on the followers' competence and commitment levels. As an example, when team members are new to a task or skill, a directing style characterized by a manager providing specific instructions and closely supervising the employee's performance, may be considered appropriate. As employees continue to increase their competency, the manager may transition their interaction style to coaching, focused more on providing coaching and support while fostering individual growth and development.

II.6.2 "Directing" in Situational Leadership Theory

"Directing" refers to a leadership style where the leader actively engages in two-way communication with their followers to persuade and influence them toward a particular course of action (Graeff, 1997). This style is characterized by a high level of directive behavior coupled with a significant amount of supportive behavior. Directing is more appropriate when followers have moderate competence but lack the necessary commitment or confidence to take action independently (Thompson & Glasø, 2015). In these type of situations, the manager must provide clear direction and guidance while also offering support and encouragement to help followers develop the necessary skills and confidence to achieve their goals (Graeff, 1997). When applying direction in managing remote teams, managers must focus on effectively communicating the rationale behind decisions being made and providing support to facilitate followers' understanding and acceptance of the proposed direction (Maher & Hippel, 2005).

This involves explaining the benefits and implications of the chosen course of action, addressing any concerns or uncertainties, and actively soliciting input and feedback from employees to ensure buy-in and commitment. By engaging in open and on-going transparent communication, managers can build trust with their employees, foster collaboration, and

empower employees to take ownership of their work and contribute to the achievement of organizational objectives (Maher, 2014). Ultimately, directing enables managers to effectively guide and motivate followers toward success, particularly in situations where followers require additional support and guidance to achieve their full potential (Graeff, 1997).

II.6.3 "Coaching" in Situational Leadership Theory

"Coaching" is a style that is defined by high relationship behavior and low task behavior. Participating leadership collaborate with employees in decision-making processes, seeking input, and fostering open communication channels (Hersey, 2014). Coaching managers collaborate with followers in decision-making processes, seeking input, and fostering open communication channels. This approach is suitable when employees have moderate to high competence but may lack full commitment or confidence in their abilities (Machaba et al., 2023). Participating leaders recognize their input and involvement in shaping goals, strategies, and problem-solving approaches.

When employing the participating construct, leaders must cultivate an environment of mutual trust, respect, and collaboration, encouraging employees to contribute their insights openly. Leaders should facilitate open communication, actively listening employees' concerns, areas for improvement and incorporate their input into decision-making processes as appropriate (Gibson et al., 2002). By promoting shared ownership and involvement in decision-making, participating leaders employer their employees to feel invested in the team's success, fostering a sense of autonomy, interaction, and commitment within Situational Leadership (Machaba et al., 2023).

II.6.4 "Supporting" in Situational Leadership Theory

"Supporting" refers to a style that is defined by high task behavior and low relationship behavior (Hersey, 2014). Managers provide clear instruction, specific guidance, and closely supervise followers' performance to ensure tasks are completed according to set standards (Thompson & Glasø, 2015). Supporting is most suitable when followers have low competence and low commitment, indicating a need for structure direction and oversight. In such situations, leaders much take a more directive stance to ensure that followers understand what is expect of them and how to accomplish their task effectively (Hersey, 2014).

Managers applying support must prioritize clarity and precision in communication, providing step-by-step guidance and detailed instructions to facilitate employees' understanding and executive of tasks. Managers should also offer support and reassurance to build their employees' confidence and motivation, despite their limited experience or skill level. By adoption a telling leadership style, managers can effectively guide and support followers through the initial stages of task performance, laying the foundation for skill development and eventual progressing to more autonomous levels of functioning within the Situational Leadership Framework (Thompson & Glasø, 2015).

II.6.5 "Delegating" in Situational Leadership Theory

"Delegating" construct in situational leadership theory represents a leadership style characteristic by low task behavior and low relationship behavior (Hersey et al., 1979). Delegating involves empowering followers with autonomy and decision-making authority, allowing them to take ownership of tasks and make independent choices. Leaders who adopt the delegating style provide minimal guidance and oversight, instead trusting employees to use their skills and judgment to complete tasks effectively (Machaba et al., 2023). This approach is

appropriate for managers to use when employees have a high competency and is highly committed which indicates their readiness for greater autonomy and responsibility for their work (Thompson & Glasø, 2015).

When applying the delegating construct in leadership, managers must establish clear expectation and boundaries, outlining the scope of authority and accountability for employees (Machaba et al., 2023). Leaders should provide necessary resources and support while refraining from micromanaging, allowing followers the freedom to innovate and problem solve (Graeff, 1997). Effective delegation involves fostering a climate of trust and mutual respect, where employees feel empowered to take initiative and exercise their expertise to achieve desired outcomes (Gibson et al., 2002). By embracing the delegating style, managers can leverage the strengths and capabilities of their followers, promoting self-reliance, skill development, and overall team effectiveness with the Situational Leadership framework.

II.6.6 Improving Employee Performance

Situational leadership theory posits that effective leadership adapts to the varying needs and abilities of employees in different situations (Thompson & Glasø, 2015). By tailoring management attribute that match the readiness level of the employee, managers can effectively guide and motivate them toward improved performance (Hersey, 2014). This theory expresses the importance of managers being flexible and responsive, providing the appropriate level of direction, support, and encouragement constructed on the specific circumstances and developmental stage of each employee (Machaba et al., 2023). Managers who understand and apply situational leadership principles can effectively empower their employees, build their confidence and competence, and create an environment conducive to achieving performance goals (Gibson et al., 2002). Adopting a situational leadership approach to managing employees,

managers can optimize employee performance by leveraging the strengths and addressing the developmental needs of each team member, ultimately promoting a culture of growth, collaboration, and success.

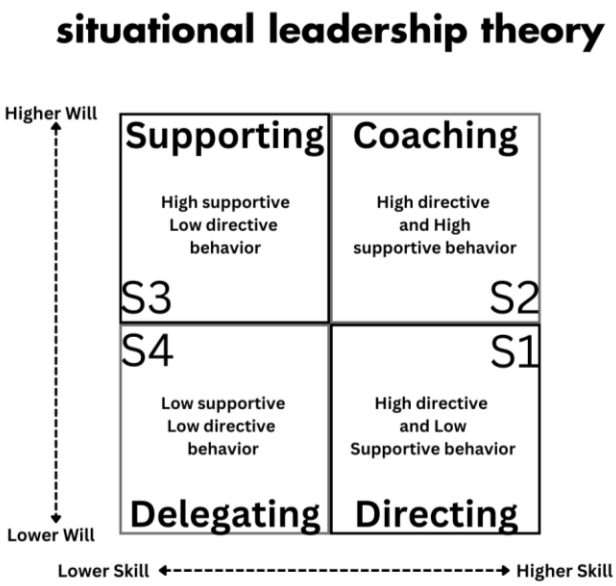

Figure 5. Situational Leadership Theory

Adapted from Graeff (1997)

II.6.7 Situational Leadership in the Context of Remote Teams

The dynamic and varied nature of remote teams makes SLT particularly relevant. Given the geographical spread, cultural diversity, and varying levels of autonomy inherent in remote teams, leaders often grapple with diverse challenges and situations (Hinds & Mortensen, 2005). Figure 5 provides a 2x2 matrix aligning the tenets of situational leadership across both relationship (supportive) and task (directive) behaviors. One team member might be a seasoned expert requiring minimal direction, while another, perhaps new to the team or role, might need a more hands-on approach. Additionally, the absence of a physical shared workspace can often obscure cues that might indicate a team member's need for support or autonomy (DeRosa et al., 2004).

II.7 Transformational Leadership Theory

II.7.1 Origins of Transformational Leadership Theory

Transformational Leadership Theory (TLT) emerged as a significant evolution in understanding how leaders inspire and mobilize their followers towards higher ideals and shared visions. Initially articulated by Burns et al. (1978), the theory contrasts with the transactional leadership style, which is rooted in traditional reward and punishment mechanisms. Transformational leaders inspire their teams by embodying four primary components: idealized influence (role-modeling attributes and behaviors); inspirational motivation (articulating a compelling vision of the future); intellectual stimulation (encouraging someone's innovation and creativity); and individualized consideration (attending to individual team members' needs and fostering their development) (Bass & Riggio, 2006a). Such leaders do not merely engage in transactions; they elevate their followers, seeking to transform their personal and professional paradigms.

II.7.2 Idealized Influence (Charisma)

Transformational leaders serve role models and inspire others through their charismatic nature, storytelling, and integrity. They receive the trust and admiration of their employees by demonstrating high moral and ethical standards as well as by embodying the values and ideals of the organization (Bass, 1998). It is a central construct in transformational leadership theory and involves leaders demonstrating unwavering commitment to their vision and goals, earning the trust, respect, and admiration of their followers (Eagly et al., 2003). Transformational leaders with idealized influence are often described as charismatic and capable of captivating and inspiring others with their vision, passion, and authenticity (Podsakoff et al., 1990).

They are leaders with idealized influence exhibiting a strong sense of purpose and conviction, inspiring employees to rally behind a shared vision and to pursue collective goals with dedication and enthusiasm. They are leaders who lead by example, demonstrating courage, integrity, and selflessness in their actions and decisions (Kuhnert & Lewis, 1987). It is through this charismatic presence and inspirational demeanor that leaders instill confidence and beliefs, empowering employees to overcome obstacles, task risks, and achieve extraordinary results (Podsakoff et al., 1996). Idealized influence not only enhances commitment and loyalty from their employees, but also fosters a sense of unity, cohesion, and shared identity within the organization, driving collective efforts toward a common purpose and vision (Dionne et al., 2004).

II.7.3 Inspirational Motivation

Inspirational motivation is a key construct in the transformational leadership framework, emphasizing the ability for a leader to inspire and motivate employees through a compelling vision of the future (Ayman et al., 2000). Transformational leaders with inspirational motivation articulate a clear and inspiring vision that captivates the imagination of their followers and instills a sense of purpose and direction (Chiu et al., 2016). By creating a vision of what success looks like and articulating the benefits of achieving the vision, leaders ignite a sense of excitement and commitment among their followers, driving them to strive for excellence and pursue ambitious goals (Sinclair et al., 2021).

Transformational leadership exhibiting inspirational motivation goes beyond setting goals; they create a sense of urgency and excitement around achieving them (Meiryani et al., 2022). They communicate high expectations and express confidence in their followers' ability to rise to the challenge, fostering a belief in their potential and capacity for greatness. Through a

transformational leaders words and actions, they inspire followers to overcome obstacles, persevere in the face of adversity, and tap into their inner drive and motivation to achieve remarkable outcomes (Sinclair et al., 2021). Inspirational motivation not only energizes and engages employees but also fosters a collective sense of purpose and unity, aligning individual efforts with the broader vision and mission of the organization (Meiryani et al., 2022).

II.7.4 Intellectual Stimulation

Intellectual stimulation is a fundamental construct within transformational leadership theory, focusing on the leaders ability to stimulate creativity, innovation, and critical thinking among followers (Faupel & Süß, 2019). Transformational leaders who exhibit intellectual stimulation challenge the status quo, question assumptions, and encourage followers to explore new perspectives (Kuhnert & Lewis, 1987). They foster a climate of curiosity and open-mindedness, inviting employees to expand their horizons, think critically, and push the boundaries of conventional thinking.

Leaders who employ intellectual stimulation actively seek out diverse viewpoints and encourage dissenting options, recognizing that innovation often emerges from the varying ideas. They challenge followers to think independently, to question assumptions, and to approach problems from multiple angles (Meiryani et al., 2022). Through thought-provoking questions, stimulating discussions, and opportunities for experimentation and exploration, these leaders empower employees to unleash their creativity and unlock their potential (Sinclair et al., 2021). Intellectual stimulation not only fosters innovation and problem-solving, but also cultivates a sense of empowerment and ownership among followers, as they become actively involved in shaping the direction and outcomes their work (Chou, 2014).

II.7.5 Individualized Consideration

Individualized consideration within transformational leadership theory emphasizes a leader's ability to recognize the unique needs, aspirations, and developmental needs of each employee (Sinclair et al., 2021). Transformational leaders who exhibit individualized consideration behaviors demonstrate genuine concern for the well-being and growth of their followers, treating each individual as a valued member of the team (Walsh et al., 2023). These leaders take time to understand their employees' strengths, weaknesses, and preferences, offering personal support, interaction, and mentoring to help them reach their goals (Meiryani et al., 2022). By acknowledging and respecting the individuality of each employee, these leaders foster a sense of trust, loyalty, and commitment, strengthening the leader-follow relationship and enhancing overall team effectiveness (Chou, 2014).

Leaders who prioritize individualized consideration go beyond a one-size-fits-all approach to leadership, recognizing that different followers have unique needs and motivations (Loyless, 2023). They customize their leadership style and approach to accommodate the employees' preferences and development goals of each, offering support and resources tailored to their specific circumstances (Sinclair et al., 2021). Figure 6 below highlights the key tenets of transformational leadership theory adapted from Northouse (2004) Leadership: Theory and Practice. Whether the need is providing support during challenging times or opportunities for growth, transformational leaders demonstrate empathy, compassion, and attentiveness to the needs of their employees (Sinclair et al., 2021).

II.7.6 Improving Employee Performance

Transformational leadership expresses the role that leaders play in not only inspiring but also motivating their employees to accomplish organizational objectives beyond the employees

self-interests (Sinclair et al., 2021). Leaders who exhibit transformational qualities, such as vision, charisma, intellectual stimulation, and individualized consideration, have been shown to significantly impact employee performance (Bass & Riggio, 2006a). By articulating a compelling vision and fostering a sense of purpose and direction, transformational leaders inspire employees to commit to organizational goals and aspirations (Avolio & Bass, 2002). Moreover, through intellectual stimulation, these leaders encourage creativity, innovation, and continuous learning, empowering employees to challenge their current situation and strive for excellence (Chou, 2014). Additionally, by providing individualized support and coaching, transformational leaders build strong relationships with their employees, instilling confidence, trust, and loyalty (Bass, 1999). Incorporating transformational leadership principles, managers can cultivate a high-performance culture characterized by employee engagement, collaboration, and a shared commitment to success.

II.7.7 Transformational Leadership in Remote Teams

The decentralized nature of remote teams—spread across geographies, cultures, and often time zones—presents a unique leadership challenge, one where traditional leadership models may fall short (Camp et al., 2022). Transformational leadership, with its focus on inspiration, vision, and individual growth, aligns well with the necessities of leading remote teams (Boga & Ensari, 2009). The very absence of a centralized physical office necessitates leadership that transcends boundaries and motivates through vision rather than mere presence (Flood, 2019). For remote teams to function effectively, members must be intrinsically motivated, aligned with the broader organizational vision, and feel personally and professionally invested—precisely the environment that transformational leadership seeks to cultivate (Nilles, 1994).

II.7.8 Implications for Remote Work

For middle and senior managers overseeing remote teams, embracing transformational leadership can be a strategic advantage (Bass, 1998). These leaders are tasked, not just with operational oversight, but also with crafting a compelling narrative that keeps remote teams aligned and motivated. By articulating a clear, inspiring vision, they can create a unifying thread that ties team members together, regardless of geographical distance (Nilles, 1994). Additionally, given the inherent autonomy in remote settings, leaders need to foster an environment of innovation and creativity, wherein team members feel empowered to take initiatives (Boga & Ensari, 2009). Individualized consideration becomes even more crucial in a remote setup; leaders need to offer tailored support, and ensure that every member feels seen, heard, and valued (Flood, 2019).

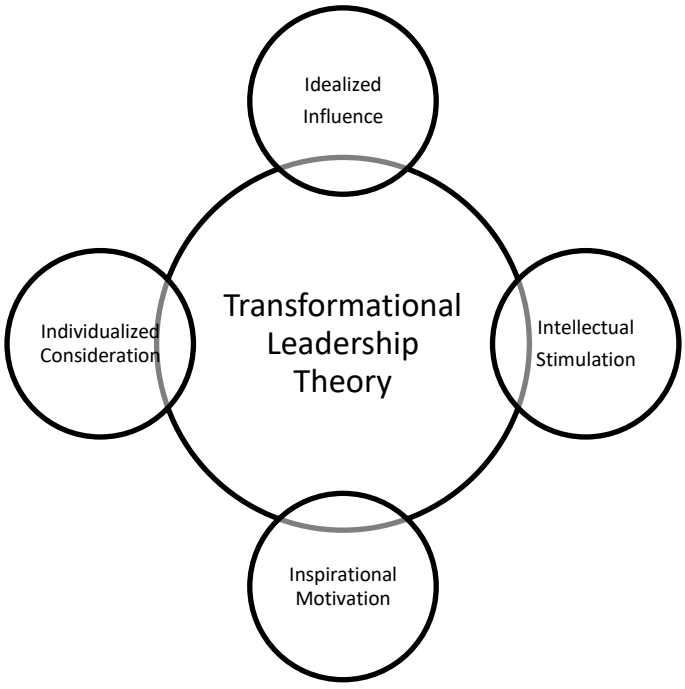

Figure 6. Transformational Leadership Theory Tenets Visual
Adapted from: Northouse (2004) Leadership: Theory and Practice

Table 1 provides an overview of the literary sources utilized to research knowledge into the proposed theoretical frameworks.

