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Pepperdine University
Graduate School of Education and Psychology

A PHENOMENOLOGICAL STUDY OF THE LIVED EXPERIENCES OF EMPLOYEES
WHO WORK VIRTUALLY AND THEIR PERCEPTIONS OF LEADERSHIP BEHAVIORS
THAT CREATE A SUCCESSFUL VIRTUAL ORGANIZATION

A dissertation submitted in partial satisfaction
of the requirements for the degree of
Doctor of Education in Organizational Leadership

by

Ann Gladys

May, 2014

June Schmieder-Ramirez – Dissertation Chairperson

LEADERSHIP BEHAVIORS FOR A SUCCESSFUL VIRTUAL WORKFORCE

This dissertation, written by

Ann Gladys

Under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

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DEDICATION

I dedicate this dissertation to my mother, Louise Burksaze. Though she passed away almost six years ago, she has been with me in spirit throughout this doctoral program. My mom was always a proponent of education and from the time I was a young child she encouraged and helped me to learn and grow. Though our family was extraordinarily poor and we scavenged for empty soda bottles to trade in for quarts of milk, she scrimped enough to provide me with a quality education. Giving up much for herself, my mom gave endlessly to her children and loved us from the depths of her soul to the encouraging words from her mouth. I am forever grateful for all she taught and gave me in terms of love of God, tenacity, curiosity, and the desire to learn. Whenever I needed assistance beyond what she could give, I could always count on her to say a prayer for me – some part of me knew she had a direct line to God! May she be forever happy in heaven and continue to watch over me.

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ABSTRACT

Can virtual work simply be described as doing the same work in a different venue? Is the virtual workforce merely a construct of technology? Where does the virtual worker fit into the paradigm of telework? And how does leadership of the virtual workforce need to adapt to accomplishing work in a virtual environment? The fact is that the culture of virtual work has become increasingly rooted over the years. Most recently, economic struggles and the advanced technology associated with a global economy have set the stage for a more connected workforce in more disconnected venues. Virtual work offers distinct positives for organizations as well as employees. Employers save financially by reducing the costs associated with physical footprints, and employees save commute time as well as commute costs. While virtual organizations may appear to be a panacea for the economic and time complexities that beset employees and corporations, the success of the virtual workforce presents a viable challenge to leaders. Instead of leading less in a relatively anonymous environment, leaders need to alter their leadership behaviors to be able to lead more in the virtual workspace. Through a phenomenological study, the research herein was designed to explore and offer insights into leadership behaviors, from the vantage point of virtual workers, that positively or negatively influence the success of virtual organizations. The significance of this topic rests in the fact that leadership behaviors play a central role in defining the success of a virtual organization (Society for Human Resource Management, 2010). Hence, the purpose of this study is to explore the leadership behaviors that positively and negatively impact the success of a virtual organization. Using an analysis of research that defines the successful virtual organization as one that maintains metrics that are equal to or exceed in-office environments in terms of employee productivity, retention,

attendance, development, and promotions, this study examines leadership behaviors from the vantage point of virtual workers.

Keywords: virtual workforce, telework, leadership traits, leadership behaviors, productivity, retention, attendance, training, employee promotions

Chapter 1: Introduction to the Study

“Management is about arranging and telling. Leadership is about nurturing and enhancing.”

Tom Peters

Introduction

Can virtual work simply be described as doing the same work in a different venue?

Perhaps one of the best descriptions of virtual work comes from Friedman’s (2005) notion of a flat world, “Engines talking to computers, talking to people, talking back to the engines, followed by people talking to people – all done from anywhere to anywhere” (p. 172). However, is the virtual workforce merely a construct of technology? While technology is the enabler of the virtual workforce, there is far more to creating a successful virtual organization than installing and configuring technology.

As leadership plays a dynamic role in any organization, it is reasonable to consider the leadership behaviors that best serve the virtual organization. Are there leadership behaviors that specifically contribute to a successful virtual organization? And how do leaders of virtual organizations need to adapt to a decidedly unique and documented variation of accomplishing work? These questions naturally lead to the following consideration; where do the needs of the virtual worker fit into the paradigm of leadership behaviors in the telework environment? Perhaps, one might ask, do those who work in virtual organizations hold the keys as to which leadership behaviors contribute most to this type of organization; and are there leadership behaviors that specifically contribute to a successful virtual organization?

The theoretical framework for the research contained herein centers on Transformational Leadership introduced by Burns in 1978 and expanded on by Bass in 1985 with a core focus on interpersonal elements and traits such as individualized consideration, intellectual stimulation,

inspirational motivation, and idealized influence (Bass & Riggio, 2007; Jogulu & Wood, 2007).

The purpose of this research study is to qualitatively examine the perceptions of virtual employees concerning leadership behaviors that positively and negatively affect their performance in a virtual work environment. Using an analysis of research that defines the successful virtual organization as one that maintains metrics that are equal to or exceed in-office environments, this study examines leadership behaviors from the vantage point of virtual workers, which add to or detract from the success of the virtual organization in the context of;

1. employee productivity (Robertson & Vink, 2012),
2. retention (Cole, 2012),
3. attendance (Sharit, Czaja, Hernandez, & Nair, 2009),
4. professional development (Malhotra, Majchrzak, & Rosen, 2007),
5. and job promotions (Mulki, Nardhi, Laddek, & Nanavaty-Dahl, 2009).

Perhaps the answers to questions surrounding leadership of virtual organizations reside in the nature of working virtually; where both leaders and followers consistently attempt to overcome the time and distance challenges imposed by the virtual environment (Mulki et al., 2009).

For leaders in virtual organizations, the challenges reside in trying to interface with employees from afar where anonymity and isolation may exist. As it relates to social intelligence, leaders in general must relate to their employees in a socially intelligent manner that provides effectiveness about and in relationships and through empathy (Goleman, 2006). In addition, leaders must also overcome doubts, and trust that their employees are really working and not attending to duties and obligations on the home front (Fisher & Fisher, 2001; Peters, den Dulk, & Ruijter, 2010). Hence, leadership must address these challenges and develop and use

different leadership behaviors to manage at a distance. For example, consistent one-on-one communication that exceeds what would normally be associated with in-office communication with virtual workers may serve as a tool for creating, enhancing, and maintaining a level of trust. Such communication would serve to mitigate doubts about the virtual employee and send a message to virtual employees that speaks to a sense of commitment rather than control (Fisher & Fisher, 2001). Additionally, well-articulated job metrics can serve to establish appropriate expectations on the part of the leader as well as the virtual worker (Fisher & Fisher, 2001).

The role of the leader in a virtual setting is further complicated by technology glitches which can breed frustration, personality conflicts among team players, cultural misinterpretations; all of which require creative ways to increase communication and enhance relationship building (Roy, 2012). Hence, it is fundamentally the responsibility of leadership to deal effectively with their challenges and the challenges of their virtual employees to ensure mutual success.

In as much as the telework environment challenges the leader of a virtual organization, it is equally challenging for the virtual employee. Despite the advantages offered by technology, employees must adjust to a new venue (Morello & Burton, 2006), a new way of interfacing with teammates (Zaccaro & Bader, 2003), and a new way of dealing with their leadership (Robertson & Vink, 2012). They must adapt their living environments to include workspaces that do not intrude on their personal lives (Maruyama & Tietze, 2012; Montero, 2004; Walker, 2010). Additionally, adaptation to a virtual work venue includes setting boundaries for family interruptions, maintaining focus, and setting limits on personal breaks (Montero, 2004; Walker, 2010). Interacting with former and current office teammates requires adaptation as well, to ensure more effective and frequent communications (Zaccaro & Bader, 2003). Not the least of

the adaptations is that of interface with leadership (Whittle & Mueller, 2009). The adage *out of sight, out of mind* is relevant since leadership may view virtual employees merely as conduits to deliverables. In such a situation, the employee may be objectified and viewed in what Goleman (2006) describes as a process of thingification. Unfortunately, if the employee is objectified, communication and interface becomes limited between employee and manager, and as a consequence the efforts of the employee can go *virtually* unnoticed (Walker, 2010).

In sum and core to the issue of transition to a virtual organization is that both leaders and virtual workers must contend with change from a more highly structured hierarchy to an organization that is flatter, more networked, and more technically sophisticated; one requiring extensive team cooperation across the various domains of an organization (Brown, Royer, Waterhouse, & Ridge, 2005). In fact, according to Avolio & Kahui (2003), "Leadership in virtual teams will need to expend more effort on relational development than traditional teams" (p. 334). Leadership styles that are directive or transactional can work well for structured, short-term projects (Avolio & Kahui, 2003). However, in virtual settings where there are more complex and unstructured problems, transformational and participatory leadership styles are more effective (Avolio & Kahui, 2003). What then, from the perspective of the virtual employee, are the leadership behaviors that provide for a successful virtual organization and which are those that result in organizational challenges? The purpose of this study is to examine the perceptions of virtual employees concerning leadership behaviors that positively and negatively affect a virtual workforce.

Background

There are a number of common terms in today's vernacular that can be used to reference a non-traditional (i.e. an out-of-office) workforce. These include virtual workforce, virtual

teams, telework organizations, and mobile workforce (Gibson, Blackwell, Dominicus, & Denerath, 2002). In addition, some of the names given to individual teleworkers include digital nomads, web-workers, portable professionals, location-independent professionals, iworkers, eworkers, mobile professionals, remote workers, and technomads (Pinola, 2012).

Each of the above terms speaks to an individual or group of individuals who support an organization but are not physically present in a single traditional office location. Years ago, with the exception of a small number of contractor support staff, and in the days before mass outsourcing, the work environment was easily defined in terms of a group of people who worked in the same place within the same culture, during the same hours, performing the same face-to-face job function (Fjermestad, 2009). Bookkeepers worked in offices with other bookkeepers from 9 to 5; typists worked in a typing pool with other typists, etc. The work culture and workforce was well defined and leaders knew exactly where their employees were and what their employees were doing at any given time (breaks included). Today, the work environment is blended since it includes both in-office and virtual work settings. This situation begs the question; which leadership behaviors best serve the virtual workforce?

Overall, the work landscape has evolved into an anywhere, anytime environment, complete with a vernacular of its own. And while the virtual organization offers the benefits of flexible time and space, it also brings challenges to leadership that require a reassessment of current behaviors and transition to new behaviors to support employees who are no longer within physical reach.

Statement of the Problem

All too often virtual leaders do not navigate very well through the challenges associated with guiding a virtual workforce, and find their virtual teams do not achieve predetermined

metrics and thus are deemed failures (Morris, 2008). If, in fact, virtual leaders frequently fail to lead their teams to success, it may very be that the perceptions of virtual employees about their leaders hold the key as to which leadership behaviors positively or negatively impact the success of the virtual workforce.

The problem this study addresses is reducing the incidence of failure within virtual organizations by examining the perceptions of virtual employees related to leadership behaviors that positively or negatively affect their work performance in a virtual setting. The intent of the research is that the views of virtual workers would shed light on which leadership behaviors help or hinder the performance of the virtual workforce. To this end, the focus of this research is on the perceptions of virtual workers about the behaviors of their leaders that positively or negatively affect the success of their organizations. The perceptions of the research participants in this study were considered in the context of the five factors that define a successful virtual organization i.e. productivity, retention, attendance, professional development, and opportunity for promotion.

Purpose of the Study

The purpose of this study is to examine the perceptions of virtual workers concerning which leadership behaviors positively or negatively impact the five factors that define a successful virtual organization (productivity, retention, attendance, professional development, and opportunity for promotion).

Recent Statistics

Statistics concerning virtual work are noteworthy from a number of vantage points. First, the presence of the virtual workforce has grown substantially over the last five years (Brotherton, 2012) creating precedents for future growth in the use of the virtual workforce paradigm.

Second, employees have become enamored with the virtual office venue so much so that many would choose a virtual work setting over a pay raise (Snyder, 2012). And third, employers establishing a virtual organization can experience a substantial decrease in operational costs (Chronos, 2011) and a significant increase in employee productivity (Yu, 2008).

In regards to the growth of the virtual workforce, a study in 2011 revealed that alternative work arrangements that are virtual (telework, hoteling, work at home) are gaining momentum (Brotherton, 2012). Though a large number of managers were concerned about losing control and remained uncomfortable with workers who are out of sight, the number of virtual employees has continued to increase (Brotherton, 2012). Brotherton (2012) indicates it appears that onslaught of alternative work programs is actually being driven by empowered employees in a bottom up approach. In fact, according to a survey conducted in 2011 of 140 respondents by New Ways of Working (as cited in Brotherton, 2012), the percentage of workgroups engaging in alternative work settings has risen to 32%; this is up from 18% in 2009. In addition, the number of workers with assigned desks in companies has declined from 76% to 66% during the same timeframe (as cited in Brotherton, 2012). Most notably, the number of virtual workers is expected to grow to 1.3 billion within the next several years (Johns & Gratton, 2013).