Table 1. Theoretical Sources Table

Research Study Topic	Research Focus Area	Sources
Social presence theory (SPT)	SPT states that different media channels are better or worse at making individuals feel that they are connected, because of the difficulty with sharing visual and verbal signals effectively.	(Edwards, 2020; Lenka, 2021b; Marques et al., 2023; Ning Shen & Khalifa, 2008; Osei-Frimpong & McLean, 2018; Weidlich et al., 2022)
Organizational support theory (OST)	Employees develop opinions about how much their organization value their work or cares about their overall wellbeing.	(Baran et al., 2012; Gagné & Deci, 2005; Jimmieson et al., 2008; Kurtessis et al., 2017; Rhoades & Eisenberger, 2002)
Self-determination theory (SDT)	SDT states that motivation is both intrinsic and extrinsic and is based on the cognitive and social development and in individual differences.	(Deci et al., 2017; Deci & Ryan, 1980; Deci & Ryan, 2008; Deci & Ryan, 2012; Deci, 2017; Gagné & Deci, 2005; Nwoko & Yazdani, 2022; Ryan, 2000; Ryan & Deci, 2000, 2020)
Situational leadership theory (SLT)	A leadership framework stating leaders that are effective with their employees will adjust their styles based on how ready or mature their employees are.	(Graeff, 1997; Hersey, 2014; Thompson & Glasø, 2015)
Transformational leadership theory	TLT states that effective leadership can change in the employees establishing a positive change for both the leaders and the employees.	(AlNuaimi et al., 2022; Bass & Riggio, 2006b; Chiu et al., 2016; Hoch & Kozlowski, 2014; Judge & Piccolo, 2004; Kuhnert & Lewis, 1987; Walsh et al., 2023)

II.8 Research Method

Remote work continues to be at the forefront for organizations even as the world has transitioned back to normal after Covid-19 (Margherita & Heikkila, 2021). While we have seen some organizations that have been successful with remote or hybrid work employees, managers have expressed hesitation with these ways of working (Tarca & Bucurean, 2023).

II.9 Research Design and Approach

The research methodology for this study is based on explorative qualitative research focused on collecting best practices across multiple industries and leaders of remote or hybrid teams. Stated by Van De Ven (2000), “Research knowledge of a complex phenomenon advances by comparing the relative contributions of different models.” This study adopts a

hermeneutic phenomenological research design to explore the experiences of managers leading remote or hybrid employees. Hermeneutic phenomenology is chosen for its ability to dive into the subjective interpretations and meanings that individuals ascribe to their experiences (van Manen, 1990).

The hermeneutic nature of the study aligns with the exploratory aim of uncovering nuanced insights into the challenges and successes faced by managers as they aim to increase team engagement and connection in this dynamic context. By leveraging semi-structured interviews and observations, this research seeks to capture the core of the leadership experiences from the perspectives of the study participants, providing a rich and contextualized understanding (Yin, 2009). The focus of this research is to answer the research question:

RQ: What are best practices for managers to elicit high performance from their remote & hybrid employees?

II.9.1 Theoretical Framework

To systematically analyze the various aspects of leadership, organizational support, and social interaction for employees in remote work settings, this study draws on several established theoretical frameworks. Self-determination theory (Deci & Ryan, 2008) serves as a lens to understand the incentive and autonomy of employees in remote work scenarios. Situational leadership theory (Hersey, 2014) guides the examination of how leadership styles may need to adapt to the varying levels of readiness and competence among team members. Transformational leadership theory (Kuhnert & Lewis, 1987) provides insights into the inspirational and visionary aspects of leadership crucial for remote team engagement. Organizational support theory (Rhoades & Eisenberger, 2002) informs the examination of how organizational structures and policies impact employee well-being and job satisfaction in remote settings. Social presence

theory (Weidlich et al., 2022) further enriches the exploration by focusing on the role of collaboration technologies in fostering a sense of connection among remote employees.

II.10 Rationale for Qualitative Approach

A qualitative approach was deemed most suitable for capturing the nuances and depth ofc managerial experiences in leading remote or hybrid teams. Qualitative methods, such as in-depth interviews and observations, enable the collection of context-specific data that goes beyond the quantitative metrics often employed in traditional leadership studies (Bachiochi & Weiner, 2004). A qualitative approach allows for the discovery of new insights emerging from the lived experiences of participants (Corbin & Strauss, 2008). By immersing ourselves in the in-situ reality of managers leading remote teams, I aim to uncover novel perspectives and practices that may contribute to the evolving discourse on effective leadership in contemporary work environments.

II.11 Participant Selection

The targeted study participants for this investigation are comprised of professionals with a firsthand understanding and practical experience in managing remote and/or hybrid teams. The process began with conducting background research aimed at identifying those professional whose backgrounds align closely with the research focus. Out of the twenty-four individuals contacted, twenty responded affirmatively, consenting and scheduling interviews. Overall, the participant selection process employed in this study was systematic, to identify and engage professions across multiple industries to contribute meaningfully to the research objectives.

II.11.1 Criteria for Participant Selection

The selection criteria identified individuals who had managed remote and/or hybrid remote teams, held direct reporting lines, and had experienced working across three distinct time

periods: pre-Covid, during Covid, and post-Covid. Participants selected to support the research study represented diverse fields and industries which included leaders from the banking industry, leaders in academia, leaders from the wholesale industry, leaders within the technology sector, leaders in the marketing industry, as well as leaders within the omnichannel and healthcare industry. To preserve confidentiality and mitigate conflicts of interest, all participants were anonymized using an identifier that included the naming convention of Remote Manager (RM) and a numerical identifier assigned. An example of this identifier is RM1 representing a Client Delivery Services Director within the Healthcare industry. Table 2 provides the anonymized identifier for each participant that was interviewed for the research study.

Specific criteria were also documented to further classify the participants, including their industry, years of experience, current or past leadership roles in remote teams, and their position. Twenty leaders interviewed in this study were across middle and senior management levels (Eisenhardt, 1989). The purposive sampling method was employed on participants that could provide valuable insights into leading remote teams or hybrid remote teams with a focus on garnering insights surrounding team engagement and connection to support the research focus (Mitchell & Clark, 2018).

Table 2. Overview of Research Participants

Participant Identifier Remote Manager (RM)	**Position**	**Industry**	**Gender**
RM1	Director of Technology	Healthcare	Female
RM2	Director of Technology	Academia	Male
RM3	Managing Director of Product	Banking	Male
RM4	CIO of Technology	Academia	Male
RM5	Director of Technology	Technology, Healthcare	Female
RM6	VP of Quality Engineering	Banking	Female
RM7	Director of Technology	Omnichannel	Female
RM8	Healthcare Analyst	Healthcare	Female
RM9	Director of Marketing	Marketing	Female
RM10	Director of Sales	Sales	Male
RM11	Sr. Director of Technology	Wholesale	Male
RM12	Director of Technology	Omnichannel	Female
RM13	Director	Omnichannel	Female
RM14	Program Manager	Technology	Female
RM15	Principal Consultant	Consulting	Male
RM16	Director	Healthcare	Male
RM17	Principal	Technology	Female
RM18	Director	Global Supply Chain	Female
RM19	Manager	Transition Management	Female
RM20	Sr. Director	Technology	Male

II.11.2 Recruitment and Consent Process

Once the selected participants were identified, they received an email with detailed information, which included an introduction of the research study's purpose as well as the research question and expected outcomes. An initial consent form was also provided for their records along with a sample of the interview questions that would be asked during the interview. Transparency and credibility were prioritized, and participants were given the researcher's contact information as well as that of the advisor to address any questions or concerns that may have arisen during or after the data collection process. Participants were guided to schedule a 60-minute interview via Calendly, which facilitated the selection of a date and time for the conversation via Zoom.

II.12 Data Collection and Instruments

II.12.1 Data Instruments

The interview questions were developed for this study and adhered to ethical and scholarly standards, involving the receipt of an exemption status through the Institutional Review Board (IRB) process. The questions used in the interviews were developed built on a comprehensive review of scholarly literature, industry-specific reports, and related articles. The process of crafting interview questions was iterative, drawing on insights gained from extensive literature review and expert input. The initial data collection method leveraged in this study was semi-structured interviews, a strategy recommended for its capacity to yield rich and nuanced data (Evans et al., 2021). To maintain consistency and reliability, participants were provided with interview guidelines as an integral component of the interview protocol. In adherence to best practices outlined by Evans et al. (2021), an interview protocol was shared with participants, elucidating the framework within which semi-structured interviews were conducted.

The principal investigator participated in two interviews, providing valuable coaching and feedback on the interview structure and flow. The interview process commenced with a set of key questions designed to establish a foundation for the discussion. Table 3 provides the initial interview questions there were used to facilitate the interviews. The interview questions explored beyond the interview guide to gather extra pertinent insights that might not have been disclosed (Myers, 2019; Yin, 2009). They contended that the use of probing questions enables researchers to foster a thorough grasp of each participant's perspectives and experiences. Yin (2015) also asserted that the posing of probing questions enables researchers to cultivate a holistic comprehension of participants' perspectives and experiences. This iterative approach not only ensured alignment with research objectives but also allowed for the emergence of unanticipated insights, enriching the depth and breadth of the data collected. Data collection

concluded upon reaching redundancy in responses, with further interviews deemed unjustifiable. (Huberman & Miles, 2002).

Table 3. Research Study Interview Questions

Interview Questions
1. What does the hybrid workplace look like for you and your employees? i. How many team members do you have on distinct teams? ii. Is everyone purely hybrid, fully remote, or something else? 2. In what ways is this different than from before the pandemic? 3. In what ways have you changed the way you manage/lead in response to this new work environment? 4. What have you found to be the most effective ways to lead your teams? 5. What are the biggest challenges you currently face? a. Have you figured out things that help? b. Have you tried things that work well? c. What have you found that is effective for creating trust and interaction with hybrid team? d. What things have not worked as well as expected? 6. What has helped you to grow both as a leader and in your duties driving success in this new setting? 7. What are the ways you help mentor future leaders in a hybrid setting? 8. What skills have you found to be the most important for someone leading hybrid teams? a. What skills are the most important for your team members to have? 9. How do you motivate team members in a hybrid setting? a. What is the difference between motivating those who are onsite and those offsite? 10. What are the most important lessons you can share with others who are leading hybrid teams? 11. What would you most like to know from other people that I am interviewing? 12. Is there anything I should know that I haven't asked a question about?

After each interview was completed, a participant interview packet that consisted of audio files, transcripts, and detailed notes was created. The data organization strategy was designed to align with the study's objectives and anticipated outcomes, ensuring that the coded data would yield meaningful insights. To address the critical aspects of data storage, recovery, and confidentiality, a secure OneDrive file hosting service was used to story the interview packets. This facilitated the storage and easy retrieval of files, notes, transcripts, and all other collected data, aligning with the recommendations of Kamalakannan et al. (2019) for

safeguarding confidential information. The utilization of a third-party service ensured accessibility, ease of use, and enhanced security.

To preserve the anonymity of participant data, a systematic naming convention was adopted. Each participant's packet was labeled consistently with a brief yet descriptive name, expediting the retrieval process while maintaining confidentiality. Within the Microsoft 365 environment, spreadsheets and word documents were leveraged to support ongoing data collection and progress tracking activities. A dedicated spreadsheet was also created to systematically map data across theoretical frameworks and identify key themes emerging from individual participants, fostering a comprehensive and organized approach to analysis.

II.12.2 Data Coding Process

Data coding commenced by systematically loading all notes, transcriptions, and recordings into a meticulously organized file structure aligning with each participant unique identifier. The analytical process encompassed the steps of data collection, interpretation, and the identification of key themes (Yin, 2015). After each interview was completed, the audio file was translated leveraging AI in Zoom. The recordings were then downloaded from the Zoom platform and saved with the file name supporting the anonymized identifier recorded for the participant (e.g. RM1_Interview Recording_MMYYYY) and placed into the corresponding interview packet. NVivo's Speech to Text feature was used for a second transcription, followed by a manual review of each transcription output to ensure accuracy. This final transcription file was then uploaded into NVivo (Clarivate, 2021) to perform the overall coding and analysis to identify the initial key themes to support the research study. This software supported categorizing, further transcribing, and coding the amassed data, facilitating in-depth exploration of emergent themes.

In the initial coding structure for this research study utilizing NVivo, the primary objective was to systematically organize and analyze the qualitative data collected during the research process. This coding structure served as the foundation for identifying the initial patterns, themes, and relationships within the data, ultimately facilitating the extraction of meaningful insights and conclusions. The initial coding process involved breaking down the raw data collected from the participants transcripts into smaller, more manageable segments, or codes, which were then categorized based on their relevance to the research objectives. These codes also captured the overall concepts, ideas, opinions, or experiences expressed by participants in the study. Table 4 displays the preliminary codes analyzed and reviewed to document recurrent themes, relevant content, and any supporting notes.

Table 4. Initial Coding Structure

Code Name	Description of Code
1. Benefits of Remote Work	The opportunities to maximize remote employees
2. Best Practices	Key activities that support successful remote work
3. Challenges with Remote Work	Key activities that impact remote work success
4. Collaboration Tools	Software applications that enable successful interaction
5. Company Culture	How does the company show up to remote employees?
6. Cultural Nuances	Are there any cultural impacts that need to be recorded?
7. Interaction	What are the different modalities of interaction? Manager, Team, Organization
8. Generational Differences	Are there any age differences that are being surfaced?
9. In Office Benefits	What are the benefits identified from working in office?
10. Insights Garnered	Are there any key insights that are being shared?
11. Meeting Type	What are the different types of meetings that occur? (Team Manager, Company)
12. Key Quotes	Are there any key quotes being shared?
13. Time Period	What are the time periods being discussed? (Pre-Covid, During Covid, Post-Covid)
14. Work Setting	What are the work settings being discussed? Remote, Hybrid, In Office

A secondary review and analysis of the data was conducted leading to codes being decomposed to isolate key interaction models. Table 5 displays the code construct developed through this exercise that included the relevant interactions.

Table 5. Key Interaction Model Code Structure

Code	Description
Organization to Manager	Interaction model between the manager and the organization
Manager to Employee	Interaction model between the manager and the remote employee
Teammate to Teammate	Interaction model between team members
Employee to Task	Interaction model between the employee and their assigned work
Organization to Employee	Interaction model between the organization and the remote employee

To further analyze and explore the data, a third coding exercise was conducted to establish themes and categories that were presented to support the theories discussed in the literature review. Table 6 provides the coding structure developed to support mapping of the data to organizational support along with mapping to the tenets of the theory.

Table 6. Organizational Support Theory Code Structure

Code	Description
Organizational Support Theory	Employees develop opinions about how much their organization value their work or cares about their overall wellbeing.
Communication Climate	The openness and transparency of communication within the organization.
Organizational Justice	The perception of fairness in the delivery of rewards, assets, and decision-making processes.
Perceived Organizational Support	The extent that someone believes that their organization cares about their work or overall well-being.
Training & Development Opportunities	The extent to which organizations invest in enhancing the skills and knowledge of their employees.
Supportive Supervision	The perception of employees regarding the support they receive from their immediate supervisors.
Work-life Balance	Organizational policies and practices aimed at helping employees balance their work and personal lives.

Table 7 provides the coding structure developed to support mapping of the data to self-determination along with mapping to the tenets of the theory.

Table 7. Self Determination Theory Based Code Structure

Code	Description
Self Determination Theory	SDT states that motivation is both intrinsic and extrinsic and is based on the cognitive and social development and in individual differences.
Autonomy	The necessity for one to experience conduct as self-serving and stemming from oneself.
Competence	Competence involves feeling the effects of their own interactions with their environment and experiencing a sense of mastery.
Extrinsic Motivation	Extrinsic motivation is the undertaking of employees to receive external rewards or to avoid any type of retribution.
Intrinsic Motivation	Intrinsic motivation includes appealing in deeds for their own sake, driven by internal factors such as interest, enjoyment, or a sense of purpose.
Relatedness	The necessity to feel connected, to care or be cared for by other people.

Table 8 provides the coding structure developed to support mapping of the data to situational leadership along with mapping to the tenets of the theory.

Table 8. Situational Leadership Theory Based Code Structure

Code	Description
Situational Leadership Theory	A leadership framework stating leaders that are effective with their employees will adjust their styles based on how ready or mature their employees are.
Directing	In this style, leaders provide specific steps and closely supervise work performance. This is used when employees have low competence and high commitment but lack the necessary skills.
Supporting	Leaders focus more on supporting and facilitating follower involvement in making key decisions or solving critical problems. This is for employees with moderate to high competence but low commitment to performing the work.
Coaching	The leader will engage in both task instruction and socio-emotional support. This approach is used when employees have a low to moderate competence but vary in their commitment.
Delegating	The leader provides minimal direction and support, enabling their employees to own execution and decision-making. This approach works best when employees have high competency and are high committed.

Table 9 provides the coding structure developed to support mapping of the data to social presence along with mapping to the tenets of the theory.

Table 9. Social Presence Theory Code Structure

Code	Description
Social presence theory	Explores the degree to which communication technologies can replicate the sense of human connection and immediacy experienced within more physical interactions. The importance of visible cues, such as body language and vocal tones, in establishing a feeling of existence and intimacy within mediated communication environments is emphasized.
Media Richness	This is not aligned to Media Richness Theory but only focused on the richness of the medias or communication vehicles used by Remote Employees.

Table 10 provides the coding structure developed to supporting mapping to the final theory researched for this study, transformational leadership along with the mapping to the tenets of the theory.

Table 10. Transformational Leadership Theory Code Constructs

Code	Description
Transformational Leadership Theory	TLT states that effective leadership can change in the employees establishing a positive change for both the leaders and the employees.
Idealized Influence (or Charisma)	Leaders serve as role models for their employees where they demonstrate high morales along with ethical standards, as well as inspiring trust and admiration.
Individualized Consideration	Leaders demonstrate empathy, consideration, and concern for the employees' individual needs, aspirations, and development.
Inspirational Motivation	Leaders communicate a compelling vision, setting challenging goals, as well as creating direction and purpose.
Intellectual Stimulation	How a leader can encourage their employees to think critically, challenge the everyday expectations, and identify new ideas and perspectives.