The desire of employees to work virtually has driven companies to consider implementing virtual work within their organizations. In order to establish baselines for implementing the virtual workforce, companies first assess the number of employees who are eligible to work virtually (Walker, 2010). In general, eligibility is based on an employee's ability and willingness to work virtually (Walker, 2010). Statistics indicate that, of eligible government employees, there has been an increase in the percent of eligible workers who have transitioned to the virtual office from 10% in 2009 to 21% in 2011 (Tuuti, 2012). In fact, one of

the best implementers of virtual work in government is the Patent and Trademark Office where 82% of their eligible workers work virtually (Tuuti, 2012). Growth of the virtual workforce is expected to continue to grow in the Federal Government since goals for the virtual workforce have been set at 45% of eligible employees (Lipowicz, 2012).

Overall, across government and industry, implementation and use of the virtual workforce is expected to continue to increase by way of virtual interface that is becoming more commonplace (Roy, 2012). In fact, working virtually is deemed favorable among virtual workers where approximately 80% of employees tend to favor working virtually (Snyder, 2012) and more than 33% of Americans indicate they would opt for working virtually rather than receive an increase in pay (Snyder, 2012). From the employees' vantage, the positives include the time savings of no longer commuting to the office. Offstein and Morwick (2009) document that as much as eight work weeks per year is wasted in the average 40 minute commute. Employees also cite the financial savings in terms of transportation (Gibson et al., 2002; Maruyama & Tietze, 2012), as well as the ability to react quickly to emergencies on the home front (Maruyama & Tietze, 2012).

In addition to the favorable statistics for employees, employers have also fared well. In 2011, Chronos Consulting received surveys from 83 companies in the United States and Canada concerning the topic of virtual teams. These companies reported their primary reason for migrating to virtual teams was financially driven. In fact, the companies involved in the survey reported much as a 21% cost savings by moving to a virtual workforce model. Overall, as employers continued to migrate their employees to a virtual setting, many reported increases in productivity in the range of 10-20%; with some reporting as much as a 40% increase in levels of productivity (Yu, 2008).

All told, there are tremendous benefits associated with a successful virtual workforce. Employees are positively predisposed to working virtually and find personal and professional benefits associated with teleworking. Employers experience a reduction in operating costs along with an increase in employee productivity. Overall, the statistics underscore tremendous growth in the virtual workforce over time with the propensity for ongoing expansion into the future. Hence, it is with good reason, leadership behaviors that directly affect the success of the virtual workforce be examined.

Research Questions

The following questions relate directly to the factors that define the successful virtual workforce (productivity, retention, attendance, professional development, and opportunity for promotions). Each of the five research questions was addressed in terms of the responses to interview questions from study participants who are virtual workers in the field of Information Technology (IT) in California.

1. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee productivity?
2. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee retention?
3. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee attendance?
4. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee development?
5. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee promotions?

Significance of the Topic

The significance of this topic rests in the fact that leadership behaviors play a central role in defining the success of a virtual organization (Society for Human Resource Management, 2010). Lojeski (2010) asserts that with the speed of change, particularly towards the virtual workforce and away from the co-located models of office teams, the quality of leadership and its ability to adapt flexibly to the virtual environment is critical.

In as much as the number of virtual organizations has consistently increased since inception in 1970s (Johns & Gratton, 2013) and the working population continues to migrate to off-site locations, the need to understand what leadership behaviors most significantly contribute to a successful virtual workforce has become integral to sustaining fiscal viability in public and private sector organizations. Identifying and defining these leadership behaviors is the cornerstone of the topic at hand and the research contained herein, and lends itself to assisting leaders in the virtual space with insights into how to adapt and fine tune their behaviors towards the successful implementation and maintenance of a virtual organization.

To this end, research associated with this study rests on the premise that leadership behaviors required for an in-office workforce are unique from those required for a virtual workforce since the interpersonal leadership dynamics are colored by distance. Using a “one size fits all” approach that employs the same leadership techniques for collocated and virtual employees is not advantageous to the organization or to the employee since the needs of virtual employees are different from those who work in the traditional office environment (Bell & Kozlowski, 2002; Breu, Hemingway, Strathern, & Bridger, 2001; Chronos Consulting, 2011; Zaccaro & Bade, 2003). Unfortunately, the leadership of many firms treats the virtual workforce in the same manner as the co-located/in-office workforce – an approach that generally results in

employee disengagement, team tension, ongoing conflicts, and redefining human beings as “human doings” (Morris, 2008, p.132). In this situation, the role of the virtual employee can be easily relegated to metric analyses and productivity graphs, ultimately resulting in unintended consequences such as forestalling the workflow and deliverables (Morris, 2008).

Though everyone in an organization needs to take some form of ownership for properly defining interaction with the virtual workforce, the majority of the responsibility falls to the leader who must first focus on trust rather than technology (Morris, 2008). Given Morris’ perspective, the imperative for the leader of a virtual workforce is to first recognize the need to adopt different leadership methods for his/her virtual team. Virtual projects and employees are more likely to fail if leaders do not adjust their leadership to support the virtual workforce (Walker, 2010).

Both private and public sector organizations are increasing their use of virtual teams and are trying to address the fact that the leadership needs of virtual employees are different from the needs of employees who are office-based (Walker, 2010). The advent of the Telework Act of 2010 set the stage for more employees of the Federal Government to enter the ranks of the virtual workforce (U.S. Government Printing Office, 2010). The intent of the act was to lower operating costs, increase productivity, provide for a healthier balance between work and personal life, and ultimately create a “mobile powerhouse” (Tuutti, 2012, p. 1). It is interesting to note that while the majority of the focus on transition to virtual work within government has been on technologies that span enterprise and mission applications, more recent attention has been given to elements of leadership and culture change, and the inherent need to focus on encouraging, convincing, and re-training reluctant management who view telework with skepticism (Snyder, 2012). In addition to the public sector, private firms have also steadily increased their use of the

virtual workforce. In 2011, 563 North American firms were surveyed by WorldatWork (as cited by Rafter, 2011). The results indicated that 208 firms (37% of the 563 firms surveyed) employ full time teleworkers. In the survey, firms cited lower costs of operation as being the primary motivator in the move to a virtual workforce, but also emphasized the need for creating improved work/life balance, and providing leadership that is more attuned to the interpersonal needs of the employee.

Current literature points to the fact that in public and private sector virtual organizations, leaders need to adopt leadership styles that include the following characteristics;

1. a strong concern for the human element (Clemons & Kroth, 2011),
2. inspiration and motivation (Roy, 2012),
3. trust (Chronos Consulting, 2011),
4. clear and frequent communication (Cordery, Soo, Kirkman, Rosen, & Mathieu, 2009),
5. career-enhancing training (Walker, 2010).

These characteristics on the part of the leaders serve to increase the probability that the virtual workforce will demonstrate success, as defined above, in the areas of employee productivity, retention, attendance, development, and promotions at levels equal to or better than that of collocated organizations. Moreover, each leader can directly affect each of the elements that define a successful virtual organization by employing the five characteristics. For example, concern for the human element on the part of virtual leaders directly impacts each of the five elements of a successful virtual organization in terms of employee productivity (Nauman, Khan, & Ehsan, 2009), employee retention (Fisher & Fisher, 2001), employee attendance (Solomon, 2000), employee development (Fisher & Fisher, 2001), and employee promotions (Clemons &

Kroth, 2011). Specifically, virtual employees are more productive when acknowledged, empowered, and treated as individuals; they are more likely to remain with an organization when leadership respects and cares about their well-being; they are less likely to miss work when they are treated as individuals; they are more likely to develop professionally when they are given assignments that offer professional growth; and they are more likely to see promotions when leadership cares about and creates an environment that is receptive to upward mobility in the organization.

Key Definitions

1. Virtual Workforce – references that portion of the total workforce that works full or part time out of the traditional brick and mortar office.
2. Virtual Organization/Team – references an organization or part of an organization dedicated to a specific work function or work process where members work in two or more locations. A virtual team is a subset of the virtual workforce.
3. Virtual Worker/Teleworker – references a member of a virtual team and/or the virtual workforce.
4. Virtual Leader – references the leader of virtual worker(s).
5. Success in the virtual work environment – references a virtual organization that offers metrics greater than or equal to the comparable in-office organization in terms of employee productivity, retention, attendance, professional development, and upward mobility.

Key Assumptions

The key assumptions of this study include the following;

1. Research done heretofore provides input to defining the successful virtual organization as an organization with metrics greater than or equal to the comparable in-office organization in terms of employee productivity, retention, attendance, professional development, and upward mobility.
2. The parameters defining a successful virtual organization serve as the baseline and guidepost to questions for study participants.
3. The sampling of virtual workers in the field of IT is representative of virtual workers in other knowledge-based professions.
4. Findings from participant interviews will supplement prior research conducted with leaders of virtual organizations.

Limitations of the Study

Type of Work. The research of this study was limited to professionals in knowledge-based technology positions associated with IT. Hence, other fields and professions were not represented.

Geographical Boundaries. Research with participants was limited to the state of California.

Participants. Participants were limited to virtual employees. Individuals who were in-office leaders of virtual employees were not included.

Summary

The fundamental significance of this study rests with an assertion by Lojeski (2010) that with the speed of change, particularly towards the virtual workforce and away from the co-located models of office teams, the quality of leadership and its ability to adapt flexibly is critical. By and large, the virtual workforce presents a challenge for leadership to adapt to the

needs of the virtual worker on an individual and personal level. Furthermore, differences in geography, time zones, or cultures in a virtual organization underscore the need for leadership to focus on five factors; concern for the human element, inspiration and motivation, trust, communication, and training.

Addressing and building a virtual organization on each of these factors is core to success in the virtual work environment. Connecting at the human level is crucial in order to reduce ambiguity and potential conflicts (Morris, 2008). A people oriented leader whose influence is inspirational yields motivation on the part of the employee as well as commitment to the organization, team, and leader (Sims, Faraj, & Yun, 2009). Overall, communication at the individual level is key, and lends itself to building trust and generating job satisfaction (Fjermestad, 2009). Additionally, training for the virtual worker is important as it enhances productivity and reduces the degree to which virtual employees feel socially isolated (Venkatesh & Speier, 2000). These leadership factors form the foundation and support for a successful virtual organization. If leadership falls short in any or all of these areas, the probability of the virtual organization being successful falls.

Connecting these leadership factors to the elements that define a successful virtual organization is a good first step in identifying what is necessary to ensure success in the virtual workplace, but it lacks definition in terms of specific behaviors that virtual workers want and need from their leadership. Nonetheless, the preponderance of research in the area of the virtual workforce has focused on the leadership traits and characteristics for the virtual leader without addressing specific leadership behaviors. When coupled with the fact that the majority of study participants concerning the virtual workforce have been the leaders themselves, there is an

identifiable gap in the body of knowledge that warrants research of leadership behaviors in the virtual work environment from the lived experiences of the virtual workers.

Hence, the driving necessity of this research paper is the fact is that very little research has been done from the vantage point of the virtual workers themselves, and even less research has focused on their perceptions of specific leadership behaviors that support the virtual organization. In light of the scant research in this subject area, most if not all employ a quantitative approach. For example, a study in 2008 using a quantitative Ambassadorial Leadership Instrument for 266 participants revealed that ambassadorial leadership behaviors of delegation, impression management, and boundary spanning (such as free internal communication) are predictive of virtual organizational effectiveness (Ryan, 2008). In another quantitative study by Allen (2005) that surveyed 526 virtual employees, supportive leadership behaviors are linked to motivation in virtual organizations. In addition, a study by Moore (2007) examined the relationship between leadership behaviors and the motivation of virtual team members using a quantitative researcher-developed assessment of 104 virtual employees from 10 companies worldwide. The study determined that leadership behaviors need to be in alignment with goals and processes such that the relationships between team members and leadership offer encouragement as well as opportunities. Moore (2007) recommends that a qualitative approach to studying leadership behaviors in the virtual workspace be considered.

Examining the lived experiences of individuals who have worked in a virtual environment may bring greater clarity and identify individual leadership behaviors related to what is required to successfully lead a virtual team where productivity, employee retention, employee attendance, employee development, and employee promotions define the successful virtual organization.

Chapter 1 served to initiate research, as the intent to study the lived experiences of virtual employees, and their perceptions of leadership behaviors that support the elements of a successful virtual workforce. Chapter 2 offers a review of pertinent literature, and Chapter 3 presents the qualitative method and approach to the research.

Chapter 2: Literature Review

Chapter 2 is designed to address virtual work by way of a review of the literature centered on three primary pillars.

1. A theoretical framework of Transformational Leadership (introduced by Burns in 1978 and expanded on by Bass in 1985 with a core focus on interpersonal elements and traits such as individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence (Bass & Riggio, 2007; Jogulu & Wood, 2007, p. 37) and its relationship to the virtual workforce.
2. The critical characteristics needed for leading a virtual organization.
3. And the factors that define a successful virtual organization.

The architecture of this chapter is designed to focus on the sub-elements associated with each of the pillars and sets the contextual relationship of each with the virtual workforce. The chapter discussion begins in the context of historical and current drivers of change that have introduced a new definition to the architecture of the virtual workplace.

Historical Background

The practice of virtual work, or teleworking as it is sometimes referenced, is not new. In fact, the roots of the virtual workforce go back to 1972, when Jack Nilles, “The Father of Telecommuting”, then a University of Southern California researcher, merged the idea of telecommunication with transportation (Joice, 1998). According to Joice (1988), it was Nilles who first used the terms telework and telecommuting. Joice (1998) states that in 1979, “flexiplace” (p.1) was the term in vogue, and in 1981 J.C. Penney launched its first call center of home-based catalogue order-takers. By 1993 the Federal Government provided an official endorsement of telecommuting (Joice, 1998); and over time the size of the virtual workforce

began to grow with numbers of eight million in 1995 to 11 million 1997 (Joice, 1998). Though technology and economics were the primary drivers, government and industry quickly started to see benefits in employee recruitment and retention (Joice, 1998).

During the initial stages of the virtual workforce, there tended to be greater emphasis on the logistical elements of telework and less attention on the virtual worker. Particularly in the public sector, significant effort was devoted to authoring policy, acquiring equipment, and articulating time keeping procedures (Joice, 2000). Little, if any, focus was directed to leadership training for the virtual enterprise leader. In fact, it wasn't until 2003 that a handbook for managers and supervisors was drafted (U.S. Office of Personnel Management, 2003). Solomon (2000) asserts, "While employers may provide equipment and technology to telecommuters, that doesn't mean there will be a good cultural fit" (p. 60). Solomon (2000) emphasizes that with a focus on the virtual employee as an individual, improvements can occur in areas such as attendance, recruitment, retention, and morale.

With time, momentum for the virtual workforce increased and 2008 became the year that had the greatest impact on telework due to recessionary impacts, increases in the cost to commute, reaction to terrorism and continuity of service, increased emphasis on well-being, and dramatic improvements in technical connectivity (Hunton & Norman, 2010). These changes, especially the extraordinary leaps in technology set the stage for a new work model. Gibson et al. (2002) posit "Technological revolutions lead to people revolutions" (p. 80); and so is the case for technology and its impact on advancing the revolution in virtual work, and how work is performed in and out of the office.

In sum, the virtual revolution that began in 1972 has taken root due to technology, the competitive marketplace, and globalization. It has brought benefits and challenges to both

leadership and to the virtual employees who report to them. Over time, research has come to demonstrate that the shift to the virtual workplace involves much more than a blueprint for scaling technology; it requires a change strategy in leadership for those who work in the virtual space.

Context

The current need for the virtual workforce is largely influenced and driven by “relentless change, ferocious competition, and an unstoppable innovation technological evolution” (Hamel, 2012, p. ix). It is enabled and fired by the technological presence and ability to collaborate virtually (Hamel, 2012) allowing workers from different global locations to innovate by sharing ideas and concepts. While business models of the past were established in terms of farming, natural resources, and manufacturing; the current business landscape of imagination in the form of innovation and information has become the financial anchor of the 21st century (Bennis, 2000). The competitive topography is fierce and businesses are continuously beset by ongoing and unpredictable economic factors and globalization (Nafukho, Graham, & Muyia, 2010) that require them to constantly look to new paradigms and process changes to leverage their positions in the marketplace. In fact, the market, prices, and globalization are the tipping points that have driven changes in how businesses have evolved and now operate in a virtual setting (Chronos, 2011). Employing a virtual workforce offers a leveraged financial position as it provides for reduced leased office space, permits greater flexibility for scheduling customer support, supports geographically dispersed teams, and offers an advantage in acquiring niche talent and expertise (Roy, 2012)

As is the case with disruptive change, innovation creates new markets that beg the need to reevaluate resources, processes, and values (Christensen & Overdorf, 2000). In the context of

the virtual workforce, the virtual employee presents just such a challenge where processes in terms of technology and communication require reevaluation (Belanger & Allport, 2007) as do resources which require additional training (Chronos Consulting, 2011) and mentorship (Mulki et al., 2009); all of which need to be in alignment with the culture and value structure of the organization (Casio & Shurygailo, 2003).

Given that “virtual teams operate under conditions of challenge, confusion and uncertainty” (Purvanova & Bono, 2009, p. 345) leadership plays a key role in ensuring the virtual workforce is successful (Fjermestad, 2009). Critical to establishing virtual organizations is: that the change processes to a virtual setting begin before it becomes necessary, that an overall plan is drafted, that employees are trained to understand the magnitude of the change, and that processes are established to support the change (Christensen, Johnson, & Rigby, 2002). More recently, an expanded role in human resource departments, referred to as Virtual Human Resources Development (VHRD), has been constructed to address performance improvements in the virtual workforce (Nafukho et al., 2010). VHRD exists to maximize human capital in virtual organizations via virtual workplace training, communities of practice, wikis, etc. (Nafukho et al., 2010). The authors offer that with a preference for working in a virtual environment, younger workers who are the fastest growing group of professionals are expected to work well in a virtual environment. Nonetheless, support by VHRD is necessary to ensure this group as well as the millions of others who work virtually are given the opportunity to grow, produce, and thrive in the virtual environment (Nafukho et al., 2010).

Interestingly, processes, procedures, and the advances of VHRD are not sufficient to ensure success within virtual organizations. Research suggests that leadership for effective virtual teams is different than that of traditional face-to-face organizations (Nauman, Khan, &

Ehsan, 2009). In fact, the authors indicate that the virtual leader needs to be more flexible and permit others in the virtual organization to lead as situations warrant. Nauman et al. (2009), also postulate that the leadership style in the virtual setting needs to focus on relationship management, concern for each individual worker, and provide a level of empowerment suited to the capability of the employee. In their research, Nauman et al. (2009) found that these leadership characteristics must be practiced to a far greater extent in a virtual environment than in the more prevalent in-office setting.

Three Leadership Schemas Considered. The quest for determining a style most conducive to leading a virtual organization begins with an understanding that, by its nature, a successful virtual organization ultimately is driven by making work life better for employees (Peters et al., 2010). To this end, the authors examine three schemas for the relationship between a leader and follower in the virtual environment (Peters et al., 2010) that can benefit or challenge leaders as well as followers.

Governance Relationship. The first schema is the governance relationship between leader and follower, which lends itself to control and coordination and is one that can engender distrust (Peters et al., 2010). The attitude of leaders who espouse the governance approach to management is dominated by a sense of command and control and stems from their desire for direct visual supervision (Peters et al., 2010). This approach is consistent with Kanter (2001) who asserts, in general, leaders of virtual employees do not want to relinquish control or power. Kanter (2001) notes that leaders who perceive themselves as powerless, tend to be controlling; and as a consequence, supervise rather than lead. Interestingly, it is the conservative attitude of this type of leader that retards the full evolution of the virtual workforce employees (Peters et al., 2010). McCready, Lockhart, and Sieyes (2001) assert that managers need to change from an in-

person/controlling concept of leading to one of trust that is grounded in integrating virtual workers as well as providing an environment that lends itself to organizational commitment.

In a mixed methods study conducted by Peters et al. (2010) of 65 telework managers from six financial organizations from Netherlands, England, and Sweden, the results indicated most managers feel they need to be physically present in an office setting. Further, the participants in the study believed their employees are sidetracked when working at home, hence the leaders felt the need to be controlling. Overall, most of the participants were critical of telework, maintained a watchful eye on teleworkers, and admitted to a preference towards a governance approach to leading their virtual workers.

The governance protocol for leadership lends itself to transactional leadership where an organization is led in terms of “management by exception” and where employees are offered rewards or punishments depending on the degree to which they have met the contract (i.e. governance) for performance with their leaders (Bass, 1990). This type of leadership can lead to a hostile work environment especially when disciplinary threats loom large; Bass (1990) describes this as both counterproductive and ineffective. Somewhat akin to directive leadership, transactional leadership is aversive and focuses on problematic employees, and is sometimes seen in cases where leaders attempt to turnaround performance in exigent situations (Sims et al., 2008).

Avolio & Kahai (2003) posit that a transactional style can be beneficial for short-term tasks/projects, when timing of production deliverables is critical (Jogulu & Wood, 2007). Jogulu and Wood (2007) argue that there are times when the immediacy of the situation calls for the transactional approach (2007). However, overall, transactional leaders tend to manage by exception and offer performance-based rewards (Bass & Avolio, 1993). Bass and Avolio (1993)

assert that these leaders interface with their followers mostly in terms of performance agreements and neglect to consider human relationships. Hence, transactional leadership lacks the element of human concern and lends itself to short-term organizational situations.

According to Morello and Burton (2006) leadership needs to have relationships with employees that are symbiotic in nature. Morello and Burton (2006) further posit concerning organizations of 2015 and beyond, that leadership needs to see employees as individuals and give up the command and control mentality. Additionally, they assert companies with a control mentality are doomed. Overall, leadership needs to acknowledge and accept work taking place in various venues other than in the traditional office (Morello & Burton, 2006).

Exchange Relationship. The second schema speaks to the exchange relationship where responsibilities and expectations are clearly articulated. In the case of the virtual employee, the exchange is defined in terms of a trade of commitment for empowerment (Peters et al., 2010). This leadership style tends to be task oriented where influence occurs as a result of rewards (Sims et al., 2009) and where leadership is anchored on an exchange paradigm of rewards for compliance and performance. The rewards are generally material. This style can be effective when followers are very desirous of specific material rewards. It is interesting to note that this approach to leadership tends to negatively impact innovation since the focus and attention are centered primarily on the material rewards versus the task at hand (Sims et al., 2009).

Cooperation Relationship. The third relationship construct is the cooperation relationship where leader and follower are partners, and trust is the cornerstone of the relationship. Such is the case in virtual organizations where "Leadership in virtual teams will need to expend more effort on relational development than traditional teams" (Avolio & Kahai,

2003, p 334). Overall, the cooperation relationship construct is most closely aligned with a successful virtual workforce (Peters et al., 2010).

The three leadership schemas are thought provoking since they look at leaderships in terms of a control meter. That is to say, this is somewhat of a dashboard approach to leadership for the virtual environment where: when control increases, the probability of a successful virtual organization decreases, and when control decreases, the probability of success of the virtual organization increases. At the left side of such a dashboard meter is the highly structured governance model, and at the far right side is a model of empowerment.

These leader-followership relationships of governance, exchange, and cooperation offer a backdrop for the selection of transformational leadership as the leadership framework for this study. Fundamentally, there is no one leadership style that is best for all work circumstances and venues (“Leadership,” 2006). However, the following research indicates that transformational leadership as a theoretical framework for the virtual workforce offers insight into leadership traits that result in success for virtual organizations.

Chapter 1 introduced the definition of a successful virtual work force by way of research that defined the successful virtual organization as one that maintains metrics that are equal to or exceed in-office environments in terms of employee productivity, employee retention, employee attendance, employee development, and employee promotions. Chapter 1 also identified the leadership characteristics necessary for public and private sector virtual organizations. These include a strong concern for the human element, inspiration and motivation, trust, clear and frequent communication, and training. Research indicates such characteristics on the part of the leader serve to increase the probability that a virtual organization will demonstrate success.

This section of Chapter 2 has offered a backdrop to the virtual workforce as it set the context of the paper and highlighted the disruptive change of technology as well as the dynamics in the marketplace that have forced the expansion of the virtual workforce. In addition, this section has compared three leadership schemas: governance leadership as possibly being beneficial for short term projects, exchange leadership as task oriented and not particularly well-suited for innovation and knowledge work, and cooperative leadership that is focused on partnership and trust and most suited to the virtual workspace.

Theoretical Framework – Transformational Leadership

Reviewing Bennis' truisms of leadership offers an insight into the difference between leadership and management. Specifically, he asserts in one of his truisms that "...Leaders are people who do the right thing; managers are people who do things right" (Bennis, 1991, p. 4). In terms of leadership, Bennis (1991) underscores the importance of vision, goals, empowerment, and trust. Each of these elements ties closely with Bennis' leadership themes of employee significance, team spirit, employment excitement and motivation, and quality outcomes (1991). Over time, the challenges that have plagued leaders for decades still remain. Issues such as competition, the war for talent, and disruptive innovation present ongoing dilemmas (Bennis, 2000) for those who are charged with achieving revenue metrics, meeting deadlines, and ensuring the production of quality products and services. In 2000, Bennis predicted that organizations in the year 2010 and beyond must look to empowerment and autonomy for employees if they are to survive.

In light of the challenges that present themselves in the current marketplace and the need for leadership that offers vision, empowerment, and trust, the theoretical framework for this study rests on Bass' theory of transformational leadership. Bass and Avolio (1993) asserted that

while culture in an organization is influenced and formed by its leadership, leadership development could be molded by the culture. So, for example, if the culture of an organization is highly procedural, the style of the leadership may evolve into a transactional style.

Unlike transactional leadership, which rests upon contingent rewards, transformational leadership is people centric, motivational, and inspirational; and may be directive or drive participation as the situation dictates (Bass, 1999). Simply put, Bass (1999) stated, “The transformational leader emphasizes what you can do for your country; the transactional leader, on what your country can do for you” (p.9). During the twenty years between 1978 and 1998, Bass (1999) defined the marketplace as the driver towards the transformational leadership of autonomy and away from the transactional leadership of intense oversight. Bass (1990) noted the following.