This systematic coding structure, established a process to effectively manage the qualitative data, uncover hidden patterns and trends, and generate rich, nuanced findings that could contribute to the broader research inquiry.

II.12.3 Methodological Reflections

This qualitative study, operated within the framework of doctoral research, assumes a crucial role in adhering to ethical standards and navigating the inherent limitations of the study. A comprehensive understanding of the researcher's responsibilities, encompassing the selection of an appropriate theoretical framework, research design, methodology, interview conduct, and result interpretation, is paramount (AF Segerstad, 2021).

The researcher, guided by ethical principles, recognizes the challenge of maintaining objectivity and responsibility in presenting findings that may challenge pre-existing beliefs or personal experiences (AF Segerstad, 2021). The potential misalignment between participants' views and the research findings, as well as variations among participants' perspectives, adds complexity to the research process (Caretta & Perez, 2019). Acknowledging and addressing these challenges is essential for maintaining the integrity of the study. In adhering to Lincoln and Guba's (1985) four-dimensional criteria and integrating methodologies recommended by

Caretta and Perez (2019), this qualitative study stands fortified in its commitment to credibility, dependability, confirmability, and transferability, ensuring the integrity and reliability of its findings.

II.13 Findings & Analysis

This study investigates the best practices eliciting high performance from remote and hybrid employees through five theoretical perspectives: social presence theory, organizational support theory, self-determination theory, situational leadership theory, and transformational leadership theory. During this analysis, situational leadership theory emerged as the most pragmatic theory based on the level of supporting data from the interview participants and because of its specific focus on approaches managers can take to harness employee capabilities, taking into consideration their skills and their readiness to take on their work.

While usually depicted as a 2x2 matrix, the counterclockwise progression from directing (i.e., instructing employees what to do and how to do it) to delegating (i.e., assigning a job-to-be-done and trusting an employee's own devices to accomplish the goal), the progression of employee capability can be viewed as an implicit maturity model. Prior research provides robust normative guidelines for managing employees based on this maturity. The data in this study further support the guidelines originally proposed by Hersey et al. (1979). At the same time, however, this study has identified a missing dimension to situational leadership. The experiences of study participants managing remote and hybrid employees evidenced a divide in the ability of a manager to apply situational leadership. This divide is based on the level of experiential maturity that the manager has in overseeing the work of remote and/or hybrid employees.

What stands out in the study data is the challenge and frustration experienced by managers who were new to managing remote and hybrid employees. The Senior Director of

Transformation reflects on the unique demands, stating, "*This has been a new dynamic with managing remote employees who want something completely different than in-person employees.*"

The turn to remote management is a paradigm shift, as echoed by the Manager of Transition, who acknowledges the need for heightened focus and adaptability, stating, "*I thought that I was a great manager until I had to manage remote teams.*"

The Senior Director of Product highlights the lack of preparation and support for managers thrust into remote leadership roles, emphasizing, "*It was assumed that we would know what to do... It was a lot*." Amidst these challenges, the Director Marketing reflects on the necessity of building relationships in a remote setting, recognizing the need to "*learn how to manage remotely while flying the plane*." A Senior Leader in Product Management also stated the lack of preparation with managing remote teams, "*Before COVID, I was managing a team across multiple offices in the U.S., requiring the use of virtual meeting applications (e.g., Microsoft Teams) to remain in contact with my team members. I received no formal training or guidance from my company or leadership to improve or optimize collaboration [with remote employees] in this virtual environment."*

While those new to managing remote and hybrid teams faced challenges in understanding the needs of their employees, managers with experience with these types of teams are not challenged by the workplace modality and contextual needs of their employees. For example, a Director of Program Management explains: *"This new dynamic of leading remote employees has had some nuances but as a seasoned manager, it has been somewhat an easy transition."* A Director of Client Services explains how even in the virtual space, *"My management will*

actually be crafted based on who that person is, where they are located, what their needs are, because everyone will be different."

Now that the data from this research has been examined and insights garnered, it is essential to translate these finds into actionable guidelines. Distilling the information gleaned from the analysis, key patterns and trends were discovered illuminating the path forward. From these, practical strategies and guidelines can be developed to enable middle and senior managers to navigate managing remote and/or hybrid employees effectively. The next section provides an overview of the proposed extension of SLT, as well as, normative and practical guidelines for effectively managing employees.

What inductively emerges from the data is the need for another dimension to be included within the framework posited by SLT. This leads to the first finding from this study, which is a reconceptualization of SLT to include not just the maturity of the person being managed, but the maturity (based on experience) of the manager. Figure 7 provides an example of a 4x2 matrix outlining the combination of these two new dimensions as employee and manager maturity is explored. The first axis positions the traditional four categories of employee from low maturity to high maturity in the following order: those who need directing are at the first, lowest level of maturity, those who need coaching are at the second level of maturity, those who need supporting are at the third level of maturity, and those to whom tasks and projects can be delegated are at the 4th, highest level of maturity. The other axis positions managers' maturity, based on whether they are relatively novice at leading people in the current context (low maturity), or whether they are experienced at managing people in the current context (high maturity). For this study, the context was that of remote and hybrid work.

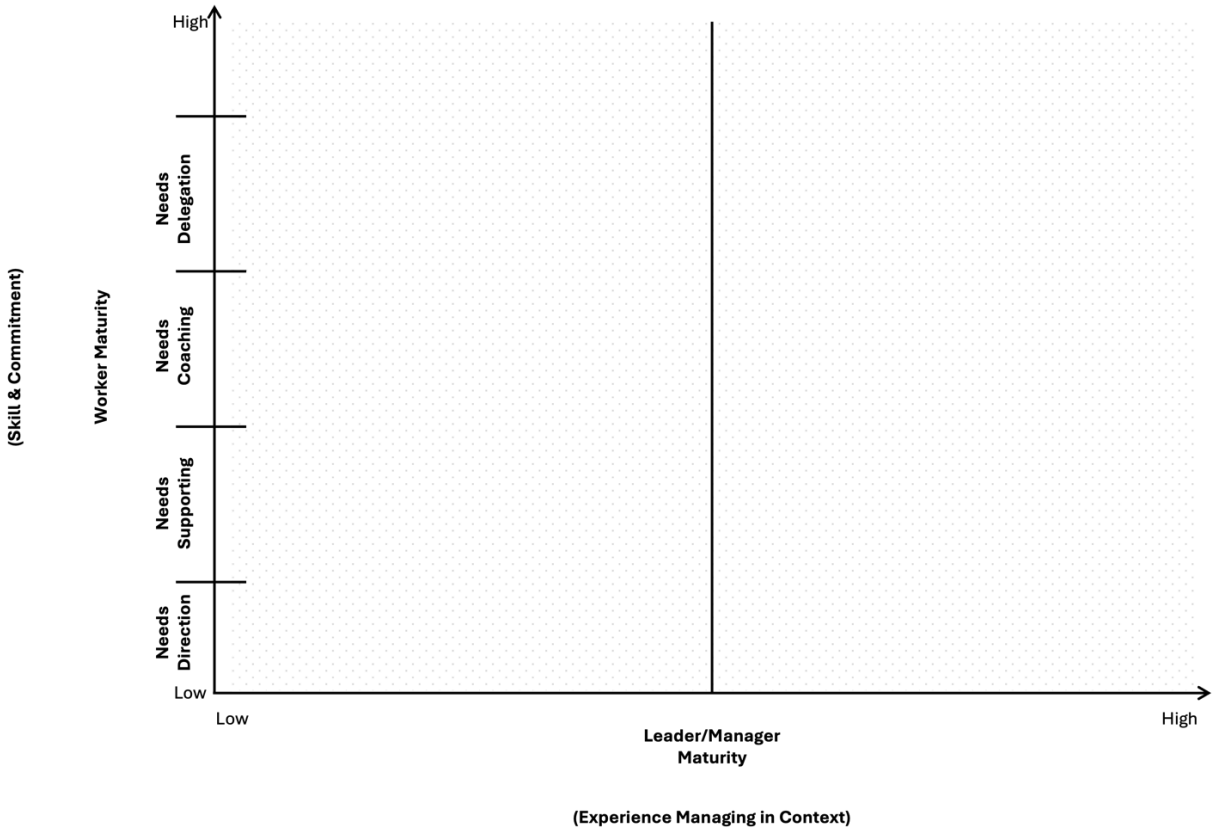

Figure 7. Sample Situational Leadership Capability Grid

Applying a hermeneutic approach to the context of experienced versus inexperienced managers, enabled the identification of shared best practices as well as best practices that will likely bring positive results regardless of the manager's contextual experience. The insights garnered from the inexperienced managers as they gained experience in their new context helps complete the hermeneutic circle by contextualizing this experience and identifying actionable guidance for lesser experienced managers to follow.

The best practices for eliciting high performance, the application of directing, supporting, coaching, or delegating, will vary *depending on the maturity of the leader*. Guidelines for practitioners appear below, based on whether the manager is experienced or inexperienced within the remote and hybrid work context. Figure 8 overlays the normative guidelines of

experienced managers across the 2x2 matrix of situational leadership theory. It provides the actionable steps described above aligned to the tenets of directing through delegating.

II.13.1 Guidelines for Experienced Managers

For experienced / mature managers, the normative guidelines for applying the appropriate management style based on the skills and willingness of each employee remains unchanged as presented in existing research. These managers understand the significance of adjusting their management approach to meet the needs and capabilities of their employees. Drawing from their experience of managing varying employees, they recognize that some employees may thrive with greater autonomy and responsibility, while others may require more guidance and support. By leveraging a flexible management style, these seasoned leaders can effectively empower and motivate their employees, more trust, increased collaboration and co-creation, and continuous improvement.

Experienced / mature managers prioritize clear communication, continuous feedback, and personalized development opportunities to maximize each employee's potential and contribute to overall team success. Through their skilled application of situational management principles grounded in research and practical experience, these managers serve as effective mentors and role models, inspiring their team members to excel and grow professionally. Active and empathetic listening is a crucial skill for remote managers to build trust. The need to be an engaged manager who not only effectively communicates but also listens to remote employees' needs was key to how seasoned managers engaged with their remote employees. It provides the actionable steps described above aligned to the tenets of directing through delegating.

Normative Guidelines for managing employees with high directive, low supportive behavior (Directing)

- ***Daily Manager-Employee Syncs:*** Coordinate daily connections with a focused agenda to ensure alignment and daily outcomes are identified.

- ***Task Prioritization:*** Provide guidelines for prioritizing tasks to ensure alignment with organizational goals and deadlines. Guidelines for managing those who need coaching

Normative Guidelines for managing employees with high directive, high supportive behavior (Coaching)

- ***Goal Setting and Individual Development Plans:*** Collaborate with employees to set clear and achievable goals aligned with their role and career aspirations.
- ***Skill-building Opportunities:*** Provide employees with access to development, workshops, and career resources to help develop relevant skills and capabilities.

Normative Guidelines for managing employees with low directive, high supportive behavior (Supporting)

- ***Transparent and Open Communication:*** Conduct open and honest communication with employees.
- ***Accessible Resources and Assistance:*** Guarantee that remote and/or hybrid employees have the resources, materials, and assistance they need to execute their roles effectively.

Normative Guidelines for managing employees with low directive, low supportive behavior (Delegating)

- ***Accountability and Ownership:*** Give ownership of delegated tasks and accountability for their outcomes to more seasoned remote employees. Give them authority to deliver and move forward
- ***Continuous Feedback and Recognition:*** Provide constructive feedback and recognition for completed delegated tasks.

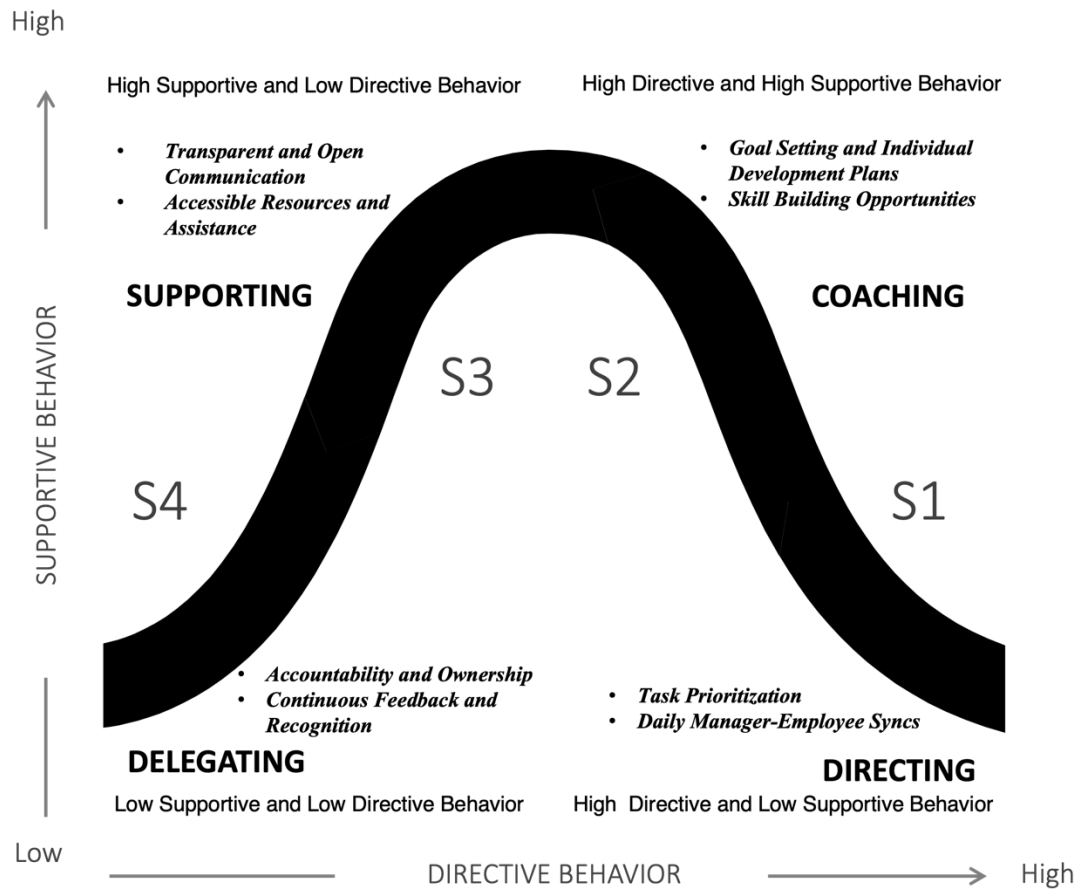

Figure 8. Experienced Situational Leadership Grid

Guidelines for managing employees with high directive, low supportive behavior (Directing)

Experienced Managers Key Activity

Experienced managers engaged with employees who align with the directing guidance of situational leadership often:

- Tell employees what to work on and how to do perform the work

Inexperienced Managers Key Activities

Inexperienced managers perform the same action as those of experienced managers but takes it a step further. They begin as the same step as above but extend into an additional step:

- Ask the employee how they will perform the work
    - If the outcome aligns to their expectation, they enable the employee to move forward

- If the outcome does not align to their expectation, they tell the employees how to perform the work

Guidelines for managing employees with high directive, high supportive behavior (Coaching)

Experienced Managers Key Activity

Experienced managers engaged with employees who align with the directing guidance of situational leadership often:

- Frequent check-ins
- Scheduled deadlines
- Actively remove impediments
- Provide answers to questions

Inexperienced Managers Key Activities

Inexperienced managers perform the same action as those of experienced managers but takes it a step further. They begin as the same step as above but extend into additional steps:

- Ask about impediments/challenges employee is facing
- Ask "What can I do for you?"

Guidelines for managing employees with low directive, high supportive behavior (Supporting)

Experienced Managers Key Activities

Experienced managers engaged with employees who align with the directing guidance of situational leadership often:

- Be a "cheerleader" for their employees
- Provide answers to their questions

Inexperienced Managers Key Activities

Inexperienced managers perform the same action as those of experienced managers but takes it a step further. They begin as the same steps as above but extend into an additional step:

- Co-create the work with their employees (*more labor intensive for the manager)*

Guidelines for managing employees with low directive, low supportive behavior (Delegating)

Experienced Managers Key Activities

Experienced managers engaged with employees who align with the directing guidance of situational leadership often:

- Provide accountability and ownership of the work
- Decentralize decision making authority

Inexperienced Managers Key Activities

Inexperienced managers perform the same action as those of experienced managers but takes it a step further. They begin as the same steps as above but extend into additional steps:

- Ask "What do you need from me to be successful?"
- Ask "What are you focused on?"

Extending upon the best practices for eliciting high performance, the application of directing, supporting, coaching, or delegating, additional guidance is outlined for novice or inexperienced managers. Figure 9 displays the additional guidelines for inexperienced managers in blue across the newly created 4x2 matrix proposing an extension of situational leadership theory.

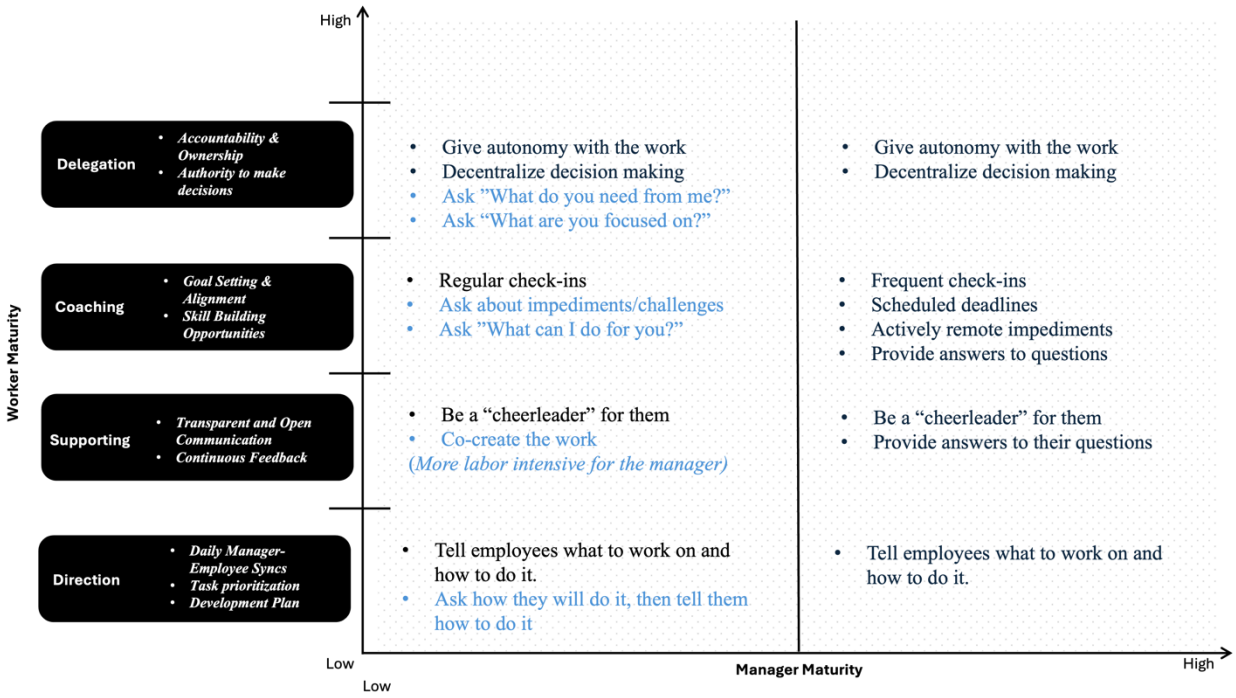

Figure 9. Activity based Situational Leadership Capability Grid

II.14 Discussion & Conclusion

The validity of the extension of situational leadership theory can be examined based on three criteria: integration of the theory (logical coherence), relative explanatory power, and theoretical and practical relevance (Corbin & Strauss, 2008; Glaser, 1978). Integration of the theory refers to whether the theory has logically coherent connections between the various tenets of the theory. SLT's previously established components (Hersey et al., 1979) are based on two different but materially important aspects of employee performance that drive results, and therefore need to be considered by a manager's choice of approach to maximizing employee performance. A person needs the requisite skills in order to perform a task. Those employees without the skills cannot perform a job unless they are shown specifically how to do it, whereas those with higher command of the requisite skills needs less how-to guidance from their manager. Those with mastery of their skills need no instructions on how to complete the work they are assigned. While skills are an important factor, the likelihood that an employee completes assigned work is based on how committed they are to completing the work.

As such, someone with low commitment requires a manager's intervention to motivate them to complete the work, whereas someone with high commitment does not need someone else to stimulate their interest in the work. Skills and competence can be mapped on a spectrum of high to low, which gives us four general categories of employees based on skills and commitment: S1) low skill, high commitment; S2) moderate skills, low commitment; S3) high skills, variable commitment; and S4) high competence, high commitment. Traditional applications of these situational leadership classifications employ a defacto maturity model for employees that guides managers on what managerial approaches to take with their employees. Low employee skills require managers to give precise instructions (i.e., micromanage) the way an employee performs tasks. Low employee commitment requires managers to act as a

cheerleader to motivate an employee to perform the tasks they have the skills to do. Variable employee commitment requires managers to provide more hands-on support and clear deadlines to ensure that the employees complete the task.

When a manager is in a new context, such as when a manager who has in-person management experience is supervising remote or hybrid employees for the first time, he or she may have difficulty assessing the skill level of employees within the context. The manager may also have difficulty identifying the level of commitment of the employees. Additionally, given the new context, the manager may not be sure exactly how best to provide direction and support. Therefore, the inclusion of the consideration of manager maturity is a logically coherent fit in a maturity model used for prescriptive managerial advice.

The proposed theoretical extension to situational leadership demonstrates its relative explanatory power by adapting it to the complexities of modern-day organizational dynamics. By integrating the dimension of management maturity into the framework, the extended theory provides valuable insights into the importance of adapting management styles to match employees' developmental readiness and builds upon this by recognizing that situational factors extend beyond just employees' readiness levels to encompass broader organizational contexts, such as manager maturity and their ability to identify the stage of their remote employees. This provides greater relative explanatory power than traditional situational leadership, which is focused on the needs of employees and explains what managers need to do to supervise them effectively.

The addition of management maturity into the tenets of situational leadership theory also holds significant theoretical relevance by enriching the understanding of management dynamics and enhancing the applicability of the framework in varying organizational changes.

Incorporating management maturity, SLT expands its scope beyond solely focusing on employee readiness levels to encompass the developmental journey of managers themselves. Incorporating management maturity into SLT enhances its theoretical relevance because it breaks from being a manager-deterministic epistemology in which managers are assumed to always be more knowledgeable and know better than those they manage. This extension into SLT also encourages managers to embrace a co-creation and collaboration role, rather than simply dictating directives from the top-down.

The extension of situational leadership theory also holds significant practical relevance in managing remote employees, particularly in the context of fostering effective communication, providing tailored support and guidance, as well as promoting accountability. Given the diverse challenges inherent in remote work environments, where employees may face varying levels of task complexity, skills and/or competency challenges, along with isolation, managers need to align their management style to meet the ever-changing needs of each employee and their dynamic situations. Situational leadership theory also offers a flexible framework for remote managers to assess employees' readiness and competence in navigating remote work challenges, thereby guiding the delegation of tasks, provision of support, and adjustment of communication strategies accordingly. By managers tailoring their management approach to the specific demands and needs of the remote or hybrid employee, managers can empower their teams to thrive in their roles, maintain high levels of motivation and engagement, and contribute effectively to organizational success despite physical distance and logistical constraints.

II.15 Limitations & Further Research

While this research offers valuable insights into managing remote and/or hybrid employees, several limitations inherent in this study must be acknowledged. The Covid-era

context is a limitation due to its generalizability. Applying the findings of this study into a context that extends beyond remote work and Covid-19 could identify other applications to apply the extension of situational leadership.

Additionally, the generalizability of the theoretical extensions may be limited to "knowledge workers" or "knowledge work context". The interviewees in this management study were within an in office, professional setting. An opportunity exists for further research to apply the discussed extension to situational leadership within the warehousing, construction, or distribution center environments. Third, expanding to a more in-depth study within the healthcare or academia sector could provide an additional lens into the application of situational leadership theory within establishing an understanding of how SLT can adapt to organizational structures that exist outside of the private sector.

Scholars can contribute to a deeper understanding of effective management in remote work and/or hybrid contexts and provide practical and relevant guidance for companies navigating the challenges and opportunities of the remote work landscape. Despite these limitations, this study serves as a foundational exploration of managing remote employees within the framework of situational leadership theory, offering valuable understandings and directions for future research within this context.

Appendix: Literature Review Research Topics

Research Study Topic	Research Focus Area	Sources
"Remote Work" or "Hybrid Work"	The dynamics, advantages, and challenges with remote work	(Appelbaum et al., 2015; Ardichvili et al., 2016; Arunprasad et al., 2022; Bailey & Kurland, 2002; Barney, 1991; Barney & Clark, 2007; Brynjolfsson, 2020; Byrd, 2022); Konrad-Märk (2021), (Camp et al., 2022), (Donati et al., 2021), (Eddleston & Mulki, 2015), (Franken et al., 2021), (Choudhury et al., 2020), (Donati et al., 2021), (Eddleston & Mulki, 2015), (Gajendran & Harrison, 2007), (Gibson et al., 2002), (Hinds & Mortensen, 2005), (Konrad-Märk, 2021), (O'Leary & Cummings, 2007), (Popovici, 2020), (van Meel, 2011); (Taser et al., 2022) ; (Kozlowski et al., 2021)
Virtual Leadership or virtual management	How managers lead remote employees and teams	(Flood, 2019), (Byrd, 2019), (Camp et al., 2022), (Neufeld et al., 2010), (Nilles, 1994), (Reiter-Palmon et al., 2021), (Zigurs, 2003) ; (Dorin et al., 2021; Hoch & Kozlowski, 2014); (Malhotra et al., 2007); (Loyless, 2023)
Team Engagement	How managers enable team engagement amongst remote workers	(Arunprasad et al., 2022; Bell & Kozlowski, 2002; Reagans & McEvily, 2003)
Connection & Interaction	How employees connect with and engage with managers	(Muse et al., 2008) Arunprasad et al., 2022; Galanti et al., 2021)
Effective Remote Work Communication	How effective communication enables remote employees and teams	(Awada et al., 2021; Berger et al., 1975)

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III CHAPTER THREE:
RITE OF PASSAGE:
A NEW APPROACH TO LEADING DIGITAL BUSINESS TRANSFORMATION

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III.1 Abstract

Digital transformations require changes to strategy, processes and human resources as much as technology. A successful transformation requires converting an organization's human resources from legacy talent to a future-ready, digitally empowered workforce. We describe how staffing company ASK Consulting's CEO successfully guided his employees through sweeping technology-driven organizational changes by treating the transformation as an employee rite of passage. Drawing on details from the case study and a century of anthropological insight, we explain how to structure a rite of passage and provide actionable guidelines for change agents to act as masters of ceremonies who shape the employee experience and lead employees through digital transformations.[1,2]

Keywords: Digital transformation, digital innovation, change management, organizational change, human resources management, information systems strategy, rite of passage

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III.2 Managing Digital Business Transformations as Rites of Passage

An ever-increasing number of organizations are undergoing digital business transformations[3], which are major changes made possible by information technology that redefine a firm's internal operations and significantly change the way a business interacts with its customers. Digital transformations are forms of change management[4], but many of the time-tested techniques for planning and managing change deliver underwhelming results or simply fail to achieve the most fundamental objectives because they focus on business transformation. While many of these methods include considerations for managing people, a transformed company must redefine not only its strategies, business models and technology but must also transform its people.

People's definitions of success, their methods for solving problems and their approach to innovation can become an inextricable part of the company's culture. These can provide strategic advantages to organizations[5]. However, these often become frozen in place, especially when they have led to success in the past. A successful digital transformation, however,

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[3] Approximately 70% of companies are undergoing some form of digital transformation per Fitzgerald S, Jiminez D-Z, Findling S, et al. *IDC FutureScape: Worldwide Digital Transformation 2021 Predictions*: IDC; 2020.

[4] The difference between digital transformation and other change management efforts is the focus on leveraging technology to create new opportunities for growth and innovation. Other change management efforts may focus on improving processes or restructuring the organization, but they do not necessarily involve a comprehensive integration of digital technology into all aspects of the business. See Eden R, Burton-Jones A, Casey V, Draheim M. Digital transformation requires workforce transformation. *MIS Quarterly Executive.* 2019;18(1):1-17. See also World Economic Forum. (2016). Digital Transformation Initiative: Executive Summary.

[5] A company's culture can provide a strategic competitive advantage when it has a strong set of core values that are rare in the marketplace and is difficult for others to imitate. More information about the strategic advantages of culture can be found in Barney JB. Organizational culture: can it be a source of sustained competitive advantage? *Academy of management review.* 1986;11(3):656-665.

redefines an organization, which can require re-envisioning many elements engrained in the company's culture. This can present seemingly insurmountable challenges to transformational initiatives. Some companies find that they cannot overcome the degree to which organizations – particularly the people – are frozen in a certain mindset and an outdated way of doing business.

Those directing digital transformations need an approach that can help transform their people from legacy talent to a future-ready, digitally enabled workforce. To transform people within an organization, change agents should manage the employees' experiences as a rite of passage. Such rites have been used for thousands of years to transform people and to identify those who cannot complete the transformation. In business, transformed people lead and work in a transformed enterprise, while those who do not complete the rite of passage remain with a legacy business unit or are released to pursue a position in another untransformed company. This article draws upon anthropological insights into rites of passage and an illustrative case study of a staffing company that underwent a digital transformation.

III.2.1 Rites of Passage

Rites of passage follow a simple structure that is archetypal to the way humans experience life. Rites of passage follow a consistent, universal three-stage process of separation, transition and integration. The first stage separates an initiate from the status quo and from his or her current role and status within a group or society. During the second *liminal,* or transitional stage, a person adapts to fit a new role or position. In the final stage, a person integrates himself or herself with the new role or new status within a new group or society.[6]

[6] The concept of rites of passage, along with the phases of separation, transition, and integration was introduced by Arnold Van Gennep and first translated into English in Van Gennep A. The rites of passage, trans. Monika B. Vizedom and Gabrielle L. Caffee. *Chicago: Univ of Chicago Press.* 1960;11:94-95.

To transition from one type of person or member of one group to another, individuals must separate themselves from the other members of their current group. While the decision to participate is made at the individual level, rites of passage are shared among those undergoing the transition. They share a process of conversion in which they foster a sense of community, not based on previous roles or status, but based on this shared process. The 'passage' involves a trial, whether real or ceremonial, during which the boundaries of what is normal and taken for granted are broken and replaced with an expansive mindset in which a different reality becomes possible. Once the mind opens to new opportunities, a rite of passage guides initiates to a shared conceptualization of norms and structures. The initiates need a guide – a master of ceremonies – to usher them through the process.[7,8] Long-established rites of passage have well-established rituals; however, nascent rites of passage may necessitate master of ceremonies improvisation as they guide others.[9]

A key aspect of rites of passage is that the new status or membership in the new group does not include everyone. Those who cannot complete the journey, which requires divesting themselves of previous habits and mindsets, will not be part of the new group or enjoy the new

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[7] The importance of making a clean break from previous routines and practices, the need for a trial or test and the critical need for a person to guide others through the transition process (i.e. a "master of ceremonies") are described in Szakolczai A. Liminality and experience: Structuring transitory situations and transformative events. *International Political Anthropology.* 2009;2(1):141-172.

[8] An elaboration of the importance of the liminal (transitional) period of a rite of passage, including how it opens a person to change, and then guides a person through an identity change can be found in Turner V. Betwixt and between: The liminal period in rites de passage. *The forest of symbols: Aspects of Ndembu ritual.* 1967;93:111.

[9] Many rites of passage have well-defined ceremonial processes, but the ceremonies associated with new rites of passage, the master of ceremonies may improvise the ceremonies he or she is leading. See Prashantham S, Floyd SW. Navigating liminality in new venture internationalization. *Journal of Business Venturing.* May 2019;34(3):513-527.

status. For those who have completed the transformational journey, rites of integration help to solidify the new structures and rules. They internalize and integrate these new norms, which become taken-for-granted aspects of their new positions and new group norms.

III.2.2 Case Study: ASK Consulting

ASK Consulting underwent a digital business transformation in which its CEO led employees through a rite of passage in which those who successfully completed the rite thrived in a vastly different organization, while those who did not complete the rite were no longer able to be part of the firm.

III.2.3 About ASK Consulting

ASK Consulting recruits and places IT, engineering, finance and accounting professionals within other firms that operate in The United States. Most of their placements are for long-term assignments, not temporary positions. ASK provides American-based contract employees who work within client firms and who are supervised by the clients. Clients include tech companies, financial institutions, industrial firms, and government agencies. ASK clients all are Fortune 1000 companies. ASK bills clients hourly for the services of their contractors, adding a surcharge to create their gross profit margin. For over a decade, ASK has experienced consistent year-over-year growth. The company is organized into three main departments: business development, recruitment and human resources management. ASK's clients are based in the United States; however, the majority of the company's operational staff live in India. ASK's headquarters is in metropolitan Atlanta, GA (USA), while three branch offices employ hundreds of people in India. The senior executives and business development (sales) professionals are based in the USA. Backend operations, client account management, and employee recruitment are based in India. Because ASK must recruit IT, engineering, finance

and accounting professionals in order to fill client needs, recruiters make up the majority of ASK's operational workforce.

At the turn of the decade, although its business was based on placing highly skilled digital professionals at other companies, ASK was itself a paper-pushing, in-person organization based on manual processes. It developed solid relationships with client firms, but its customer relationships were managed without the help of sophisticated software or digital processes. While it used digital recruiting platforms to attract skilled job candidates, the processes for screening, interviewing and onboarding employees were highly manual. In early 2020, Manish Karani, ASK's CEO, made the existential decision to break from the past and undergo a rapid digital business transformation. The transformation was an emergent response to the global pandemic, requiring extensive improvisational leadership. ASK adapted its technology, operating processes and customer engagements. For ASK, adopting new technology and designing new business processes was the easy part. The marketplace offered as-a-service applications and infrastructure. Karani personally oversaw the programming of applications to automate the search for candidates with the appropriate skills to fill client positions. He created workflow automation applications to replace pen and paper processes. The biggest challenge for Karani was not managing the technology but guiding his employees through the transformation.

During this rapid transition, Karani acted as a master of ceremonies, leading his employees through a rite of passage that separated them from their current structures and norms, supported them through a period of transition in which they adopted new ways of doing business and embraced new values, and internalized the new practices and mindset as the new normal. Karani presented a digital vision to unify the efforts of everyone at the company: become a company that operates at digital scale and speed with unmatched per-person productivity. He

created the policies that drove the company and guided employees through the transformation. He became a highly visible presence to employees, increasing his communication and the sense that he was involved in the day-to-day activities of company staff. He offered encouragement and guidance on how to navigate the company's changes.