When a firm is faced with a turbulent marketplace...transformational leadership needs to be fostered at all levels in the firm. In order to succeed, the firm needs to have the flexibility to forecast and meet new demands and changes as they occur – and only transformational leadership can enable the firm to do so. (p.29)

In as much as the transformational leader brings an organization a sense of creativity and invites followers to be creative as well (Shin & Zhou, 2003, as cited by Robbins & Judge, 2011), the organization is better postured to endure during periods of turbulence that require innovation in order to remain fiscally solvent. Methods of doing business have evolved dramatically over time globalization, diversification, and collaborative virtual teams have become the norm (Jogulu & Wood, 2007). These mainstream conditions are consistent with the marketplace turbulence that Bass (1990) posited as a basic need for transformational leadership. Concurrent with these changes in the marketplace and business processes, Jogulu and Wood (2007) also speak to the development of a more contemporary style of leadership; specifically, transformational leadership.

While transactional leadership rests squarely on rewards and disciplinary actions, transformational leadership is more strongly characterized by the empathy, trust, tolerance, mentoring, communication, vision, motivation, flexibility, and inspiration of the leader (Jogulu & Wood, 2007). In fact, transactional leadership is considered as the path to mediocrity since it is essentially passive and reacts when production metrics are not achieved (Bass, 1990). Bass asserts that transactional leadership is passé since many operations have evolved from manual to knowledge-based organizations (2007) and require transformational leadership, which tends to result in "...enhanced commitment, involvement, loyalty, and performance of followers" (Bass, 1999, p. 11).

Though Poutiatine (2009) sees transformational leadership as somewhat new, and lacking a "firm footing" in the field, a number of other leaders in the subject area view it as a fundamental anchor for leadership practices in the growing environment of the virtual workforce. For example, given the somewhat anonymous nature of the virtual workplace, transformational leadership transcends the anonymity by its nature which is characterized as both an active and effective leadership style (Bass, 1990). In the context of virtual organizations, transformational leadership as described by Bass (1990) is a leadership style of "superior performance" (p.21) and has been found to be more effective in terms of higher levels of productivity in virtual teams than in face-to-face organizations (Bass, 1999; Purvanova & Bono, 2009). Unfortunately and surprisingly, transformational leadership occurs less frequently in virtual environments than in office settings (Provanova & Bono, 2009). However, Bass indicates that even leaders who are not predisposed to leading with a transformational style can be trained to "inspire, energize, and intellectually stimulate their employees" (Bass, 1990, p. 19).

All factors considered, transformational leadership is the leadership style that best serves the virtual workspace. It offers a blend of attributes that keeps the virtual employee as an individual in focus. It encourages the intellect in a knowledge-based environment. It inspires virtual workers to perform at their best; and it provides influential role modeling. Through vision, goal setting, empowerment, and trust, transformational leadership serves as a most appropriate framework for this study. The following section introduces the four elements that characterize transformational leadership: individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence.

The Four I's of Transformational Leadership. Transformational leadership is anchored by niches of “individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence” (Jogulu & Wood, 2007, p. 37). The Four I's as they are commonly referenced tend to elevate the organization in term of performance, productivity, and maturity (Bass, 1999; Purvanova & Bono, 2009). Overall, transformational leadership offers more support for employee motivation and performance than does transactional leadership (Tejeda, Scandura, & Pillai, 2001). Table 1 cross walks the Four I's with their associated leadership traits and organizational results.

Table 1
Transformational Leadership Areas

Transformational Leadership Areas (Bass & Avolio, 1993)	Traits (Bass & Riggio, 2006; Jogulu & Wood, 2007)	Results (Purvanova & Bono, 2009)
Individualized Consideration	Mentoring, listening, confidence building, respect, coaching, sociability, feeling, encouragement, autonomy	Creates pride on the part of employees concerning their abilities and uniqueness
Intellectual Stimulation	Communication, problem solving solicited, innovative thinking encouraged, training, ideas are not criticized	Promulgates analytical and logical thinking, and innovation

(table continues)

Transformational Leadership Areas (Bass & Avolio, 1993)	Traits (Bass & Riggio, 2006; Jogulu & Wood, 2007)	Results (Purvanova & Bono, 2009)
Inspirational Motivation	Role modeling, encouragement, inspiration, provides meaning and challenge, creates team spirit, instills commitment	Creates enthusiasm and confidence
Idealized Influence	Vision, emotional sensitivity, charisma, role model, emulated, interactional, consistent, highly ethical	Inspires devotion and loyalty

The following subsections build on and clarify the Four I's of transformational leadership (Bass & Avolio, 1993) in the context of the virtual workforce.

Individualized Consideration. Bass and Avolio (1993) characterize transformational leadership somewhat as a culture of family with a sense of interdependence and a long-term commitment to others on the team. Fundamental to inspiring and motivating a virtual family is the need to build and sustain relationships via trust where individual team members feel comfortable sharing their thoughts and ideas (Cordery et al., 2009). This involves creating a “psychological safety net” where there is no fear of retribution, where honest communication ensues, and where team members believe their ideas are appreciated (Cordery et al., 2009). These elements combine and motivate employees to put forth their best work (Cordery et al., 2009). Accordingly, Cordery et al. (2009), assert that interpersonal facilitation and attending to the human element of virtual employees by leadership is crucial. In the context of individualized consideration, research concerning the virtual organization relies heavily on elements such as feedback and recognition, and empowerment as described below.

Feedback and Recognition. One of the most often overlooked elements of positive leadership in virtual teams is feedback to individual team members in the form of effective and consistent appraisals (Leonard, 2011). Leonard (2011) contends this form of interaction can make virtual employees feel an integral part of the organization and reinforce a sense of

connection to the organization. Since virtual employees do not have the benefit of frequent face-to-face interaction with leadership, Leonard encourages early and frequent performance feedback to underscore to the virtual employee that he/she is a valued member of the team (2011). In addition, virtual employees need to be included in succession planning so they understand they are being recognized for their work in the context of promotion and career advancement (Leonard, 2011).

Cordery et al. (2009) assert that rewards and recognition are integral to the success of the virtual team. These acknowledgements further emphasize the importance of team and individual achievement, and offer the teammates the pleasure of seeing their work spotlighted in other corporate settings (Cordery et al., 2009).

Empowerment. Sims et al. (2008) view empowerment as a characteristic of transformational leadership as it allows “one who leads others to lead themselves” (p. 150). Overall, the authors see the empowering leader as one who creates an organization of responsibility, initiative, and confidence. Curiously, there may be a disconnect between leader perception and employee perception of empowerment within the organization (Leeman, 2010). While some leaders believe sharing power means sharing political power and possibly losing footing within the corporation, Leeman (2010) asserts that employees view being empowered as having the latitude to make decisions regarding their own work and sphere of concern. Hence, this type of desired empowerment on the part of the virtual worker speaks to autonomy in one’s own work, not necessarily influencing the upper echelon of the company.

Perhaps the definition of empowerment is best stated by Bens (2007) who offers guidelines for team facilitation and empowerment. Bens addresses the concept in terms of project teams where the organization is self-managing, the members are knowledge workers and

subject matter experts (SMEs), and the team self-selects a leader (2007). Bens' (2007) guidelines include setting the vision, communicating, ensuring feedback, engaging the organization, collaborating, and providing for the growth and development of the team. The overall intent is to ensure that team members see themselves as valued, trusted, and empowered partners (Bens, 2007). The process speaks to 10 steps that include: dialogue to encourage the integration of a new leader, collaborative visioning to ensure shared goals, team launch/building, structured review of the operation, employee surveys, post activity debrief, conflict negotiation, feedback from team peers, resolving interpersonal conflict, and coaching (Bens, 2007).

Ward (1996) cites several benefits of empowering employees including an increase in overall productivity and job satisfaction among employees, as well as a decrease in absenteeism. Ward (1996) also goes on to indicate that unfortunately, managers in general have difficulty in dealing with a loss of control when they are held accountable for the bottom line. Equally unfortunate, is that some leaders still view telework as idiosyncratic (Peters et al., 2010). Ultimately, for leaders, virtual work comes down to trust in the capabilities of the employees (Peters et al., 2010), and a willingness on the part of the manager to transition to a leadership style that provides sufficient mentoring and coaching to create empowered virtual employees (Ward, 1996).

Overall, empowerment results in employees who perceive themselves as significant, feel like part of the team family, are excited and passionate about their work, and produce quality outcomes/products (Bennis, 1991). In particular, Nauman et al. (2009) found that empowerment of employees tends to be more prevalent in virtual organizations. According to Zeithaml et al. (1988) knowledge-based technology environments are more conducive to the empowering methods of transformational leadership. Virtual work environments are just such environments

and should involve leadership that deemphasizes supervision and control, and provides for individual and team empowerment (Peters et al., 2010). In addition, Breu et al. (2001) assert workforce agility is enhanced through empowerment in the form of autonomous decision-making and collaboration in the virtual work environment. More importantly, the authors state that whether organizations are adapting to economic challenges or the speed of technological change, they must be intelligent, collaborative, and empowering in order to be sufficiently agile to withstand the pressures of the speed of change.

Intellectual Stimulation. Avolio and Kahai (2003) offer that a transformational leadership style may best lend itself to the creative pursuits of new out-of-the-box solutions where challenges serve to provide virtual workers the chance to be innovative in their thinking. This is essential to organizational viability since imagination in the form of innovation and information has become the financial anchor of the 21st century (Bennis, 2000). In fact, Breu et al. (2001) view the virtual workforce as one that specifically needs to be agile in terms of competencies that align with the development of new skills. An intellectually stimulating environment is consistent with the workforce agility so necessary for speed and flexibility in an environment of ongoing change (Breu et al., 2001).

All told, a more transformational and participative leadership style works well for a team addressing the relatively unstructured problems that arise in a virtual environment that fosters innovation (Avolio & Kahai, 2003). A transformational leader who is participative may be able to more easily overcome the distance challenge by creating informal chat rooms to engage virtual workers to offer solutions, ideas, and opinions before final go-forward decisions are made (Avolio & Kahai, 2003). By encouraging and supporting the free flow of communication for

innovative thinking, leadership sets the stage for intellectual stimulation, enhanced creativity, and innovation.

Inspirational Motivation. The virtual workforce presents a number of challenges to its leadership. Among these is the need to determine how best to motivate employees who are physically absent from the brick and mortar office, and how best to lead and mentor someone who may be in another state or country (Avolio & Kahai, 2003). Avolio and Kahai (2003) further offer that providing the level of inspiration to motivate employees requires the leader to communicate excitement and pride through a vision – preferably one communicated through visual media where positive energy can be shared.

One of the most important functions of a leader in a virtual environment is to be a model team player and set the stage, terms, and conditions for his/her team members to successfully be a part of the virtual teamwork environment (Cascio & Shurygailo, 2003). A leader who is people oriented provides influence through inspiration that subsequently yields motivation and commitment on the part of followers, and results in a team that works well independently (Sims et al., 2009). Additionally, the authors contend this level of influence tends to encourage and empower followers to self-lead (Sims et al., 2009). Furthermore, in the context of self-leadership and independence, the motivational element of transformational leadership serves to inhibit social loafing that might easily occur in a virtual environment (Avolio & Kahai, 2003). Cascio and Shurygailo (2003) stress that formal training for leaders should include social cues in an anonymous environment, social protocol, and common culture values. The authors underscore that leaders must evolve to new level of collaboration, socialization, and communication since all three support the leaders' ability to better inspire and motivate a virtual team (Cascio & Shurygailo, 2003). In a challenging economy, leaders are beset by the need to innovate with

respect to their overall style of leadership since organizations have become flatter and the workforce almost demands a say in decisions (Kanter, 1981). Kanter (1981) posits that leaders face a less controllable environment and must adapt by providing general directions and offering a voice to their employees; simply put, they must order less and inspire more.

Nierenberg (2010) adds an interesting, albeit informal, twist to inspirational leadership wherein leadership takes the form of a maestro to the extent that the leader acts as a conductor of an orchestra providing a vision along with inspiration, and enabling employees to perform. He sees leadership as a form of teamwork where team members interact in a way that improves performance and productivity. As such, organizational members must feel empowered to do their jobs just as musicians feel empowered to execute music to the vision of a maestro (Nierenberg, 2010). Just as a maestro views the orchestra as a vital living organism so too must the leader see followers as living beings rather than machines of production (Nierenberg, 2010). All too often, however, employees are viewed as objects within the organization – simply there to produce and ensure the organization meets its metrics (Goleman, 2006).

In a study of 247 employees from 41 locations and 91 organizations considered the following question (Joshi, Lazarova, & Liao, 2009). Does inspirational leadership play a greater role in virtual teams than it does in face-to-face teams? The results of the research indicated that inspirational leadership was positively correlated with assisting employees in achieving organizational goals and that while inspirational leaders are important to all organizational architectures, they are especially and even more crucial to virtual teams (Joshi et al., 2009).

All told, the virtual organization is challenging for leadership where the benefits of face-to-face contact are largely absent and leaders must attempt to motivate and inspire employees without the benefit of seeing the body language and physical nuances. Hence, specific behaviors

that drive energy in the workplace need to be developed through organizational vision and energy. Much like the maestro inspires the orchestra through consistency, timing, feedback, and empowerment, leaders in the virtual work world must execute their roles with an ongoing focus on inspiring and motivating their virtual teams.

Idealized Influence. Transformational leadership is often defined in terms of charisma, motivation, and consideration towards employees (Purvanova & Bono, 2009). Idealized influence, which has been likened to charisma, tends to drive employees to a greater sense of loyalty and commitment to the organization (Purvanova & Bono, 2009). Purvanova and Bono (2009) offer that through this aspect of transformational leadership, the sense of organizational mission is instilled and nurtured. Idealized influence is evidenced by leader of a virtual organization acting as a model for virtual employees in terms of their behavior (Lojeski, 2010); a behavior that anchors itself in mission and creates pride, respect, and trust on the part of followers (Robbins & Judge, 2011).

Beyond charisma, idealized influence results in a sense of confidence of employees about their leader that allows them to accept and adapt to organizational changes (Simic, 1999). In essence, the leader is more than an authority figure; he or she is a role model whom others desire to emulate (Simic, 1999). This is evidenced by a sense of trust and admiration on the part of followers who then work to achieve and manifest the vision set by the leader (Simic, 1999). In a virtual organization, learning to influence from a distance is critical. Hence, leaders must work more diligently to development relationships with their staffs (Morris, 2008). In fact, the key to successful virtual leadership is using influence on a social level to affect new attitudes and behaviors of team building, and providing a sense of social integration of team members, their information, and their communication (Fjermestad, 2009).

In sum, the Four I's offer the baseline and foundation to transformational leadership. They underscore the import of leadership's role in ensuring employees feel: valued as individuals and confident in their work, enthusiastic and encouraged to do their best, eager to innovate, and stimulated to follow their leader as a role model. In addition, as pillars for virtual leadership, the Four I's are essential to virtual leadership that requires a high level of trust and empowerment for employees. Identifying individuals who can successfully lead a virtual organization is core to creating a successful virtual organization. Hence, testing for transformational leadership is an important component to establishing and driving the virtual organization.

Testing for Transformational Leadership. The Multifactor Leadership Questionnaire (MLQ) first offered by Bernard Bass in 1995 provides a method to measure leadership traits in the context of transactional and transformational styles (as cited by Tejada et al., 2001). Bass (1999) notes that while effective leaders can possess traits of both transformational and transactional leadership, the end result of the evaluation will point to one style over the other.

The leadership assessment of the MLQ evaluates the level of effectiveness of a leader across his/her level of active or passive leadership involvement, and can be used to increase levels of transformational leadership (Bass, 1990). Highly effective and active leaders are characterized in the model as leaders who build trust, act with integrity, inspire others, encourage innovation, think, coach followers, and reward achievement; while those who are less effective and passive avoid involvement, fight fires, and monitor the mistakes of others (MLQ, 2007).

As described by Tejada et al. (2001), the leadership factors/indicators addressed in the MLQ instrument include the Four I's noted above. More specifically, the factors described in practical terms are: individualized consideration related to the personal attention a leader gives to

each employee; intellectual stimulation which encourages thought, creativity, and innovation; motivation to perform at one's best; and influence by way of charisma which addresses ability to instill a sense of pride and understanding of the overall mission of the organization (Tejeda et al., (2001). For transactional leadership, the MLQ indicators include: contingent reward as an exchange for support, and management by exception focused on mistakes and errors (Tejeda et al., 2001).

Additional instruments can be used to identify leader traits. Among them is the Organizational Description Questionnaire (ODQ), which integrates leadership, culture, and performance (Bass & Avolio, 1993). According to the ODQ, the more transformational the culture, the more effective individual and organizational performance is (Bass & Avolio, 1993). In addition, the Leader Behavior Description Questionnaire (LBDQ) addresses task-oriented and consideration behaviors ("Leadership," 2006) which appear to parallel the concepts of transactional and transformational leadership.

In sum, the use of these instruments serves to offer the diagnostic tools as a method for identifying the primary leadership style of individuals charged with leading an organization. In addition, testing for leadership traits linked to transformation leadership is essential to identifying individuals to lead in the virtual environment with a focus on the individual, inspiration and motivation, and a level of intellectual stimulation to advance innovation.

Virtual Employee Leadership Preferences

In addition to assessing the style of the leader, a look into the preferences and dislikes of virtual employees concerning leadership adds dimension to the picture of the virtual organization. Of note, the personal predilections of virtual employees point to generalized traits more often witnessed in the transformational leader, while the dislikes of virtual employees tend

to be characteristic of the transactional leader. Though there is scant research in the area of virtual employee leadership preferences, the work of Fisher and Fisher (2001) offer some insight into what virtual employees desire of leadership in the overall context of offsite work. The authors point out that leadership preferences of virtual employees align with elements of transformational leadership such as concern for development, fairness, and respect. Fisher and Fisher (2001) also cite that virtual workers dislike leadership traits that reflect a transactional style including micro-management and the lack of needed communication. Preferences and dislikes are summarized in Table 2 and speak to a paradigm of leadership commitment versus leadership control (Fisher & Fisher, 2001).

Table 2

Preferences and Dislikes of Virtual Workers (Fisher & Fisher, 2001, p. 32)

What virtual workers prefer	What virtual workers dislike
Coordination	Control
Accessibility	Inaccessibility
Adequate Information	Information Overload
Feedback	Advice
Fairness	Favoritism
Decisiveness	Intrusive Supervision
Honesty	Manipulation
Concern for Development	Apathy
Community Building	Coordinated Isolation
Respect	Paternalism or Condescension

Overall, the preferences of virtual workers concerning leadership speak to the transformational characteristics of: individualized consideration in terms of fairness, honesty, and respect; intellectual stimulation via a concern for development; inspirational motivation by way of community building and feedback; and idealized influence through accessibility. While the dislikes of virtual employees align with characteristics more frequently associated with transactional leadership such as control and direct supervision (Fisher & Fisher, 2001).

Critical Leadership Characteristics in the Virtual Workplace

As described by Walinskas (2012, p. 1), making the adjustment to leading a virtual organization is not intuitive,

Most American models of leadership still use the top-down, authoritarian style of communication when dealing with "subordinates." We glorify the strong, brave, dictatorial styles of Jack Welch in business and Patton on the battlefield. Everything has its place and in the virtual landscape, the world has never been flatter! You cannot have an imposing, physical presence or command and control in the same way as you might when co-located with your staff. It's too easy to simply tune out. They have to want to and enjoy working for you, and here is where the working conditions of 2011 are butting heads with the classic business-school management philosophy and hierarchical organization chart.

According to Roy (2012), leaders in the virtual environment need to be strong in relationship building that is anchored in trust, is sustainable, creates team spirit, and is motivational by form. They need well-honed technical skills as well as exemplary leadership skills (Roy, 2012). Perhaps most importantly, they need to be able to be sufficiently empathetic to handle the frustration faced by their staff members (Roy, 2012). In fact, over all else, leadership in a virtual organization is the single factor that drives and determines the success of the organization (Walker, 2010). The following sections and associated research serve to shed light on frequently cited leadership characteristics needed in the virtual work environment.

These include:

1. a strong concern for the human element (Clemons & Kroth, 2011; Fisher & Fisher, 2001; Fjermestad, 2009; Morris, 2008; Nauman et al., 2009; Yu, 2008;),
2. inspiration and motivation (Gibson et al., 2002; Joshi, et al., 2009; McCready et al., 2001; Purvanova & Bono, 2009; Roy, 2012; U.S. Office of Personnel Management, 2011; Sims et al., 2009),

3. trust (Bell & Kozlowski 2002; Brown, Poole, & Rodgers, 2004; Chronos Consulting, 2011; Joshi et al., 2009; Kossek & Van Dune, 2008; Malhotra et al., 2007; McCready et al., 2001; Montero, 2004; Morello & Burton, 2006; Morris, 2008; Peters et al., 2010; Roy, 2012; Zaccaro & Bader, 2003),
4. clear and frequent communication (Avolio & Kahai, 2003; Belanger & Allport, 2007; Bell & Kozlowski, 2002; Cascio & Shurygailo, 2003; Chronos Consulting, 2011; Cordery et al., 2009; Fjermestad, 2009; Golden & Fromen, 2011; Kayworth & Leidner, 2000; Madlock, 2012; Malhotra et al., 2007; McCready et al., 20001; Montero, 2004; Mulki et al., 2009; Rafter, 2011; Rein, 2012; Roy, 2012; Walker, 2010; Wakefield, Leidner, & Garrison, 2008; Yu, 2008; Zaccaro & Bader, 2003; Zhang & Fjermestad, 2006),
5. and career-enhancing training (Cooper & Kurland, 2002; Kayworth & Leidner, 2000; McCready et al., 2001; Mulki et al., 2009; Venkatesh & Speier, 2000; Walker, 2010).

In graphical terms, Table 3 includes the elements that define a successful virtual organization (employee productivity, employee retention, employee attendance, employee development, and employee promotions) and the relevant leadership characteristics that affect the success of the virtual organization (i.e. concern for the human element of employees, inspiration and motivation for employees, communication with employees, training for employees). Hence, Table 3 serves as a matrix expression of the factors of a successful virtual organization and the leadership characteristics that support these factors. The crosswalk of the factors and the characteristics are supported by the research citations contained in each cell of the table.

Table 3
Leadership Characteristics and Elements of the Successful Virtual Organization

Leadership Characteristics	Elements of the Successful Virtual Organization				
	Productivity	Retention	Attendance	Development	Promotions
Concern for the Human Element	Virtual employees are more productive when acknowledged, empowered, and treated as individuals (Nauman, Khan, & Ehsan, 2009).	Virtual employees are more likely to remain with an organization when leadership respects and cares about their well-being (Fisher and Fisher, 2001).	Considering the virtual worker as an individual positively influences attendance (Solomon, 2000).	Development of virtual employees rests with leadership providing assignments that offer professional growth (Fisher & Fisher, 2001).	Leadership that cares about virtual employees creates an environment that is receptive to upward mobility in the organization (Clemons & Kroth, 2011).
Inspiration and Motivation	Inspirational leadership is correlated with virtual employees' focus on achieving organizational goals (Joshi et al., 2009).	Leadership that is inspirational and motivational tends to result in commitment and loyalty from the employee (Bass, 1999, p. 11).	Emphasis on well-being in a virtual team influences the commitment demonstrated in areas such as attendance via technical connectivity (Hunton & Norman, 2010).	It is important to motivate virtual employees by assisting them to rise to their potential performance (Clemons & Kroth, 2011).	Inspiration and motivation of transformational leadership in virtual teams lays the ground work for upward mobility (Kanter, 2001).
Trust	Leaders' trust is positively related to virtual team performance (Joshi et al., 2009).	It is incumbent upon leadership to foster relationships of trust to retain the virtual workers in the knowledge community (Morello & Burton, 2006).	The trust associated with teleworking results in a flexibility that leads to less absenteeism (Gibson et al., 2002).	A virtual leader must lead and build relationships of trust where everyone develops through shared ideas and expertise (Malhotra et al., 2007).	An attitude of trust on the part of the virtual leader needs to be aligned to ensure the empowerment and potential of virtual employees (Peters et al., 2010).
Communication	Virtual employees require extensive feedback and information to enhance productivity (Fisher and Fisher, 2001).	Communication feedback encourages virtual employees to feel a part of the organization and reinforces a connection to the organization (Leonard, 2011).	Virtual teams led with appropriate communication and fewer interruptions see productivity increases correlated with decreased in absenteeism (Gibson et al., 2002).	Informal communication with employees aids in development and overall expertise, (Cooper & Kurland, 2002).	Communication and inclusion in succession planning is critical so that employees see recognition for their work in the context of career advancement (Leonard, 2011).
Training	A productive virtual organization requires a gap analysis of virtual employees is conducted for both IT and non-IT (Yu, 2008).	Leaders who ensure appropriate training to virtual employees experience long term retention of employees (Otfinoski, 2010).	Developing virtual employees via collaborative training is core to their engagement; this level of engagement influences attendance (Busch, Nash, & Bell, 2011).	Leadership must ensure virtual workers have opportunity to grow and thrive through virtual training and online communities of practice (Nafukho et al., 2010).	Professional development and advancement of virtual employees is integral to change management and implementation of virtual organizations. (Yu, 2008).

In sum, a review of the literature as cited above clearly points to the five elements that support a successful virtual organization. These elements are core to driving and positioning a virtual organization to succeed in the ever-increasing presence of virtual work. The leadership characteristics of a strong concern for the human element, coupled with inspiration and motivation, trust, clear and frequent communication, and career enhancing training are the pillars that support the elements that define the successful virtual organization (employee productivity, employee retention, employee attendance, employee development, and employee promotions).

Strong Concern for the Human Element. Fjermestad (2009) defines the challenge of leadership in a virtual environment as a social one that is tempered by technology, and achieves improvements in employee attitude, behavior and productivity; and where accomplishment is realized when people, information, and communication work in synergy.

Selecting and training leaders to adapt to the virtual work environment requires engaging leadership to relate effectively on a human level (Chronos Consulting, 2011). Fjermestad (2009) describes the effective virtual leader as someone who is adept at the processes associated with social-influence as well as the technologies associated with information and communication. Fjermestad (2009) further defines the leadership challenge as one that relies heavily on the ability to affect new attitudes and behaviors of team building within the workgroup without the benefit of face-to-face interface. Morello and Burton (2006) assert that leadership needs to see virtual employees as individuals.