Those who completed the transition are part of the transformed ASK Consulting; however, those who did not complete the journey – whether declining to participate or because they could not let go of the old norms, processes and structures – were not able to be part of the transformed organization.

III.2.4 Rites of Separation

In order for people to undergo a major change to the status quo, they must separate from the routine. The most poignant separation is a territorial passage, a change in physical location is both literal and symbolic. At ASK, global lockdowns provided this first key step in transforming their workforce. Karani sent all employees home to work and provided them with the technology and equipment they needed to work from home. A human resources executive explains the Indian workforce's experience: "They had to go back to their town or village and they had no way to come back."

The relocation of the entire workforce did more than separate employees from their physical offices. This physical separation provided literal separation from their environment but more importantly, from the customary managerial practices and usual business processes. People were separated from their teammates, managers and clients.

A senior director describes the change in interpersonal interactions caused by the office closures: "Oh, my God! What I would do to go back to water cooler talk to finding out what is

going on right and who's doing what. It also you helps you decompress when you share 'I just had a crazy day.'"

Manish Karani explains the magnitude of this separation: "We are a sales-driven industry. Sales-driven industries have worked for hundreds of years in a bullpen-type environment. Open floor. Everyone's loud. Everybody's feeding off each other's energy. And that completely changed." He shares how this territorial passage affected the attitude of his employees: "I'm completely disconnected. I don't have that energy. I don't know what everybody's doing. The camaraderie that feeds a lot of the success is gone."

Not only was the camaraderie from close proximity changed, but many of ASK's India-based employees faced new bullpen-like operating conditions as they worked from their living rooms and kitchen tables along with everyone else in their household, all of whom were also sent home to work.

ASK managers and staff were separated from their regular day-to-day business processes and interactions. The normal manage-by-sight approach to supervising subordinates disappeared. The ability to know what everyone was doing in real-time and to provide help whenever needed was gone. And employees similarly lost their ability to get immediate feedback or assistance.

Salespeople were separated from their primary sales and business development opportunities. Karani explains the magnitude of the separation from the norms and processes used by his sales force. He says: "The sales life has changed. We can no longer meet with the clients we have. We're not able to attend any conferences, networking events, lunches, dinners, or happy hours."

Some employees faced a separation from traditional job duties so they could become open to the new roles and responsibilities required by a transforming organization. For example,

an operations executive managed nearly 100 people focused on client relationship management and client delivery management, which is finding and hiring appropriately skilled people to work with the client. After the transformation, he no longer managed anyone. He explains: "Now my work role is completely different. What I'm doing now is focusing on automation and helping my team be more efficient with the help of AI and data…. So in my team now, I'm at zero team members because there's a big shift."

The territorial separation, separation from coworkers and managers, and separation from standard operating procedures and regular business processes provided the "open space" for ASK employees to transform how they related to coworkers, business processes, and the way they related to the company itself. This separation allowed them to enter the liminal, or transition stage, of their transformational journey.

III.2.5 Rites of Transition

During the transitional stage, the master of ceremonies must foster a sense of community, cultivate an expansive mindset, establish new norms and structures, and provide a test or trial in which participants must prove themselves ready and able to be part of a new community[10]. This liminal phase serves two key purposes: help people transform and filter out those who cannot successfully complete the transformation.

[10] The liminal stage of a rite of passage doesn't just involve changes within individuals. The individuals change alongside others embarking on the rite of passage. By transforming, they become part of a new community of other converts. For more information, see Szakolczai A. Liminality and experience: Structuring transitory situations and transformative events. *International Political Anthropology.* 2009;2(1):141-172.

III.2.6 New Sense of Community

Key to a rite of passage is that all those undergoing the journey foster a sense of community. Regardless of their status or position before beginning the rite, all ASK employees were initiates undergoing a shared process. They found a form of equality because they all were essentially novices undergoing this experience together.

Everyone at ASK shared equality in their uncertainty. A C-level executive describes that he was as uncertain about whether he would be able to weather the company's rapid transformation. CEO and master of ceremonies Karani explains how the uncertainty had an equalizing effect throughout ASK's workforce: "You know, emotionally, psychologically everyone was worried."

As the master of ceremonies, Karani emphasized this equality among ASK employees through formal policies and by emphasizing the sharedness of experiences during the transition. For the first half year of the transition, the compensation structure changed for everyone at the company. Everyone's base pay was decreased by 10-15% while commissions were doubled.

The pay cut was introduced so that ASK could retain employees who were having trouble adjusting to remote work and the company's new business practices. The policy reallocated financial resources to cover the cost of employees experiencing a productivity slump so that they would have more time to adapt. Company executives and top performing employees took the same pay cuts as those with middling performance. A senior executive contextualizes the sacrifice for the communal good: "I felt like a part of my salary was going [away], but it was going for good. I am trying to save somebody's job, so that was something really good."

During the transition, the company made transparent evaluative and performance metrics for all within the company to see. No longer did managers have different performance data than everyone else within the organization. A Senior Director explains: "Letting them know with full

transparency – here's the numbers. We're dropping here, we're gaining here. We need to shift to focus here. Showing them the good, the bad, the ugly." He elaborates: "Everyone knew where everyone was. They know how many hires they had. They knew where their profitability was. They knew everything."

The shift from the physical, pen-and-paper office setting to a digital workspace brought with it a new sense of community and humanized everyone, regardless of position within the company. A senior director explains: "there's nobody who is working in a corporate environment that is leveraging virtual meetings who hasn't had at least five embarrassing moments over the last two years, right?" He details the effects at ASK: "Everyone knows everyone's kids because they'll be walking around. They know their pets. I think every person I know I've seen the laundry sitting behind them. […] It's humanized people."

Regardless of their status or position before beginning the rite, all ASK employees were initiates undergoing a common process. They found a form of equality because they all were essentially novices undergoing this journey together. By undergoing the shared experience guided by Karani, they develop a new sense of community.

The transformation of ASK was going to be substantial. Within a short time, the company's day-to-day operations would be unrecognizable vis-à-vis the firm as it was at the beginning of 2020. The people would have to change alongside the company. Although based on a different continent than the majority of employees and traditionally focused on strategic issues rather than daily operations, Karani made himself a highly visible presence so that all the employees could more easily follow his lead. At the most basic level, Karani began direct email communication with employees at all levels of the organization and had direct phone calls with account managers in India. Pre-transformation, he communicated through various levels of

managers and supervisors rather than directly. Every day he held a videoconference call with a team to answer questions and address concerns. Each day he made himself available to a new team so that everyone had direct access to him. He hosted regularly recurring, company-wide update sessions to discuss company progress and to personally express how valuable ASK employees were. He directly taught employees to use the digital tools he built. And employee issues of concern were escalated to him so he could personally address them.

To include everyone his transformative journey, Karani's increased visibility made him a presence in people's homes. This required Karani to learn new skills and adopt new approaches to leading. He explains: "I needed to update my [communication] skills and be more mindful about managing, mentoring and guiding people remotely. Keeping in mind that now every individual was dealing with the personal situation and personal environment around them." A senior recruiter based in India explains how Karani was a visible master of ceremonies guiding them through a collective experience, making the individuals undergoing the transformation feel part of a collective whole. She recalls how he made people feel part of a family-like group when he called via phone and video: "How is your family? Is your family OK? Do we need any support? […] So, you know, it's like a family that works together. I now feel I have two families." A human resources executive provides an illustrative example. She explains: "It was it was really amazing for me to see, when Manish sent out an email after the project to my onboarding team. Appreciating them, how much effort they have taken, and how appreciative he is about the efforts we have taken. My entire team was giggling the entire day, thinking that we got this email from the CEO… People were keeping that so close to their heart."

III.2.7 New Expansive Mindset

Faced with profound changes, employees shifted from a status-quo mindset to one that was reflective and creative. CEO Karani explains: "I have seen that in some of my team members, made them a lot more open-minded like their perspective changed. And so naturally now they are much more open to new ideas and trying new things." Encouraged by Karani, people became more open-minded to redesigning policies and processes and to trying new ideas. A senior account manager explains: "We look at the pandemic as an opportunity, not something that crashed. We looked at what we did to get back to the basics and what we were doing internally to make ourselves better."

Karani directed the company to take a deep look at its existing processes with a mindset to use artificial intelligence and other technologies to make its operations better by doing things differently, not just by automating their existing routines. A senior account manager elaborates: We looked at what we did to get back to the basics and what we were doing internally to make ourselves better. […] The other part of it is that we started developing those technologies like AI that didn't exist beforehand. We looked it as an opportunity to do what we do better, whereas we weren't just doing the stuff that we had been doing."

Managers began to take a more data-driven approach to management. As new digital tools came online, they replaced the intuitive observational management with analytics to identify the best practices of high performers and used these insights to coach new employees. ASK adopted sales call automation tools like RingCentral and sales call analytics tools like Gong and Wingman (now called Clari Copilot) that would automatically condense conversation transcripts into key points and would enable the comparison of salespeople's conversation style and word choice, enabling text analytics to identify effective sales techniques that could be shared with the entire business development team.

Employees accustomed to close management had to embrace more self-management because they were no longer in a bullpen environment. They needed to find motivation without the constant presence of a cheerleading manager. While technological improvements allowed for employee monitoring and analysis of employee behavior, Karani consciously chose to use the tools for learning and coaching employees rather than as a micromanagement tool. His approach nurtured expansive mindsets rather than constricted ways of thinking through management by metrics.

ASK's digital transformation required employees to develop an expansive mindset, but not everyone at the company was able to adopt an appropriate mindset. These people were unable to stay with the company. A C-level executive explains: "Unfortunately, I had to let people go. They just weren't able to adapt, and we were able to find people that were a little more creative." He gives an example of a business development person who was with company for 13 years but was unwilling to adapt. His success had been based on finding managers at client companies at lunch in their break rooms, or as they headed out the door for lunch, and finding out what new positions they needed to fill. These traditional methods that previously made him successful were not compatible with ASK's new digital processes. He could not adapt and thus could not complete the rite of passage and was released from his employment at ASK.

III.2.8 New Norms & Structures

Karani's digital initiatives did not simply digitize existing business process. Instead, they fundamentally changed the way the company does business, affecting every aspect of the company, from recruiting staff to place at client companies, to managing their operational processes, to developing customer relationships. With expansive mindsets, ASK employees

were positioned to adopt business practices that enabled the company to operate at digital speed and scale with remarkable gains in per-person productivity.

In a digital environment, the supervision and management of employees became more hands-off. Communication among peers for entry- and mid-level employees became more infrequent. At the same time, communication and management became less ad-hoc and much more formalized. Without the ad-hoc communication facilitated by bullpen work environments, regularly scheduled touch points became the norm. An operations executive explains:

"[E]arlier when they are working from office, they were hardly having one meeting in a day.

They are surrounded by the same team members, so it was ongoing meeting kind of thing. If they had a question, they would have just asked their team lead, and it would have answered. What we are doing now is having them to do three scrum calls every day with the team. Team leads are connecting with the team three times in a day morning, afternoon and the in the evening…so that we are just making sure that people are connected, and the manager is or team lead is aware of what the team is doing.…"

ASK Consulting's digital transformation leveraged technology to change the fundamental practices in all core operational departments (human resources, business development and recruiting). Tables 11 and 12 provide an overview to the technological and operational process changes at the company.

Table 11. Technology used and tasks performed before the ASK's transformation

	Business Development	Human Resources	Recruiting
Tech Used	Office 365, Zoom, Telephone, Text message, Email	Office 365, Telephone, Text message, Email	Office 365, Telephone, Text message, Email
Work Practices	Manage client data in Excel spreadsheets and Access databases Identify prospective clients through word of mouth, internet searches, business news Initiate new relationships with "wine & dine" face-to-face meetings Use email and phone correspondence to maintain relationships, anchored with periodic "wine-and-dine" meetings	Manage workflow using Excel spreadsheets and Access databases Send forms and document requests via email Receive scans of completed forms and required documents via email Print paperwork and store in filing cabinets Answer new hire employment questions via phone and email	Manually adapt job requirements to keywords Manually search for candidates using company résumé database and online recruiting sites using keyword search Email and/or text potential job candidates Answer questions / discuss job details with candidates who respond to solicitation Evaluate candidate suitability using checklist and professional intuition Email offer to selected candidate(s)
Performance measurement criteria	New Accounts Opened	No of Associates Onboarded	No of Searches No of Job Placements

Table 12. Technology used and tasks performed after the ASK's transformation

	Business Development	Human Resources	Recruiting
Tech Used	Office 365, Zoom, Telephone, Text message, Email RingCentral (communication & collaboration app) Wingman & Gong (sales call analytics apps) Accuick (ASK's proprietary CRM system integrated with other tools)	Office 365, Telephone, Text message, Email OVA (ASK's internally-built onboarding workflow management system)	Office 365, Telephone, Text message, Email R Assorted scripting tools programmed in Python and JavaScript RingCentral (communication & collaboration app) Wingman & Gong (sales call analytics apps) Accuick (ASK's internally-built CRM system)
Work Practices	Identify prospective clients through word of mouth Request members of existing network to recommend and refer new clients (i.e. actively leverage existing client and professional networks) Initiate new relationships via videoconference	Send OVA log-in credentials to new employees Process automation: integration of data collection forms and direct smartphone camera uploads of document images Automatically sync client staffing data with employee information Automatically sync employee data with payroll processor	Produce short video descriptions of jobs, including anticipated FAQs Create prescreening questions for interested prospects Present job details and answer questions in real-time webcast with potential hires For single-hire positions: Answer questions / discuss job details with candidates who

	Business Development	Human Resources	Recruiting
	Process automation: Identify prospective through scripted internet searches AI-enabled: Identify best practices for requesting introductions to potential clients and for closing deals via videoconference Resuming in 2022: Initiate new relationships and maintain current clients with "wine & dine" face-to-face meetings	AI-enabled: Interactive chatbot providing information about required documentation and how to complete data forms	respond to solicitation and pass pre-screening AI-enabled process automation: Generate job requirement keywords Search internet and internal database for candidates Email and/or text prospective candidates Chatbot screens candidate and schedules interview Identify best practices for presenting information to and answer questions from prospects to increase the likelihood of job applying for ASK job and successful client placement
Performance Metrics	New Account s Opened Y/Y Growth (Existing Accounts)	No of Associates Onboarded Time to Onboard Associate	No of Searches No of Job Placements Successful Placement Ratio

Table 11 shows that before the transformation, ASK Consulting relied on standard technology and applications to communicate and to manage operations. The company functioned by using Microsoft Office, making telephone calls, and by sending text messages and email. Processes were highly manual. Even when using applications like Excel and Access, data entry was manual. Electronic communications were printed and filed in paper filing cabinets. Table 12 shows that the transformed organization required ASK employees to adopt new norms and accept new structures. ASK Consulting functioned much differently, relying on business process automation and AI-enabled tools that became the foundation for new ways of doing business.

An operations executive explains: "We look at this era as an AI era. So we make sure that whatever anyone is doing repeatedly, we look at how we can automate it and remove that administrative burden from the team so they can be more productive with the same effort." CEO Karani elaborates: "we automated a lot of the processes, several processes that you know we had

to take a look at. You know: things that can be automated, things that can be streamlined. And for things that were redundant we implemented AI and automation."

Table 12 shows ASK's new norms and structures involved substantive changes to the technology and operational processes used by the business development, human resources, and recruiting departments at the company.

III.2.9 Business Development Norms & Structures

ASK's digitization moved business development activities into cyberspace, requiring different ways of attracting and interacting with clients. Gone was the in-person "wine and dine" practice that incentivized clients to meet with ASK's business development people. In person, face-to-face interaction is a quick way to build trust with new acquaintances. It is not difficult to get face time with prospective clients when you offered them a free lunch or dinner at their favorite (and expensive) restaurant. Prospective clients could fit you in during their meal break. In the digitized world, however, cold calling falls flat. Few people are willing to spend their lunch break dining at their desk during a Zoom call with someone they don't know. It is easy to ignore phone calls and email from unfamiliar people. While ASK always relied on its network of clients to spread positive word of mouth, the digitized ASK needed to rely much more heavily on leveraging its existing relationships to get introductions to new prospective clients. This requires more active relationship engagement with existing clients and faster and more frequent correspondence with potential clients in order to build the trust and rapport that traditionally would be built quickly with in-person contact.

Pre-transformation, business development managers and supervisors were able to observe their sales staff in a bullpen environment and could manage by intuition. Salespeople could 'learn through osmosis' by observing directly the techniques of the highest performing team

members and adopting some of the best practices they observed firsthand. Much of the coaching provided by managers and most standard sales practices were based on intuition and tacit knowledge gained from experience and direct observation. While this approach had served ASK well prior to the transformation, the transformed company embraced a more scientific, data-driven approach to developing sales staff.

III.2.10 Human Resources Norms & Structures

ASK's human resources department has the necessary job of onboarding all the skilled professionals who will be contracted out to client firms. Before the transformation, this was a largely manual, paper-based process. Employment paperwork was sent to prospective employees via email and tracked using Excel spreadsheets. The process flow was disjointed, with different documents being managed independently and aggregated by being printed out and placed in a manila folder within a physical filing cabinet. It also required job candidates to print, sign, scan, and email forms back to ASK. When new hires had paperwork questions or other inquiries, a member of the HR team spoke with them via telephone. Tracking employee paperwork and communicating with new hires was time intensive and could create a procedural bottleneck, slowing the speed with which a new hire could begin working at a client company (and thus generate revenue for ASK).