In fact, virtual leaders need to make an effort to interface with virtual employees more so than they do with in-office employees. Otherwise a feeling of isolation can develop and negatively affect the virtual employee in terms of feeling ignored, inconsequential, and not providing value and contribution to the organization (Leonard, 2011). Isolation is one of the

most daunting situations facing virtual employees where such feelings can lead to lower job satisfaction and increased turnover (Mulki et al., 2009). According to Mulki et al. (2009), it is important for leaders to understand that this challenge exists for all virtual employees but is especially greater for those who live alone or are relatively new to an organization. It is incumbent upon leaders, therefore, to check-in with employees frequently, socialize the team, engage employees to share personal information, and create mentor-protégé arrangements of collaboration (Mulki et al., 2009).

In addition, Wagner (2004) asserts that it is important for leaders to recognize individuals who work virtually since it is easy for their contributions to go unnoticed, and where their work products frequently become part of a team database. This situation adds to the instability of the faceless employee in the virtual workforce (Solomon, 2000). Since virtual employees do not have the luxury of receiving kudos when visiting the office coffee machine with their leaders, virtual leaders need to remind themselves to offer congratulatory comments and gratitude for a job well done through phone calls as well as personal communications and messages (McCready et al., 2001). Overall, McCready et al., (2001) emphasize it is incumbent upon the virtual leader to exert the extra effort necessary to notice and recognize the value each employee brings to the virtual team. McCready et al., go on to underscore Wagner's assertion by indicating that a social inclination towards rewards and recognition is critical for the virtual leader to effectively manage a virtual team (2001). Similarly, on a social level Cascio and Shurygailo (2003) suggest that virtual leaders strive to promote a sense of close interpersonal cooperation, be clear in their expectations and processes, and provide encouragement and recognition.

Clemons and Kroth (2011) speak to the need for leaders of virtual organizations to make a significant investment in knowing and understanding each virtual employee, and developing

and maintaining a one-to-one relationship that focuses on each employee's professional and personal dreams and goals. Understanding each employee without the benefit of face-to-face interaction requires an added effort on the part of the leader. However, the additional effort can ultimately result in a more motivated employee (Clemons & Kroth, 2011).

In addition to Clemons and Kroth's (2011) analysis of leadership in the virtual workforce, Lojeski (2010) offers a leadership model for the virtual workforce that looks at distance in terms of affinity or relationship fissures, operational alignment gaps, and location challenges. Using a triangular model, Lojeski (2010) adds dimension and analyzes the leader/follower dynamic in virtual settings. In defining issues associated with affinity, Lojeski (2010) cites distance challenges that are further exacerbated by differences in culture, social interaction, and relationships. Issues stemming from operational gaps tend to take the form of communication misunderstandings and employee readiness, while physical separation can be impacted not only by location but also by differences in time zones. Both Lojeski's (2010) and Clemons and Kroth's (2011) approaches build on the elements of Bass' transformational leadership construct, but with added attention to the complications that are embedded in the virtual work environment.

Therefore, caring about the virtual employee, not simply in terms of his/her professional products, but through: a level of genuine interest in the person, maintaining a focus on developing and promoting each team member, and engendering a real connection with each individual in the virtual organization is integral to the success of the individual and the organization (Clemons & Kroth, 2011). Additionally, ensuring that virtual employees have enjoyable and appropriately challenging assignments adds emphasis to a level of care and concern on the part of leadership (Clemons & Kroth, 2011).

Inspiration and Motivation. Inspirational leaders are important to all organizational architectures, however, they are especially and even more crucial to virtual teams (Joshi et al., 2009). In their research, Joshi et al. (2009) found that inspirational leadership was positively correlated with assisting employees and focusing on achieving organizational goals and productive performance. Furthermore, the authors articulated that inspirational leadership includes defining a shared vision, identifying specific goals, and exuding a sense of professional confidence that is contagious to virtual employees. Additionally, Kouzes and Posner (1987) identified that the practice of creating a shared vision sets the stage for seeing what is possible in an organization and generating a commitment that cannot be forced, only inspired. It is interesting to note that the process of inspiring is an integral part of the leader's socializing effort that underpins his/her relationship with the virtual team as well as the level of trust among the individual team members (Joshi et al., 2009).

According to Roy (2012) virtual leaders need to be strong in relationship building that is motivational by form. Roy (2012) posits that leaders in a virtual environment need well-honed technical skills and exemplary leadership skills that encourage team members to be supportive of each other. Perhaps most importantly, virtual leaders need to be able to be sufficiently empathetic to handle the frustration faced by their staff members so as to maintain motivation and momentum. Roy (2012) further asserts that virtual employees can become and remain motivated by leadership via informal off-the-record conversations, information sharing, as well as private corporate Facebook pages that encourage collegiality and relationships.

Providing a climate in the virtual organization anchored in inspiration and motivation serves to support the employee in terms of creating a sense of contagious enthusiasm for the work at hand. A climate created by leadership to be robust in social interaction and rich in

relationship building serves to inspire virtual employees to move forward in achieving a shared vision of organizational goals.

Trust. Clemons and Kroth (2011), assert that trust is the force within a virtual organization that creates and maintains a sense of cohesiveness in the work environment and is core to relationships. In fact, in the virtual organization, trust can be termed a form of social capital, a capital more valuable than financial capital (Clemons & Kroth, 2011). In 2003 when approximately 20% of the workforce participated in some form of telework, Cascio & Shurygailo studied 29 virtual workforce teams and found that leaders of teams with the highest levels of trust were the most productive and shared the following characteristics: they started their interactions on a social basis creating a positive team dynamic, they defined clear roles for the team members, and they maintained a positive attitude. Leaders need to be strong in relationship building that is anchored in trust, is sustainable, creates team spirit, and is motivational by form (Roy, 2012). In fact, the level of trust in a virtual organization can and should be unconditional unless the employee proves untrustworthy (Kostner, 1994; McCready et al., 2001).

Trust on the part of leadership is core to the virtual organization and needs to be aligned to affect empowerment of virtual employees, which subsequently results in attracting and engaging virtual workers (Peters et al., 2010). Zacarro and Bader (2003) as well as Cordery et al. (2009) note that trust is more important for virtual teams than for in-person teams and that it is critical for the leaders to foster the interaction that allows teammates to share information about themselves and their values. Research indicates that trust is positively related to virtual team performance and is integral to motivating virtual teams (Joshi et al., 2009). Morello & Burton (2006) predict the worker of the future will be more of a free agent who maintains a

collaborative community and trusted partnerships. Hence, it is incumbent upon leadership to foster relationships of trust to retain the virtual teams and workers of the knowledge community.

Brown et al. (2004) used intense research concerning trust in the context of virtual collaboration as well as the Interpersonal Complex Model (ICM) developed by Henry Stack Sullivan to posit that virtual workers and leaders who lack traits of affiliation (i.e. warmth, sociability, friendliness) tend to exhibit less trust in a collaborative setting, are less likely to initiate interaction/communication with others in the virtual organization, and are less able to collaborate effectively in the virtual environment. The ICM plots individual levels and ranges of dominance to submission behavior, and hostility to affiliative orientations. The authors argue that including an evaluation of trust via the ICM can be effective in staffing teams who must work virtually. Additionally, they state, "it is not the individual who fuels collaboration, but the interaction...between collaborators" (Brown et al., 2004, p. 133). Further, Brown et al. (2004) assert, "Trust is the glue that binds collaborators by fostering faith that both parties will contribute and not behave opportunistically" (p. 117).

According to Zaccaro and Bader (2003), establishing, building, and maintaining trust in a virtual organization or e-team begins with a form of "calculated trust" (p. 384), which is predicated on mutual goals, and a vision of success. The role of the virtual leader is to take calculated trust to the level of "identification-based trust" (p. 383). Identification trust, which is the highest form of organizational trust, exists when the leader and individual team members' relationships evolve to the point where values are shared, and where a strong sense of comfort exists between and among the leaders and employees in sharing personal and professional information (Zaccaro & Bader, 2003). The process of growing trust begins with an e-leader who communicates frequently and is clear in goals and objectives. Ultimately, trust has evolved

when the leader is able to affect a level of communication that includes social and personal information in an enthusiastic manner and creates an e-team persona/identity. It is interesting to note that Zacarro and Bader (2003) assert that identification trust is more important for virtual organizations than for in-person organizations.

Noting the importance of trust throughout an organizational environment, Brown et al. (2004) use telemedicine as an example of the importance of the need for trusting collaboration. In an environment such as telemedicine surgery, multiple parties in multiple locations rely heavily on the actions and decisions of leaders and colleagues. Without established trust among those involved, actions and progress may be impossible. It is interesting to note, that by its very nature, virtual work demands the kind of employer/employee trust that ultimately leads to empowerment that enables action and progress on the part of the organization (Peters et al., 2010). Hence, it follows that a top priority in a virtual organization should be oriented to building relationships of trust where team members share ideas and expertise, and where each person sees the others as committed contributors to the team's objectives (Malhotra et al., 2007).

Oft noted as a binding force in an organization, trust acts as the gelling agent to unify leaders with followers, and followers with each other. Without the benefit of in-person interface, those working in a virtual organization need and rely heavily on trust to share information and move projects forward. Overtime, if nurtured, levels of trust grow and mature within the virtual organization to eventually include both professional and personal trust where all members of the virtual team are comfortable with each other.

Clear and Frequent Communication. In virtual organizations, leaders must have well-honed skills in written and verbal communication to share the goals of the organization and to bridge the geographic and social gap between leader and employee (Fjermestad, 2009).

Furthermore, Fjermestad (2009) asserts that a high level of effective communication helps to build trust between the employee and the leader, reduces the sense of employee isolation, and enhances job satisfaction for team members. According to Morris (2008) the leader in a co-located environment needs to focus communication on the overall team; while in a virtual workforce, one-on-one communication with each individual is crucial, as each employee must come to feel integral to the work, and valued by management as an individual. Morris (2008) posits that communicating and connecting at the individual level is of paramount importance and can pay handsome dividends in terms of employee engagement and productivity.

Salas' (2009) analysis includes the need for feedback as a component to intellectual stimulation as he offers a plethora of leadership tips for managing virtual teams. These include: frequent communication driven by explaining protocol and guidelines, established procedures and monitored goals, and feedback and recognition (Salas, 2009). According to Salas (2009) communicating effectively with virtual teams requires a focused and concerted effort.

In addition, Breu et al. (2001) assert that overall agility of the virtual organization can be improved by using Information and Communication Technology (ITC) as the basis for collaboration between and among virtual workers. The authors assert that since the disparate locations of the virtual workforce can reduce flexibility and responsiveness, ICTs provide an antidote in the form of anytime and anyplace collaboration, whether they exist in web spaces or groupware.

On the other hand, communication in the context of technology must be used with caution since the likelihood for miscommunication is increased in a technology rich environment where in-person communication is absent (Reed-Woodward, 2007). Avolio and Kahai (2003) stipulate that the leader of a virtual team is in the precarious position of managing a group of

workers where technology can exacerbate miscommunications. In electronic communication, intent can easily be misinterpreted. According to Wakefield et al. (2008), virtual work environments tend to experience more conflict than co-located teams and therefore leadership needs to communicate and review correspondence to insure against misinterpretation of the message. Therefore, given the danger of miscommunication, leaders must continually focus on creating trust, giving clear directions, and communicating concisely. The challenges of miscommunication are not easy to overcome in a working environment where a leader does not have the benefit of reading the body language of his/her employees. The leader must therefore exert extra effort to analyze bilateral communication in an attempt to understand employee's point of view and ensure ongoing and effective collaboration in the virtual environment.

In sum, the repeated reference in the literature to the need for well-developed communication skills sheds light on the complexity of the leadership role in a highly networked web of virtual interface – a network that includes interactions that, depending on the situation, will be one-to-one, one-to-many, or many-to-many. The virtual leader stands in the center of these communications and must balance both social and communication interfaces which can have become intricate and difficult to manage (Fjermestad, 2009). In an electronic environment technology glitches breed frustration, they exacerbate personality differences, and they give rise to cultural misinterpretations. Such challenges require creative methods on the part of leadership to increase communication and relationship building (Roy, 2012). Without deliberate and enhanced communication (i.e. teleconferencing, videoconferencing, groupware, email, social media, avatars, blogs, etc.) on the part of leadership, members of the virtual workforce can experience confusing and inaccurate messages, become disconnected from their team (Roy, 2012; Whittle & Mueler, 2009), develop a sense of workplace isolation, suffer a loss of

professional identity (Wagner, 2004), and acquire a disaffection for the organization as a whole (Whittle & Mueller, 2009). As a result, virtual organizations are more intricate than office-based organizations and require a greater emphasis on communication and focused teamwork (Zhang & Fjermestad, 2006).

Career Enhancing Training. In general, the virtual workforce is primarily a knowledge intensive workforce as opposed to a physical workforce (Belanger & Allport, 2007) where ongoing training in the developments and nuances of specific knowledge areas is critical (Cascio & Shurygailo, 2003). In response to this need Mancuso, Chlup, and McWhorter (2010) have examined the virtual workforce as an incubator for adult learning. The authors report that the media rich nature of the technology of the virtual work environment offers the groundwork for additional distance learning configurations, which are crucial to maintaining the technical currency of virtual employees.

It is interesting to note workers in the 20-29 age group value developmental opportunities more than older workers (Cole, 2012). In fact, as it relates to employee retention, personal career development ranks high on their list of employee job imperatives (Cole, 2012). However, the lack of professional development is a huge cause of concern among virtual workers as they can easily be passed over for training and promotion since they lack corporate visibility (Walker, 2010). In creating, growing, and maintaining a virtual organization, formally establishing the need for training and development as it relates to retention of the virtual employee is critical (Walker, 2010).

Altogether, it is interesting to note that the literature underscores the importance of each of the essential leadership characteristics for the virtual workspace. Equally interesting is that each of these characteristics tracks to the Four I's of transformational leadership. That is to say,

concern for the human element aligns with individualized consideration in which leadership supports each virtual worker on a personal level through mentoring, listening, and respect (Jogulu & Wood, 2007). Inspiration and motivation along with communication track to inspirational motivation in which the leader of a virtual organization is central to providing the motivational impetus that supports and propels the team through role modeling and encouragement to overall improved performance (Jogulu & Wood, 2007). Trust aligns with idealized influence in which the leader displays charisma anchored in emotional sensitivity; and career enhancing training that tracks to intellectual stimulation in which employees are offered training opportunities to remain abreast of changes and developments in their fields (Jogulu & Wood, 2007).

The Successful Virtual Organization Defined

An analysis of the research defines a successful virtual organization as having metrics that equal or exceed those of an in-office organization in terms of:

1. employee productivity (Chronos Consulting, 2011; Maruyama & Tietze, 2012; Rafter, 2011; Robertson & Vink, 2012; Snyder, 2012; Solomon, 2000; Venkatesh & Speier, 2000; Walker, 2010; Yu 2008),
2. retention (Chronos Consulting, 2011; Cole, 2012; Gajendran & Harrison, 2002; Gibson et al., 2002; Mulki et al., 2009; U.S. Office of Personnel Management, 2011; Rafter, 2011; Snyder, 2012; Solomon, 2000; Tutti, 2012; Venkatesh & Speier, 2000),
3. attendance (Gibson et al., 2002; Mulki et al., 2009; Rafter, 2011; Rein, 2012; Robertson & Vink, 2012; Sharit et al., 2009; Synder, 2012; Solomon, 2000; Venkatesh & Speier, 2000; Walker, 2010),

4. professional development (Breu et al., 2001; Cascio & Shurygailo, 2003; Chronos Consulting, 2011; Cole, 2012; Cooper & Kurland, 2002; Golden & Fromen, 2011; Joch, 2012; Kayworth & Leidner, 2000; Maruyama & Tietze, 2012; Malhotra et al., 2007; McCready et al., 2001; Mulki et al., 2009; Rein, 2012; Venkatesh & Speier, 2000; Walker, 2010; Yu, 2008; Zaccaro & Bader, 2003),
5. and job promotions (Cooper & Kurland, 2002; Elsbach & Cable, 2012; Kanter, 2001; Leonard, 2011; Mulki et al., 2009; Solomon, 2000).

While these five factors define the successful virtual organization, the primary driver behind each of the elements is leadership. As posited by the Society for Human Resource Management (2010), "effective leadership is the number one factor that influences success in a virtual organization" (p. 1). The following sections expand on the research and results related to each of the factors that define a successful virtual organization and offer the leadership characteristics that influence each.

Productivity. In general, one of the benefits of sound leadership that espouses cohesion and commitment in the virtual environment is increased productivity (Snyder, 2012). Clemons and Kroth (2011) offer a contemporary and interesting approach as it relates to leading the virtual workforce. In their architecture, leaders and followers work together as partners with the leader fostering involvement and inclusion with an end goal of continual adaptation as well as performance/productivity improvement. Overall, the leader provides role definition, resources, and expectations while addressing the human element of the organization by enhancing lines of communication, providing coaching, and supplying motivation throughout the virtual organization (Clemons & Kroth, 2011). As a result, productivity of the virtual organization increases.

In a survey of 83 companies, Chronos Consulting (2011) found virtual organizations showed improved productivity, lower costs, and a larger talent pool. Similarly, in a survey of 354 British telecommunications employees conducted by Maruyama & Tietze (2012), data was gathered concerning pre and post telework implementations. All told, the participants found telework to be a positive experience. Prior to teleworking, employees actually underestimated the possible positive experiences of teleworking and overreacted to potential negative aspects. The post survey of the research indicated that overall productivity improved.

Rafter (2011), in a survey of 563 firms where 37% of the workforce is comprised of full time teleworkers, found improvements in productivity among the virtual workers. Additionally, in a study of six firms conducted in the Netherlands where the prevalence of telework is comparable to the U.S., the results pointed to improved productivity in virtual work environments (International Telework Association, as cited by Robertson & Vink, 2012). However, while improved productivity can frequently occur in virtual organizations, it is often linked to an improved morale largely driven by leadership that remains mindful that though teleworkers are not visible on a daily basis, they cannot be ignored if the organization is to succeed (Solomon, 2000).

Unfortunately, by the very nature of its construct, virtual work can cause employees to feel isolated (Venkatesh & Speier, 2000). Venkatesh and Speirer (2000) posit that leaders who introduce and employ gamification into the work environment can use this as a methodology for effectively implementing a telework environment that results in enhanced productivity and reduces the degree to which virtual employees feel socially isolated. The authors found that games, as a tool for learning technology, tended to increase ongoing usage of the technology, and were intrinsically motivating. Through research of 69 teleworkers, whose average age was 41,

results indicated that by using gamification (which included an avatar of the student) over a traditional approach of lecture training, the teleworkers were more intrinsically motivated to perform and to use the system than those who received traditional training. In addition, these virtual workers demonstrated an increase in individual productivity (Venkatesh & Speier, 2000).

In sum, in order to increase productivity in the virtual organization requires significant reliance on leadership to ensure employees remain engaged (Yu, 2008). In terms of specifics, a shift to a virtual workplace environment on a corporate level involves a thorough change management plan inclusive of all parts of the organization. It also includes: a gap analysis of people and their stages of professional development, a review of processes, procedures, and policies, and an analysis of safety parameters and security/risk mitigation (Yu, 2008).

Implementation should occur in stages using lessons learned and best practices from each phase to improve implementation of subsequent phases (Yu, 2008). This can occur on a function-by-function basis, or team-by-team basis (Yu, 2008). Of paramount importance is that everyone affected by the change becomes part of the decision making process (Yu, 2008). Led well, the journey to a virtual organization can result in productivity gains of 10-40% (Yu, 2008).

Nonetheless, according to Morris (2008) many organizations do not make leadership adjustments focused on virtual teams, and as a consequence many virtual organizations fail. In fact, less than half of telework situations succeed due to inexpert leadership (Walinskas, 2012). Hence, it is imperative that leadership makes adjustments in their leadership behaviors to accommodate the distance factors of time and space facing virtual employees.

In summary, using the same leadership methods as office-based groups, maintaining an out-of-sight out-of-mind mentality, and relegating virtual workers to the level of robotic contributors can cause disengagement of the virtual workers. It can also result in a tendency of

virtual workers to delay the workflow, and a loss of well-being that comes from being ignored by leadership (Morris, 2008). Learning to influence from a distance is critical for virtual leaders and they must strive to develop individual relationships with their virtual employees (Morris, 2008). Morris asserts that the virtual leader must balance attention to virtual workers while clearly articulating expectations and task assignments (2008). The virtual leader needs to build teams in terms of connections of social capital where each individual is viewed as an individual and contributing member to the team (Morris, 2008). Developing social capital with virtual workers is a compelling requirement if the virtual organization is to increase productivity and achieve success (Morris, 2008). Simply put, "Leadership makes telework work" (Offstein & Morwick, 2009, p. xvii).

Retention. Employee retention in the private and public sectors is critical. Maintaining in-house tacit knowledge is highly valued and near impossible to transfer or access after an employee has left an organization. All told, there are a number of cost elements associated with employee attrition including the cost to recruit, loss of corporate memory, and impact to other team members. In fact, it has been documented that the time, effort, and expense associated with losing an employee can be daunting since it includes separation costs, vacancy costs, and acquisition costs (Applebaum & Milkman, 2006). For example, advertising, referral fees, recruiting fees, preparing and conducting interviews, and referencing checking can comprise a significant portion of the overall expense of employee replacement (Applebaum & Milkman, 2006). In addition to hiring, training costs, as well as decreased productivity further compound the financial challenge (Applebaum & Milkman, 2006). Overall, in professional and knowledge-based industries the costs associated with replacing a lost employee can be more than the annual salary of the employee (Applebaum & Milkman, 2006).

In the case of virtual employees, there are various reasons offered for remaining on the job. One reason, as cited by Gibson et al. (2002) references the immediate and tangible benefit of a reduced commute time. Another reason, most often valued by younger employees, goes to recognition and development (Cole, 2012). For the more seasoned employees, communication and clear expectations are most valued (Cole, 2012). However, additional reasons for remaining with an organization that transcend age groups include: opportunity for advancement, involvement in decision making, use of talents, personal development, and quality and supportive leadership (Cole, 2012). Overall, retention in virtual organizations is higher than in office environs (Solomon, 2000). Perhaps this is due to an improved sense of work-life balance which many teleworkers may not want to risk by transferring to another company (Rafter, 2011).

Overall, well-being plays a dominant role in influencing retention. Gajendran and Harrison (2007) through a meta-analysis of 46 studies of 12,883 employees, posit that telework has positive effects on autonomy, work/family interfaces, job satisfaction, performance, retention, and stress reduction. Gajendran and Harrison's (2007) research speaks to improved interface of leaders and followers when leaders provided autonomy to their virtual employees. The results of the research identified perceived autonomy as the most crucial mediator of telecommuting benefits.

In sum, implementing the virtual work environment can increase retention, increase productivity, reduce stress, and reduce absenteeism (Telework research Network as cited by Snyder, 2012). Companies such as AT&T, Accenture, IBM, and P&G have launched highly successful virtual organizations on a globalized basis and have found positive benefits in employee retention and loyalty, collaboration, and overall job satisfaction (Mulki et al., 2009). The net result is that leaders who remain mindful of the important role virtual workers play in

their organization with satisfying assignments and appropriate rewards and recognition are more likely to retain these employees (Cole, 2012; Solomon, 2000).

Attendance. According to Almer and Kaplan (2002), virtual workers tend to experience less stress, less burnout, and less emotional exhaustion than employees who work in the traditional office environments. Little or no commute and a quiet environment that lends itself to enhanced concentration contribute to a greater sense of well-being and improved attendance on the virtual job (Sharit et al., 2009). Further, virtual workers experience higher job satisfaction than their in-office counterparts, again resulting in lower rates of absenteeism (Almer & Kaplan, 2002).

Interestingly, however, not only is absenteeism lower in the virtual workspace, the average number of work hours tends to be greater than those worked in corporate settings (Noonan & Glass, 2012). In their study of datasets from the National Longitudinal Survey of Youth and the U.S. Census Current Population Survey from the 1990's through 2005, the researchers found that the most severe issue associated with virtual work is a longer work week. Dubbing the syndrome of working more than the traditional 40 hour week in the virtual setting, a “work devotion schema”, Noonan and Glass (2012, p. 45) raise the specter of employers demanding more work hours from virtual workers into nights and weekends. This tendency, coupled with the lack of visibility may cause employees to overcompensate and over promote themselves in order to be recognized (Mulki et al., 2009). For these reasons, Mulki et al., (2009) advise that leaders set limits on work and prioritize assignments.

Development. In a virtual organization, leaders need to provide for career development through training plans that are specifically designed for the virtual worker (Walker, 2010). In fact, results-oriented continuous developmental improvement is critical to the ongoing success of

the virtual organization (Fisher & Fisher, 2001). In a qualitative study of 93 public and private sector employees and leaders, conducted by Cooper and Kurland (2002), researchers found that developmental training not only resulted in improved performance, but also reduced the sense of isolation virtual workers found to be pervasive in virtual work environments.

Communities of practice can also be instrumental in developing virtual employees (Nafuko et al., 2012). In effect, leaders who introduced communities of practice as a methodology for developing virtual workers did more than improve employee performance; they set the stage for improved relationships among team members and reduced the sense of loneliness and separation among colleagues (Nafuko et al., 2012). Such communities served to enhance levels of expertise (Cooper & Kurland, 2002), leverage and increase trust (Malhotra et al., 2007), and motivate virtual employees to achieve performance potential (Clemons & Kroth, 2011).

Breu et al. (2001) suggest that there are five elements that differentiate the virtual workforce and make it agile, these include; intelligence, competencies, collaboration, and culture, and information systems. The authors further posit that the elements can create an interdependence allowing each to be more effective in terms of overall levels of agility and performance metrics. These themes are consistent with Zaccaro and Bader (2003) who focused on the development of e-team dynamics where emotional intelligence, communication, and conflict resolution are emphasized and result in enhanced collaboration and overall development of workers in the virtual work environment.