At the beginning of ASK's transformation, the HR staff dropped from ten people to four. This coincided with an upswing in the number of employees to onboard. CEO Manish Karani and ASK's technology staff developed a paperless onboarding process automation application.[11]

[11] After completing its digital transformation, ASK Consulting has created a separate technology company that sells its onboarding process management application as software-as-a-service. Details about the application can be found at https://www.ova.work.

The new system frees time formerly spent chasing and tracking paperwork. Offer letters, background checks, as well as state and federal employment forms are all managed in a regulatory-compliant paperless software application. Users can use any device to complete forms and upload photos of required identification documents. The system manages workflow and provides an AI chatbot that guides job applicants and new hires through the appropriate processes. Basic functions such as reminders and follow-up messages that were formerly performed manually are now automated. The application provides dashboards to help HR personnel focus their attention where human interventions are most needed. The application also synchronizes this data with the payroll provider, eliminating redundant data entry by ASK employees. This new approach to onboarding frees significant amounts employee time, allowing HR personnel to onboard many more people than before. It also cuts the time it takes for job applicants and new hires complete their paperwork. The average time to onboard a new employee has dropped by three days.

III.2.11 Recruiting Norms & Structures

ASK's core business is staffing firms with highly skilled professionals, requiring constant recruiting of these specialists. Before the transformation, for each job recruiters would review client requirements and manually create a checklist to evaluate potential job candidates. Recruiters then conducted largely manual keyword searches to identify prospective clients, a time-consuming process with a low success rate for identifying people who both had the necessary skills and were likely to leave their current job to work for one of ASK's clients. ASK recruiters would conduct a screening conversation via telephone with every prospective job candidate to see if they were an optimal fit for the open position at the client company. When

candidates qualified for and expressed interest in a particular job, a recruiter would email the formal offer to them.

The number of recruiters dropped during the early days of the transformation, but the number of jobs to fill at client firms increased geometrically. Manual processes were no longer sufficient, so the ASK recruiters leveraged information technology to scale up its operations.

ASK substantially automated most of its recruiting processes and now leverages advanced analytics to streamline the search for those hired to work for clients. For example, ASK now leverages the data from existing clients to automate the search for the most suitable candidates. An operations executive explains: "we have 6 million plus résumés in our database, and we have access to all the job boards and we have a lot of applicants as well." He explains the other side of the matching process: "if it is a client whom we are servicing for ten years, we know when they will hire whom and what type of candidate they will like based on people who got selected through us. Based on that, we have come up with this criteria and search strategy." ASK applies machine learning and analytics to find the most suitable matches, dramatically lowering the time needed to locate a suitable candidate while increasing the precision that the selected candidate will accept a job offer. Recruiters can now focus more of their efforts on finding workers for new clients, for whom they lack sufficient data to automate the search as extensively.

ASK has automated the initial screening as well as the interview scheduling process. An operations executive explains:

"We have built our own chatbot which would interact with the candidates and schedule the call with the recruiter. We have fed it based on 20 plus years of experience in this industry. We know what type of questions would be asked from the candidate, just like an interactive

voice response system like when you call a banker, how the initial 4-5 questions are standard for you to be directed to the right person. We did the same stuff which helped us reduce the load on recruiters by making too many calls to reach the right people. We were sending messages based on whatever response they give. We were segregating them and scheduling the call with the candidate."

While certain positions still require one-on-one interviews, the company has adopted new recruiting techniques, such as video job descriptions and online group seminars to screen potential candidates. When they have multiple job openings to staff within a client firm, ASK would interview dozens, even hundreds of people in an online seminar, then make job offers after the session. In one instance, when recruiting people for logistics and supply chain support roles, ASK extended job offers to 1300 seminar participants, of which 830 accepted the job offers.

ASK accomplishes this by identifying suitable job prospects and contacting them via text and email. The message includes a 30-60 second embedded video in which the recruiter explains the jobs and provides answers to many questions the candidate will likely ask. Interested job candidates follow a web link to answer screening questions. If they pass the real-time screening, they can sign up for an online information session hosted in real-time by ASK employees. During the information session, ASK gives the job details and answers questions from the prescreened attendees. At the end of the session, these prescreened job candidates are extended job offers and can accept the job (i.e., formally apply) online. This hiring process applies progressive funneling made possible by candidate identification algorithms. Only a small subset of those contacted will attend the information session. (See Appendix B for more details.)

Using algorithms makes it possible to identify enough suitable candidates for this process to work at a large scale.

III.2.12 Test or Trial

During the rites of transition, participants share a sense of community with each other, embrace an expansive mindset and adopt new norms and structures. The transition is not complete, however, unless participants successfully pass a test or trial. This can be literal, such as embarking on a dangerous trek through the wilderness or a Marine passing the crucible test in bootcamp. It can also be more figurative, such as completing an exam or ritual. Not everyone will successfully complete the trial. Only those who pass the trial can become part of the transformed community.

While come might view ASK's transformation itself as an extended trial that tested fortitude and adaptability, a rite of passage requires a specific test to determine whether participants have successfully transformed themselves. ASK used objective performance measures to determine whether employees had changed alongside the company. Those who embraced the new mindset and ASK's new, highly productive digital business processes were more successful than ever. Those who did not fully adapt alongside the company, however, could not reach their performance goals and were released from ASK Consulting. (See Table 12 above for employee performance metrics.)

III.2.13 Rites of Integration

For the rite of passage to be complete, ASK's employee need to integrate and internalize the new norms not just as "a new normal" but as their new normal. Karani implemented three key signals to those who successfully transformed with the company. These signals were intended to cement the new status quo in the minds of those who successfully completed the

transformational journey. The first rite of integration was the restoration of the traditional pay structure. This signaled the end of the transition from the old ASK into its new digitally-powered identity. While change is inevitable and constant, the rapid, intentional redefinition of the company and its people, had reached its new normal.

The second signal was the permanent closure of the offices in India. The permanent closures made it clear that there was no going back to the old way. The new way was the way forward. The closures were Karani's strategic decision to integrate work from home into the "new normal" of the transformed company, not for cost savings reasons. ASK still pays rent, insurance, utilities and other operating costs associated with the unused office space. The company will not renew the leases when they expire.

The third signal was the expansion of the ASK workforce. Karani led the effort to restaff the company and backfill many positions that were vacated by those who did not complete the rite of passage. New hires were people who fit the new ASK community and company culture.[12] They were trained by those who successfully underwent the rite of passage, reinforcing the new norms with the transformed employees while instilling them within the new recruits.

III.2.14 Transformational Outcomes

Although ASK Consulting's digital transformation was in reaction to a pandemic-created context rather than a plan meticulously crafted for years prior to execution, the transformation has accomplished the goals that are hard to achieve by even the most rigorously preplanned digital initiatives. The company accomplishes more with less because it now operates at digital speed and digital scale. For example, the company filled 4.37 times as many client jobs in the

[12] To be clearer, ASK's hiring significantly accelerated after the rite of transition was completed. The company, however, did hire employees during the rite of transition.

first half of 2021 than it did during the first half of 2019. ASK accomplished that with only a fraction of the employees.

Table 13 details the staffing levels during the transformation, including the employee backfilling of the transformed company.

Table 13. Number of jobs filled based on the 2019 pre-transformation baseline

	Business Development	Human Resources	Recruiting
Location	USA	USA & India	India
Jan 2020	10	10	381
Dec 2020	8	4	157
Dec 2021	14	10	324

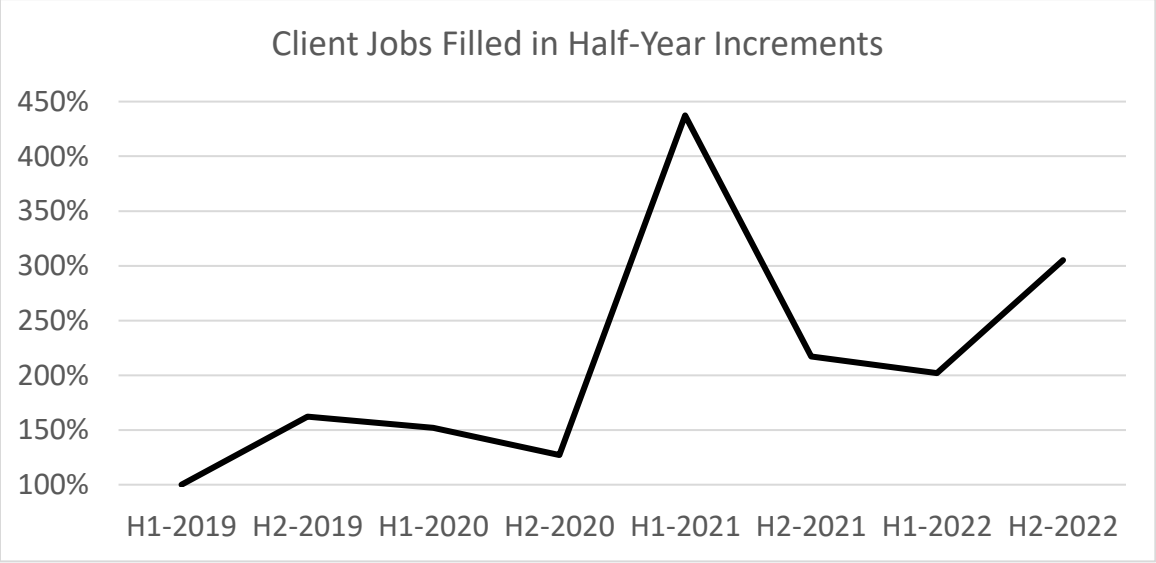

Figure 10. Number of jobs filled based on the 2019 pre-transformation baseline

The company had experienced steady revenue growth for the decade before its transformation, but the effects of increased efficiencies and digital scale can be seen in Figure

11, which shows the company's revenue increase vis-à-vis a 2019 baseline.

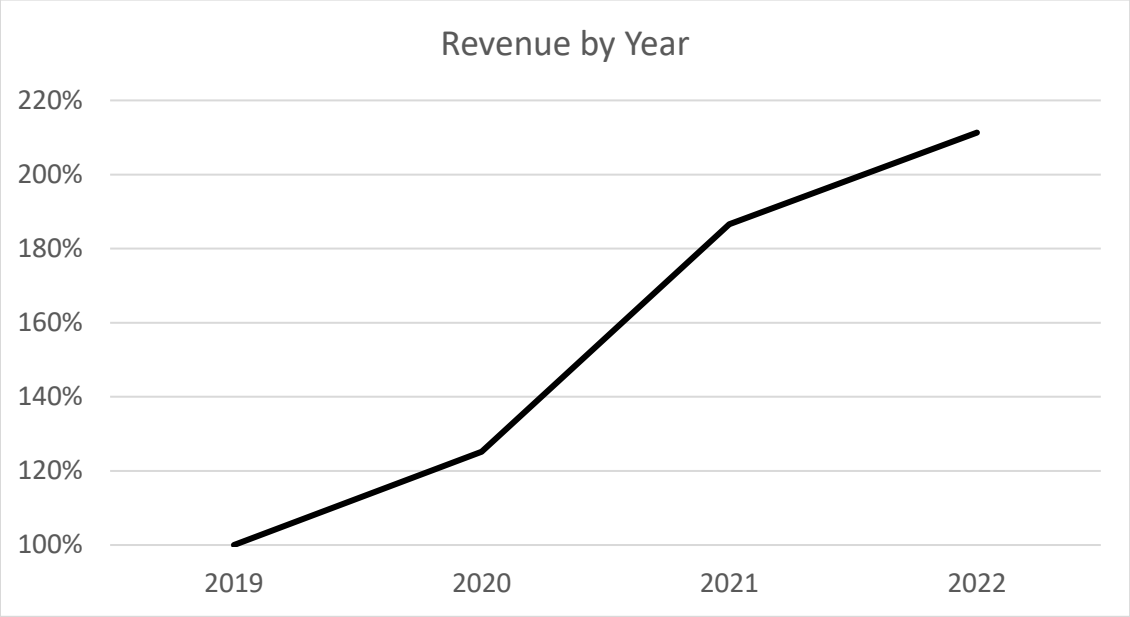

Figure 11. Annual revenue growth based on 2019 baseline.

III.2.15 Lessons for change agents (masters of ceremonies)

While digital business transformations often experience technical difficulties, the people working within an organization present significant challenge. To transform the people, not just the company and technology, firms can manage the transformation as a rite of passage. This can be accomplished by creating ceremonial processes so that employees can go through to open their minds to new possibilities, then lock in new ways of working. There are specific, actionable ways the change agent can effectively design a rite of passage and serve as master of ceremonies who guides people through all three phases (separation, transition and integration) of the transformation. Figure 12 summarizes the key duties performed by the master of ceremonies during the three phrases of the rite of passage. It also provides actionable guidelines for shepherding employees from their status as part of the legacy organization to their new identity as members of the transformed organization.

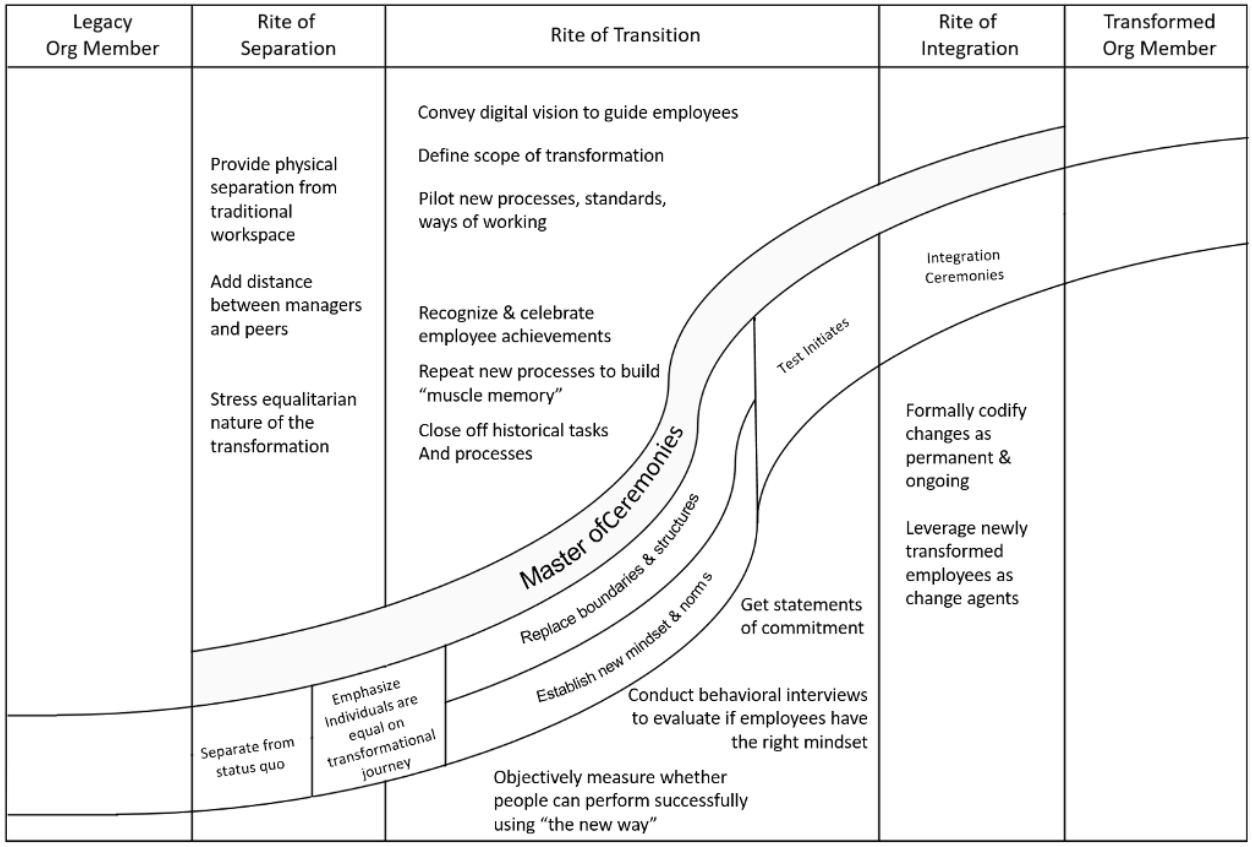

Figure 12. The Role of the Master of Ceremonies in Transforming Employees

III.2.16 Managing Rites of Separation

Those undergoing a rite of passage must be open to new boundaries and structures. Therefore, when possible, employees should be separated from their existing duties and the existing organizational hierarchy. When possible, new reporting structures should be introduced.

To achieve the separation necessary to begin a transformational journey, a master of ceremonies can do the following:

- *Provide physical separation from traditional workspace. Move employees to a new physical location, which is the most powerful separation.*

  ASK Consulting closed its offices and sent all employees home to work, unambiguously separating them from the traditional workspace.
- *Add distance between managers and peers, at least for a temporary basis to emphasize a separation from the norm.*

ASK's transformation involved a permanent physical separation, but for other firms a temporary change may accomplish the necessary separation.

Stress the egalitarian nature of the transformation. Ideally, in theory the organization hierarchy can be flattened temporarily. In practice, the master of ceremonies can push an egalitarian mindset by stressing that everyone is equal because they are all newbies in the transformation process.

ASK only changed a few reporting relationships, but CEO Karani stressed to all employees that they were all equally novice in navigating the pandemic and the transformation the company was undertaking. This reduced the perceived power distances within the hierarchy.

III.2.17 Managing Rites of Transition

During the rites of transition, the most meaningful changes occur. These changes must be led.[13] During this phase, the master of ceremonies shows others the way through the transformation. This begins with relaying a compelling digital transformation vision. The vision must also include the "why" the transformation is needed. The better the vision, the clearer the

[13] An analysis of firms undergoing significant digital initiatives finds that firms with strong, top-down digital leadership are 26% more profitable than the industry average while firms with major digital initiatives but without strong top-down leadership are 11% less profitable than industry average, for a 37% profit differential enjoyed by firms with top-down digital leadership. See Westerman G, Bonnet D, McAfee A. *Leading Digital: Turning Technology into Business Transformation*: Harvard Business Press; 2014. While innovation and implementation of digital initiatives can rely on employees at all levels of an organization, top-down leadership is required to create coherent strategy, overcome competing priorities, coordinate internal and external efforts, and align what otherwise would be conflicting goals. See Firk, S., Hanelt, A., Oehmichen, J., & Wolff, M. (2021). Chief digital officers: An analysis of the presence of a centralized digital transformation role. *Journal of Management Studies*, 58(7), 1800-1831. See also Budde, L.; Benninghaus, C.; Hänggi, R.; Friedli, T. Managerial Practices for the Digital Transformation of Manufacturers. *Digital 2022*, 2(4): 463-483.

roadmap it provides for people to follow. In the case of ASK Consulting, this vision was one of survival by working at digital scale and speed with unmatched per-person productivity.

During the rite of transition, employees replace their mindset about what is possible and create new norms and structures. These can occur at the same time and can be mutually reinforcing. For example, a change in mindset can make new structures possible, while at the same time the new structures represent new ways of working which will shape mindsets and ideas about what is possible. Social psychology tells us that people adapt their values and norms to fit their behavior rather than the other way around.[14] Therefore, requiring employees to perform new roles using new processes and policies will actually make them more willing to embrace their new roles and accept the new organizational structures."

During the rite of transition, the master of ceremonies can introduce changes to boundaries and structures through the following techniques:

- *Convey a digital vision to guide employees toward a new horizon for what the company can do and what it can accomplish.*

  CEO Manish Karani's vision for ASK was to become a company that operates at digital scale and speed with unmatched per-person productivity.
- *Define the scope of the transformation. Share expectations and opportunities with employees.*

  Karani defined an extensive project scope, one that affected where and how everyone at the company would perform their jobs. The transformation would involve wide-

[14] Social psychology research into attitude change and behavior modification finds that rather than changing behavior to match one's beliefs and attitudes, most people adapt their attitudes about specific actions to conform with their behavior. As such, one way to change someone's attitude is to first change their behavior because attitude changes usually follow behavioral change. For more information, see Triandis HC. The many dimensions of culture. *Academy of Management Executive.* 2004;18(1):88-93. and Triandis HC. Values, attitudes, and interpersonal behavior, 1979. Paper presented at: Nebraska Symposium on Motivation, 1980.

scale digitalization and eliminate many repetitive tasks and replace manual and paper-based processes through artificial intelligence and process automation. Employees would make decisions based on data rather than their intuition. Their jobs no longer would involve "busy work" but would focus exclusively on their high-value, result-bringing activities.

- *Pilot new processes, standards and ways of working. This will introduce the new structures.*

  Karani could not conduct traditional pilot tests because the pandemic was the driving force in ASK's transformation. Instead, he had to introduce new processes, standards and ways of working as soon as they were developed. The consequence was the rapid and complete replacement of the old structures with new ones.

Imparting a new mindset and establishing new norms within a rite of passage takes time. Instilling the right institutional mindset and cultural norms are critical to a successful digital transformation. There are several ways the master of ceremonies can foster new norms and mindsets.

- *Recognize and celebrate employee achievements. The master of ceremonies will build a winning team mentality by personally celebrating others' achievements.*

  As master of ceremonies, Karani highlighted individual and team accomplishments in company-wide announcements, which was a departure from his traditional CEO role, in which he would assign such tasks to team leads and managers.

- *Repeat new processes to build "muscle memory" for the new ways of doing business. Practice and repetition of new work practices is essential to establishing new norms.*

  All of ASK's employees followed new business processes and used new technology upon their introduction. This helped them quickly master them and build muscle memory.

- *Close off historical tasks and processes as no longer acceptable ways of doing business.*

  At ASK, workflows were integrated into the new technology. Most of the manual HR and recruiting processes were no longer accessible to employees. The pandemic halted to ability for in-person client sales visits, requiring the adoption of the new business development methods by the business development team.

Rites of transition require some form of trial to separate those who can (and do) transform from those who cannot. Without some form of struggle or trial, rites of passage will not result in people who see themselves as different or transformed, and firms will not filter out those who are ill suited to be part of the transformed organization. Like most organizational changes, digital transformation initiatives can be stressful for employees. During the transitional stage, people may quit and pursue other employment or they may leave the transformational initiative to return to previous duties at a company's legacy operations. A test or trial must demarcate those who pass from those who do not. This test or challenge provides an important ceremonial function. It also serves as a final filter to separate those who have transformed with the business and those who have not. The test can be ceremonial, or it can be a more formal test, such as Karani's third test, which measured whether employees were delivering adequate performance results given the new ways of doing business.

The following tests can effectively determine whether individuals participating in the digital business transformation have themselves transformed appropriately for the new organization:

- *Get statements of commitment at different stages of the transformational process. This enables employees to self-select themselves out of the transformation.*

  Karani asked if they were willing to accept new working conditions and adopt the new business processes. At ASK, opting out meant leaving the company for other employment, but for many companies it could represent the choice to stay with a legacy business unit.

- *Conduct behavioral interviews to evaluate if employees have the right mindset. Have they embraced the new norms?*

  ASK hired new employees during the transition phase of their transformation and backfilled many vacant positions after completing the transformation. They asked new hires behavioral interview questions to determine whether they had a suitable

mindset to be part of the transformed organization, which included a willingness to serve the team and an open-mindedness to change. Relevant interview questions are a) give me an example of when your team was facing failure and what you did to turn it into a success, and b) talk about a time when you had to change the way you did something in order to succeed.

- *Objectively measure whether people can perform successfully using the "new way."*
  Use empirical performance data, as ASK did, or require a field test demonstration to evaluate whether a person has transformed to the degree necessary to perform at an appropriate level in the new organization.

III.2.18 Managing Rites of Integration

A rite of passage requires those who complete the transition to integrate into a new community, in which they have a new identity. Successful reintegration can be through ceremonies such as the following:

- *Formally codifying changes such as office closures or new processes as permanent and ongoing. This signals that changes are not temporary and represent the new normal.*
  Karani announced that the Indian offices would remain closed permanently, signaling that the work from home model and related processes were permanent.
- *Provide those who completed the transformation the opportunity to train new hires. Leverage newly transformed employees as change agents for new hires and/or others beginning the journey. Give them opportunities to tell their story.*
  ASK hired new employees during and after its transformation. Current employees trained these new hires which presented the new norms, structures and processes as standard operating procedures to new hires while underpinning their importance to the current employees.

III.2.19 Concluding Comments

People can pose as great a challenge to digital business transformations as technology. Companies can successfully manage the transformation as a rite of passage in which not just company and technology are refashioned, but in which the people within the company are also

transformed. A change agent can follow relatively simple guidelines and act as a master of ceremonies who leads people through rites of separation, then rites of transition, and finally brings them into the transformed organization through rites of integration.

III.3 Appendices

Appendix A: Research Method

This study takes an exploratory, qualitative approach to collecting data. A qualitative approach allows us to uncover rich details about people's in situ experiences based on their own words. ASK Consulting was selected for this research because is it a medium size enterprise that faced great upheaval during the COVID-19 pandemic. It had sufficient resources to changes its business, but it did not have sufficient resources to do nothing and wait out the pandemic until things returned to normal. It also provides a multi-geography study, so findings are less likely to be idiosyncratic to one specific geography or culture. One researcher was acquainted with several ASK executives, facilitating access to personnel and to company data.

We interviewed employees at all rank levels within the organization, including those in American-based headquarters and the back-office operations in India. Videoconference interviews lasted approximately one hour and were recorded and transcribed. We used simultaneous data collection and analysis, in which our analysis of new information would shape our future data collection and help focus our interpretation of the data.[15] Our findings were "member checked" by key participants to confirm that the details in this article accurately portray the case and that the conclusions match the actual experience of ASK Consulting.[16]

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[15] Simultaneous data collection and analysis helps expand researchers' knowledge and acquire deeper insights into the topic under investigation. More information can be found in Corbin J, Strauss A. *Basics of Qualitative Research*. Thousand Oaks: Sage Publications, Inc.; 2008.

[16] Member checking is sharing research reports with interviewees to get their feedback on the interpretation of the findings. It is a way to check the validity of the research findings. This research technique is detailed in Miles MB, Huberman AM, Saldaña J. *Qualitative data analysis: A methods sourcebook*: Sage publications; 2018.

The choice of the anthropologic theories of rites of passage was not selected a priori. The interview guide was designed to study what makes organizations resilient. We employed a hermeneutic approach to analyzing the data, allowing us to reach a consistent and coherent understanding of the research context and problem under investigation.[17] During this process, the suitability of rites of passage emerged as a useful lens for understanding how ASK's digital transformation was managed. The theory is relatively novel to information systems research, but has been used to study crowdwork,[18] corporate social responsibility in IT outsourcing,[19] and ERP implementation.[20] To our knowledge this is the first application to managing digital business transformations.

We used a semi-structured interview guide consisting of the following questions during hour-long interviews:

1. Tell me about how your job has changed during COVID - this could be about the circumstances in which you work, the way you do your job, or the way things changed at the company.

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[17] Hermeneutics is a methodology for interpreting words within the context in which they are spoken or recorded. Details about the methodology and how to apply it in research such as this can be found in Charmaz K. *Constructing grounded theory*: SAGE publications UK; 2006. and in Myers MD. Dialectical Hermeneutics: A Theoretical Framework for the Implementation of Information Systems. *Information Systems Journal.* Jan 1995;5(1):51-70.

[18] alternatives to Western precarity: beyond epistemological terra nullius. European Journal of Information Systems, 31(1), 128-144.

[19] Nicholson, B., Babin, R., & Briggs, S. (2017). Exploring the effects of liminality on corporate social responsibility in inter-firm outsourcing relationships. Journal of Information Technology, 32(1), 47-61.

[20] Wagner, E. L., Newell, S., & Kay, W. (2012). Enterprise systems projects: the role of liminal space in enterprise systems implementation. Journal of Information Technology, 27(4), 259-269.

2. What new obstacles did you face during the COVID era?

And how did you handle them – if you handled them?

3. What do you think made you successful in your job during this time?

4. What was the mental and emotional experience like for you?

5. What do you think are the differences between the people who are still with the company and those who are not? Specifically, was there a difference in what one group did versus the other? Did the groups take different actions or different approaches?

6. In what ways did your coworkers help you during the pandemic…

…and in what ways did you help them?

7. What do you think are the two most important factors that have made your company resilient during the pandemic?

8. What characteristic about yourself do you think has made you resilient during the pandemic?

9. Please tell me about what made you able to accomplish what you were able to accomplish.

10.A. For employees: What is motivating you to stay in this dynamic environment?

10.B. For executives/managers: How did performance management policies keep recruiters motivated?

11. Is there anything you'd like to tell us that we didn't ask about

Interviews were conducted in 2022. After receiving editorial feedback, we reinterviewed one participant and interviewed an additional participant in early 2023. These additional interviews address specific information requested by the senior editor.

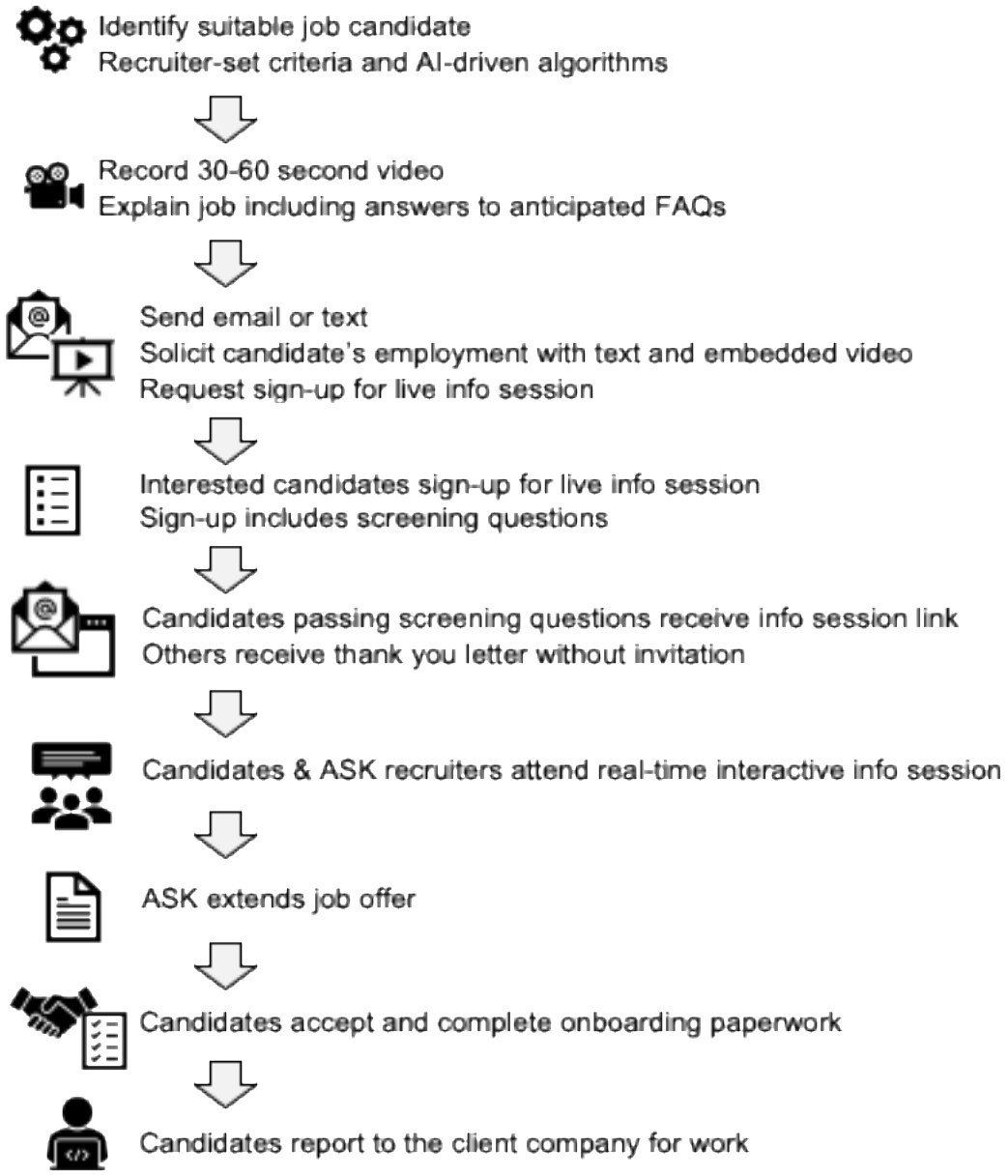
The following is a summary of our interviewees:

Table 4. Summary of Interview Participants

Date	Participant Description	Duration	Location
5/20/2022	HR Executive	1:05	USA
5/23/2022	CEO	1:04	USA
5/23/2022	C-Level Officer	0:56	USA
5/19/2022	Sr. Director	1:01	USA
5/20/2022	Account Manager	1:06	USA
6/1/2022	Sr. Recruiter	0:57	India
6/1/2022	Sr. Recruiter	0:38	India
6/1/2022	Sr. Recruiter	0:25	India
6/1/2022	Sr. Recruiter	0:53	India
6/1/2022	Account Manager	1:02	India
6/23/2022	Team Lead	0:56	India
6/24/2022	Lead	0:43	India
1/29/2023	HR Executive (Second Interview)	1:13	USA
1/29/2023	Operations Executive	1:13	India
	13 Interviewees	1:01 Average Interview Duration	

Appendix B: How Ask Recruits At Digital Scale Using Progressive Funneling

When ASK Consulting has multiple job openings within a client firm, they interview dozens, even hundreds of people in an online seminar, then make job offers after the session. Below is a description of the progressive funneling process, with potential job candidates filtered out after each step.



Authorship Note: This chapter was co-authored with Nkosi Leary, Umang Thakkar, Gregory Gimpel. It is a forthcoming article in MIS Quarterly Executive

IV CHAPTER FOUR: CONCLUSION

Remote work has transformed from an employee perk at selected companies to a standard operating procedure for most organizations. While many organizations have expressed their intention to bring remote employees back to a physical office, many such initiatives are based on hybrid work settings, in which employees work remotely part of the time and work out of the company's office the remainder of the time. For corporate executives, embracing remote and hybrid work is crucial for remaining a competitive force in today's dynamic business landscape. At the same time, managing employees and leading organizations from the perspective of remote teams necessitates a nuanced approach, contrasting considerably what is needed in traditional in-office settings (Arunprasad et al., 2022). This dissertation investigates this phenomenon from two perspectives: from the level of managers as they direct the day-to-day responsibilities of their employees, and from the level of C-suite executives who are driving significant organizational change, which recently included the shift to remote work, and increasingly is focusing on return-to-work initiatives.

While leading and managing are often used interchangeably in conversation, they are distinctly different concepts. As explained by Kotter (2001), managers plan, organize, hire personnel, provide control and solve line-level problems. Leaders, on the other hand, set organizational direction, align various people and stakeholders, establish culture, and provide motivation. Peter Drucker (1988) argues that "the fundamental task of management remains the same: to make people capable of joint performance by giving them common goals, common values, the right structure, and the ongoing training and development they need to perform, and to respond to change." Whereas managers are administrators who set budgets and monitor progress, leaders are change agents who get people and organizations to change (Maccoby, 2000; Toor and Ofori, 2008).

To understand how to navigate a business environment that includes a remote and hybrid workforce, one needs to investigate both what managers need to do to elicit high performance from their remote and hybrid employees as well as how corporate executives can effectively lead their employees within the organization. To address these challenges, this research undertakes two research projects.

One research project seeks to answer the research question: What are best practices for managers to elicit high performance from their remote and hybrid employees? To answer this question, interview data are collected from 20 managers who supervise remote and/or hybrid teams. The other research project pursues answers to the question: What can the shift to remote work tell us about how to lead companies through organizational change? This study performs a deep dive into the case study of a staffing firm that closed all its officed at the beginning of the global COVID-19 pandemic, which then sent its employees to work remotely. The company has since permanently closed the physical offices related to its operations, except for a small corporate office for senior executives.

The lessons learned from the two studies are that are material differences in the approaches managers and leaders should take vis-à-vis their employees. Because management and leadership are qualitatively different organizational needs, by addressing both, this dissertation provides a more inclusive understanding of the remote and/or hybrid working phenomenon.

This study finds that managers must individualize their approach to supervising each of their reports. This is an individual-by-individual approach that embraces situational leadership. On the other hand, leaders must create a compelling vision and architect a process for leading employees and act as a role model – a master of ceremonies – to show employees the way.

IV.1 Managing Remote and/or Hybrid Employees

Managers need to accommodate the individual needs of their employees based on their skills and commitment and should apply the tenets of situational leadership (Blanchard, 1987). This involves understanding each team member's strengths, weaknesses, and personal preferences to foster a productive and supportive work environment. Additionally, managers must adapt their approach to the different contexts displayed by their team. Moreover, remote management often necessitates a greater emphasis on autonomy and self-motivation among team members, requiring managers to shift their focus from direct supervision to providing guidance and support from a distance. At the same time, when entering a new managerial context, such as switching from directing in-person groups to remote teams, managers who are novice within the new context must take extra steps to effectively manage their employees.

Activities that support managing remote and/or hybrid employees are conducted from a context of those managers who are experienced at applying situational leadership tenets or inexperienced or novice managers who are new to managing remote employees. Figure 13 below displays a matrix display corresponding with manager maturity against the employee skills and commitment tenets. It lists the maturity of the employee on the vertical axis, along with the associated situational leadership (Hersey, 2014) approach appropriate for each maturity level. The horizontal axis represents the maturity of the manager, based on the level of experience with a given context. For this study, the manager's context was experience managing remote and/or hybrid employees. Normative guidelines are provided for managers, with common guidelines indicated by black font and additional guidelines for novice (i.e., not mature) managers indicated by blue font.

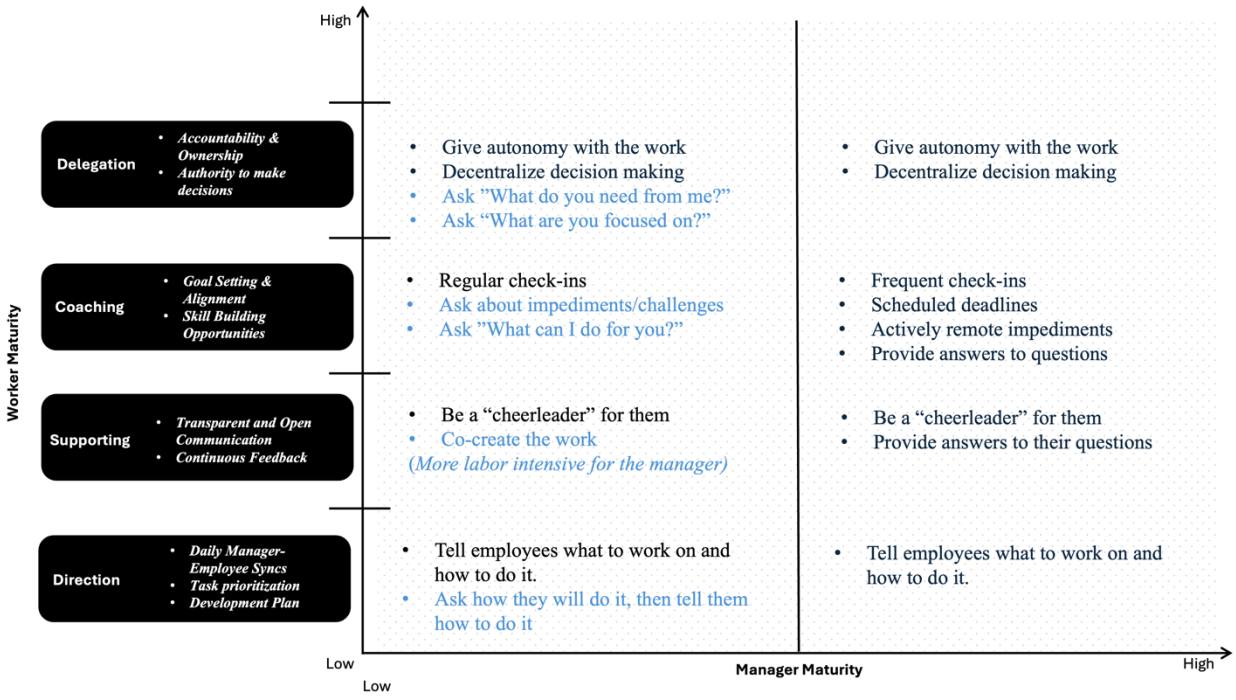


Figure 13. Activity Based Situational Leadership Capability Grid

IV.2 Leading Remote and/or Hybrid Workforces

Senior leaders set the direction for a company. At the same time, they must make sure that employees can embrace the changes necessary for the company to reach its new destination. However, merely charting a course for the organization is not enough; leaders must also ensure that employees can embrace the changes necessary for the company to reach its new destination. This entails a thorough understanding of the organizational community and culture, individual capabilities, as well as potential barriers to change within the workforce. To do this, they must identify which people are able to make the needed changes, and architect a structured process to change not only the company, but also helps its people change as well. During such changes, the leader must act as a guide, shepherding his or her employees through a carefully orchestrated journey. To lead people such that they internalize the changes that are required of them, senior leaders can utilize the following time-tested process.

During times of change, a senior executive charged with implementing major changes should become an observable presence in the work lives of those they are leading. They must create a context in which they separate their employees from the status quo. Part of this separation requires that employees share a sense of equality, whether they are made equal, or simply recognize that they are equal in experiencing the same change together. The leader must then help employees transition from one working identity to another. This requires a carefully crafted vision to guide employees toward a new horizon and to set expectations. Leaders need to replace existing boundaries and structures with new ones and foster new norms and mindsets.

They must also begin to close off historical processes and ways of working that do not fit the activities required in new roles. They must test employees to see who can work in a new environment and who cannot. Not everyone can adapt to new ways of working. Finally, leaders need to have ceremonies that represent that their employees have successfully made the necessary changes and can be part of the "new way" of doing business.

Figure 14. below visualizes the activities discussed for senior leaders to navigate employees into a changed organization. The text in the curve establishes the process's higher-level objectives, while the text in the columns provides specific guidelines for leaders to follow that are based on the data collected for this dissertation.

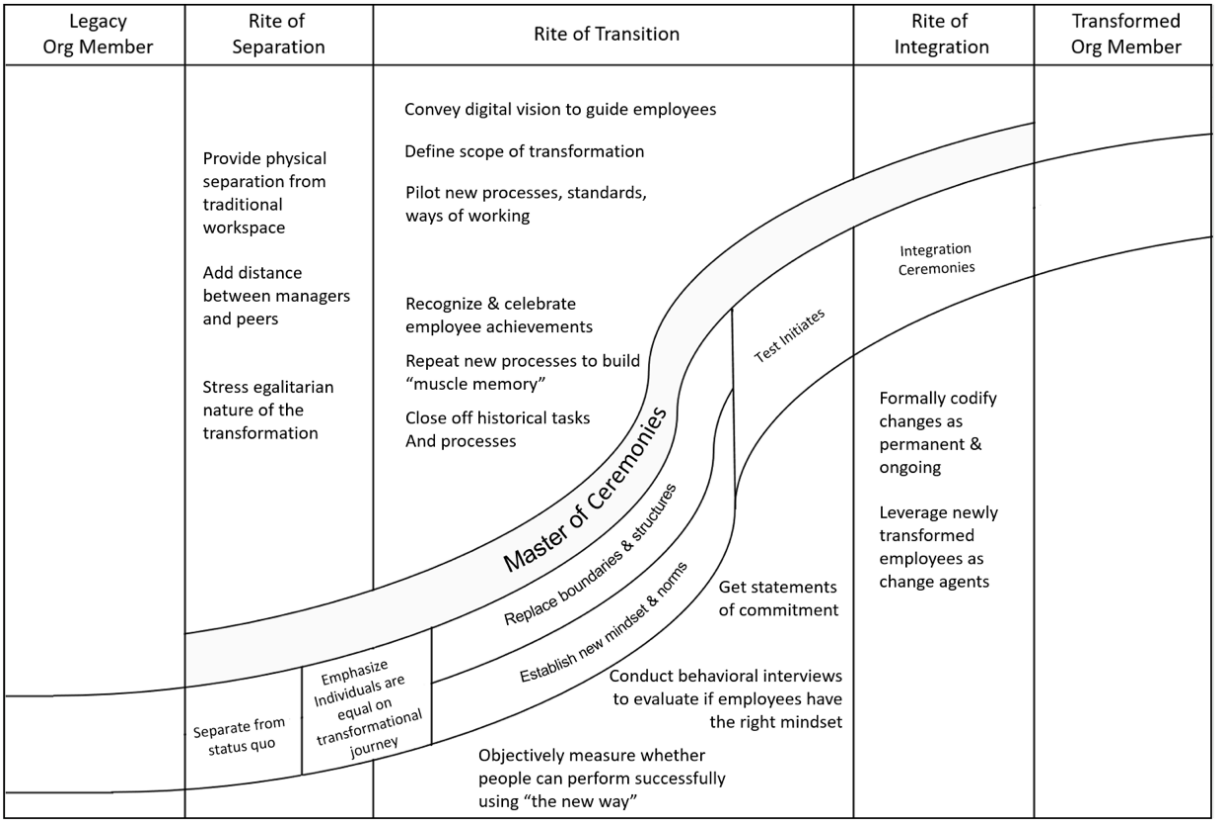


Figure 14. Senior Leader Activities Through a Change Journey

IV.3 Limitations & Future Research

It is important to recognize several limitations inherent in this research. Both studies are set in the Covid-era context, which is a once in a century phenomenon, that may decrease the generalizability of some of the findings. Applying the findings of this research study into a context that extends beyond remote work and Covid-19 could identify other applications to apply the extension of situational leadership. Additionally, the generalizability of the theoretical extensions may be limited to "knowledge workers" or "knowledge work context" within a in office or professional type setting. While this manager focused study included study participants from a variety of industries, the leadership focused study is based on one case study of one company. The case study featured in the leadership study is a company that exclusively employs knowledge workers. Therefore, the applicability to other types of managers, such as those

supervising skilled trade journeyman or a more manual task-based workforce (e.g. factory or warehouse hourly employees) may need further investigating. Future research can also use Van Gennep's (1960) theory of liminality to study other case studies on organizational change beyond the remote work context. A final future research opportunity can adopt a longitudinal study across a broader range of organizations exploring the long-term effects of extended situational leadership theory. By focusing these limitations, future research can contribute to a more focused understanding of the intricacies surrounding both leading and managing and its implications for organizational effectiveness.

V NEXT STEPS

As I embark on the next phase of my research journey, I am poised to make strides in the field of organizational management and leadership. Building upon the foundations that have been laid throughout my doctoral journey, I envision conducting research that pushes the boundaries of our understanding of leadership in complex and rapidly evolving environments. Taking the initial research that I have established during this study, I aim to continue exploring the dynamics of remote and hybrid work looking at other aspects including emerging trends such as generative ai, augmented reality, and the transition to a more digital ecosystem to anticipate future leadership and management needs and develop innovation solutions. My goal is also to publish my findings into a practical journal, expanding the accessibility to managers and leaders that are in search of solutions to support managing a remote workforce. I am driven by my passion to create positive change in both my organization and organizational worldwide. I would like my research findings to not only contribute to academic discourse, but also inform practical strategies for leaders and managers across diverse settings.

As I begin to transition into my post-doctoral career, I am committed to translating my research insights into actionable recommendations and interventions that empower individuals and organizations to thrive in the face of uncertainty and complexity. Drawing upon my learnings, I also look to incorporate a new way of exploring the dynamic and unique challenges in my current role at Nike, to develop innovative leadership development programs, design evidence-based management tools and resources, and cultivate a culture that thrives in a new way of working. Finally, I aim to inspire and empower others to embrace change, navigate ambiguity, and unlock their full potential and leaders and change agents in the global landscape.

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Publications
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Nike, Inc. DEI Leadership Acceleration Academy to develop foundational competencies and skills that enable leaders to solve dilemmas at the intersection of race and gender; use practical approaches gained to make equity-conscious leadership decisions for the well-being of all employees; and employ DE&I literacy to make the workplace more equitable, diverse, and inclusive.

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Delta Air Lines HBDI Practitioner Training

Myers Briggs Type Indicator (MBTI) Practitioner
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Kennesaw State University- Kennesaw, GA
Course: Agile Fundamentals
Asynchronous course developed in response to a gap within the CCPE training curriculum to support working professionals with upskilling in Agile. A 9-week course covering the fundamentals of Agile. Course was developed and facilitated via a hybrid teaching model.

Pending Peer-Reviewed Publications

Pending Publication
Leary, N., Perkins, L., Thakkar, U. and Gimpel, G. (2023), " Rite of Passage: A New Approach to Managing Digital Business Transformation" MIS Quarterly Executive

Practitioner Experience

Nike, Inc. -Beaverton, OR **2019-present**
Head of Global Talent & Transformation Enablement Office
Senior leader leading Nike's first Technology Talent & Transformation Office focused on unlocking people, processes, and technologies to maximize the digital customer experiences. Led the holistic strategy focused on targeting upskilling and reskilling of Nike's employees across a technology competency and skill focused initiative.
Key Accomplishments

- Led the overall activation of a centralized Program Management capability across multiple functions such as Nike Consumer & Marketplace, Global Supply Chain, Global Technology, and Global Marketing.

- Orchestrated the first end to end global operating model throughout Nike, Inc driving efficiencies across both Global & Geos, role alignment, talent upskilling & reskilling, as well as organizational effectiveness and change. Outcome was an operating construct called "integrated Ways of Working (iWoW)" across all of Nike technology functions leading to a more efficient distributed workforce.
- Developed teaming framework called "One Team" focused on developing high performing, cross-functional, distributed teams across Technology organization.
- Built and led Global Technology's first Learning Organization focused on driving upskilling strategies and needs for a global workforce disbursed throughout globally based offices. Developed a talent transformation strategy across ~20 job families.

Delta Air Lines- Atlanta, GA **2017-2019**

Head of Global Agility Transformation Strategy & Operations

Drove the global strategic positioning of the One Delta strategy, enabling simplified joint venture partnerships, lean and systematic end-to-end processes, as well as a Single View of the Customer strategy driving consumer personalization.

Key Accomplishments

- Responsible for driving a portfolio budget of $25MM across geographically disbursed teams, resources, and partners.
- Developed a long-term product strategy and management of global product portfolio, building a competitive portfolio focused on capitalizing on Delta's premier network and operational reliability.
- Managed and led the Agile transformation efforts for Delta's employees. Given accountability by the CTO to drive adoption and alignment to key targeted outcomes.

Leidos, Inc. ***a division of SAIC*** **2012-2017**

Head of Technology Operations & Global Strategy

Provided essential expertise to solve business challenges in a complex public health environment, enabling business leaders to achieve their goals. Addressing key priority engagements supporting informatics & application development implementations that aid the organization to execute on its strategy and achieve its objectives.

Key Accomplishments

- Served as Program Director for a CDC account managing the delivery of multiple complex and large-scale solution development initiatives across multiple cost centers. Facilitates and leads a multi-disciplinary innovative program consisting of medium and large-scale strategic projects expanding multiple teams and areas with more than 15 direct reporting personnel in addition to contractor oversight.
- Worked with Sr. Leadership to define Innovative solutions leveraging best practices for data collection, management, security, and reporting working to achieve effective solutions for users.
- Interacted with Sr. Executives to understand project requirements, timelines, resource availability, and existing assets to leverage. Collaborate with clients to define new projects and strategic initiatives.
- Transitioned the development organization to DevOps by implementation test, build, and transport automation from Dev through Staging leveraging CI/CD. Leveraged TFS, Telerik Test Studio along with Jira throughout implementation facilitating strategic alignment to SAFe practices.

- Managed multiple global applications ensuring disaster recovery protocols are implemented along with business continuity. Managing a team that delivers and supports system solutions that support CDC global operations on a 24x7x365 basis by establishing an on-call schedule.

Other Professional Experience

Global Program Management Office	MedAssets	2011-2012
Global Portfolio Manager	Global Payments	2009-2011
Principal Consultant of Strategic Initiatives	SRA International	2006-2009
Sr. Application Lead, Finance Technology	Norfolk Southern Corp.	1999-2006