Promotions. Leadership sometimes overlooks the potential for upward mobility for virtual employees in an organization, as they are more influenced by employees who are physically present (Solomon, 2000). In fact, in a virtual organization, employees may not be in a

position to be considered for promotions and special projects. This is particularly true if leadership in the virtual environment does not pay attention to virtual employees on an individual level, and where virtual employees come to feel disconnected and isolated (Solomon, 2000). This is also the case where performance criteria and metrics are not adequately defined (Elsbach & Cable, 2012). However, when performance expectations are articulated and leadership is connected with virtual employees, the extent of disconnection and isolation is minimized such that morale, retention, and attendance improve; and greater focus is given to promoting these individuals (Elsbach & Cable, 2012; Solomon, 2000). Overall, unless leadership evaluates individuals on an objective metric-based model, virtual employees can suffer from lower evaluations, fewer promotions, and smaller pay raises (Elsbach & Cable, 2012). Unfortunately, many times leadership evaluates performance subjectively on merits that are a direct result of simply being present (Elsbach & Cable, 2012). Elsbach and Cable (2012) contend the concept of "passive face time" can influence a leader's impression an employee. Passive face time occurs when an employee is seen in the hallways, comes to work early, or stays late (Elsbach & Cable, 2012).

In a 2010 qualitative study of 39 leaders, Elsbach, Cable, and Sherman studied the effects of employee face time on managerial perceptions. As a result of interviews, findings indicate there are expected face times (during normal work hours) and extracurricular face times (before and after normal work hours); and these face times are noted by both superiors and coworkers (Elsbach et al., 2010). The researchers also reported that face time influences the kinds of subjective traits managers assign to employees such as being responsible or dependable (Elsbach et al., 2010). In addition, results indicated that for those employees who presented extra face time, managers were 25% more likely to evaluate these employees as dedicated or committed.

In addition, employees who were visible during working hours were 9% more likely to be seen as dependable or responsible (Elsbach et al., 2010). Oddly, managers tend to be unaware that they are making value judgments about an employee relative to face time. Cooper and Kurland (2002) found that the issue and impact of face time is not as critical in the public sector as it is in the private sector, since the government process for advancement tends to be well defined and anchored in objective and specific procedures. Nonetheless, in order to resolve inequities in pay or promotions, the researchers advocate for performance measures that are impartial, and include peer involvement in a 360-evaluation schema (Elsbach & Cable, 2012).

Leonard (2011) advocates that leaders should keep virtual employees engaged by offering ongoing feedback and ensuring they feel connected to the organization. Lest virtual employees feel ignored by and inconsequential to the organization, leaders should not only consider them for promotions, but also include them in succession planning efforts for the organization (Leonard, 2011).

In sum, given the faceless nature of virtual work, virtual employees may be invisible when it comes time for leadership to dole out promotions. As a result, employees who are physically present in an office building are the ones who are considered for advancement. Hence, it is incumbent on leaders to ensure regular communication with each virtual employee occurs, that performance metrics are articulated, and that each virtual employee is recognized for promotions as appropriate.

Summary

Chapter 1 introduced the topic of successful virtual organizations in terms of the five factors that drive a successful virtual organization. The five factors include employee productivity, employee retention, employee attendance, professional development of employees,

and promotions/professional advancement of employees. The chapter also established the purpose of this study to examine the perceptions of virtual workers concerning which leadership behaviors positively or negatively impact the performance of a virtual workforce in the context of the five factors of a successful virtual organization.

Chapter 2 examined various leadership styles that may add to or detract from success in a virtual organization, and established that transformational leadership offered the best framework for the virtual workforce. As such, Chapter 2 anchored this study in the framework of transformational leadership and the four associated components that drive transformational leadership; individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence. Through an extensive review of the literature, five positive leadership traits were found as direct links to leadership in a successful virtual organization: a strong concern for the human element, inspiration and motivation, trust, clear and frequent communication, and career enhancing training. These traits align with four primary components of transformational leadership (individualized consideration, inspirational motivation, intellectual stimulation, and idealized influence). Figure 1 demonstrates the process alignment for a successful virtual workforce, components of transformational leadership, and leadership traits used in this study. By combining the four elements of transformational leadership along with the associated leadership traits, and then adding the five factors that define the long-term success of a virtual organizational, the course for establishing and sustaining a thriving virtual organization is constructed.

This level of process alignment drives an environment and culture that values the human element of the organization. Such an alignment is critical in the virtual workspace where the human element is often lost in the isolated work venue.

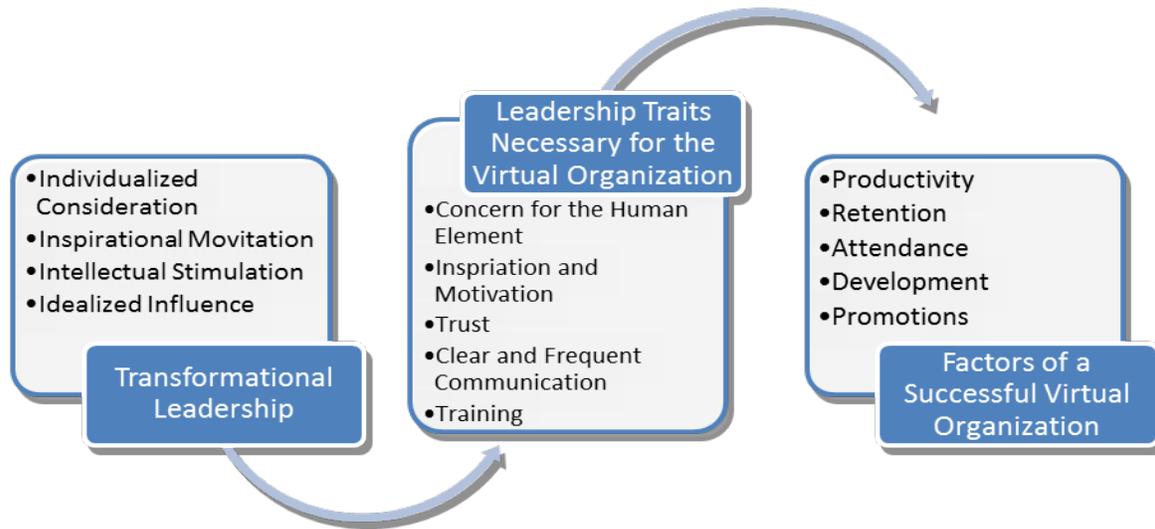


Figure 1. Process alignment for theoretical framework, leadership traits, and success factors for the virtual organization

Transformational leadership offers the best blend of traits necessary to remain in step with the evolving landscape of the virtual workforce. Examining the lived experiences of individuals who have worked in a virtual environment, and identifying specific behaviors that model the five positive leadership traits associated with the success factors of virtual organization may offer a construct of behaviors for leaders to employ in implementing and maintaining a successful virtual organization.

Conclusion

While there is a reasonable amount of literature documenting virtual organizations, much of it is couched in opinions of leaders and there is little focus on the perceptions of the virtual workers themselves. Similarly, while there is a reasonable amount of literature documenting leadership styles and traits in the virtual organization, there is scant research concerning specific leadership behaviors that support virtual organizations. The purpose of this study is to examine the lived experiences of employees who work virtually and their perceptions of leadership

behaviors that create a successful virtual organization. This research is necessary in order to offer leaders of virtual organizations insights into specific behaviors they should employ to enhance the success of the organization through employee productivity, retention, attendance, development, and upward mobility of their employees.

In light of Chapters 1 and 2, it is fitting that further research into effective behaviors for the virtual leader is conducted at this point in time from the viewpoint of the virtual employee in the hopes that additional clarity will be provided for current and future leaders of virtual organizations. The intent of the research is to examine the five indicators of a successful organization in light of leadership behaviors that virtual employees observe and experience in their organizations.

Chapter 3: Methodology

Qualitative by form, this study is designed to bring focus to the perceptions and insights of virtual workers concerning behaviors of their leaders in the shifting and expanding landscape of virtual work. As a phenomenological examination of the lived experiences of virtual employees and their perceptions of leadership behaviors that positively or negatively impact the success of a virtual organization, this study seeks to offer a perspective of virtual leadership from the vantage point of the virtual employee. The intent of this research is to bring specificity to the role of leadership behaviors within the virtual workforce in the hopes that leaders in a virtual venue will adopt positive behaviors to increase the odds of success in their organizations with respect to employee productivity, retention, attendance, development, and upward mobility.

The theoretical framework of the research contained herein centers on transformational leadership introduced by Burns in 1978 and expanded on by Bass in 1985 with a core focus on interpersonal elements and traits such as individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence (Bass & Riggio, 2006, p. 176; Jogulu & Wood, 2007, p. 37). Since all too often virtual leaders do not navigate very well through the challenges associated with having a virtual workforce, they find their virtual teams do not achieve predetermined metrics and thus are deemed failures (Morris, 2008). This study is designed to search for insights from virtual employees who may hold the key as to which specific leadership behaviors may remedy this situation.

Research Questions

Each of the following five research questions was addressed in terms of the responses to interview questions (Appendix A) from study participants who are virtual workers in the field of IT in California.

1. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee productivity?
2. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee retention?
3. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee attendance?
4. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee development?
5. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee promotions?

Table 4 crosswalks the interview questions (IQ) with the five research questions (RQ). Each pair of interview questions is aligned with each of the research questions. The research questions are based on the five success factors of a successful virtual organization (employee productivity, retention, attendance, development, and promotions).

Table 4
Crosswalk of Interview and Research Questions

Interview Questions (IQ)	Research Questions (RQ)				
	RQ1 Productivity	RQ2 Retention	RQ3 Attendance	RQ4 Development	RQ5 Promotions
1. What does your leader do that causes you to be more productive?	X				
2. What does your leader do that makes you less productive?	X				
3. What does your leader do that makes you want to stay in the organization?		X			
4. What does your leader do that makes you want to leave the organization?		X			
5. What does your leader do that makes you want to work on any given day?			X		
6. What does your leader do that makes you want to take the day off?			X		

(table continues)

7. What does your leader do that supports your professional and/or personal development?					X	
8. What does your leader do that is an obstacle to your professional and/or personal development?					X	
9. What does your leader do that positions you for a promotion?						X
10. What does your leader do that keeps you from getting promoted?						X
11. Are there any other leadership behaviors that you would like to cite that are particularly helpful or harmful to you in your organization?	X	X	X	X	X	X

Description of the Research Methodology

The research methodology for this study is qualitative by form and includes interviews of 17 participants. The number of participants for this research study was based on a recommendation concerning phenomenological research by Dukes in 1984 (as cited by Creswell, 2007). In addition, participants for the study were limited to IT professionals who work in the public or private sectors of the IT contracting community in California. Participants were drawn from a professional trade association, the American Council for Technology (ACT) and Industry Advisory Council (IAC) Pacific. The ACT IAC Pacific membership is comprised of government and industry professionals in California who work collaboratively to promote communication across government and industry in the area of IT.

Participation in this research was limited to those who work virtually at least three days per week and have done so for at least one year. The researcher invited the participants via an email invitation (Appendix B) using the ACT IAC Pacific mailing roster. This approach is consistent with Roberts' (2010) guidance as it relates to sample selection and procedures. Prior to interviews, participants received, signed, and returned an informed consent form (Appendix C) to the researcher.

Participant interviews were each one-hour in duration, conducted on a not-for-attribution basis, and included the interview questions listed above in Table 4. The questions were designed to explore the participants' views of specific behaviors related to their leaders. In particular, the interview questions probed into leadership behaviors that affected the participants' individual productivity, retention, attendance, development, and upward mobility.

The interviews were audio recorded and immediately following the interviews, the researcher transcribed the recordings. HyperTranscribe software was used to transcribe the interviews. During the transcription process, the researcher redacted all references to names of individuals, their leadership, and their companies. Once the transcription process was complete the audio files were destroyed.

Process for Selection of Data Sources

Through purposeful sampling, the researcher sent out a request to participate in the study. The invitation followed coordination with, and permission from the government and industry chairpersons of the ACT IAC Pacific to use the organization's mailing list. The email invitation was used to recruit participants and down-selected those individuals who met the study criteria (i.e. virtual work experience of at least one year in duration, currently working virtually at least three days per week, and corporate or government affiliation in the field of IT in California).

The email request included a statement that indicated: participation in the research is voluntary, the participation and answers to the study questions by individual participants are confidential, a stipulation that the participant willingly agrees to participate in the study, and that the survey results will be used to increase the body of knowledge concerning the perceptions of leadership behaviors by virtual employees.

Drawing from the responses that met the criteria of this study, the first 15 individuals who responded were invited to participate. That is to say, the first 15 responses that fulfilled the sampling criteria were selected to participate in the study. Following their selection, the researcher contacted the participants by phone/email to establish rapport, ensure each participant met the criteria for participation in the study, and to review the process, parameters, and purpose of the study. According to Roberts (2010), sampling procedures that are well defined serve to provide for and enhance the credibility of the study. As the process to set up dates/times for the interviews continued, it became apparent that some of the participants had challenging and unpredictable schedules. Hence, several additional potential participants became part of the sample taking it to a total of 18 potential participants. As it turned out, one of the potential participants could not schedule the time for the interview and a total 17 individuals participated in the study.

Definition and Validity of Data Gathering Instrument

In advance of commencing the participant interviews, this study used consensual validation that “seeks the opinions of others” (Creswell, 2007, p. 204). Specifically, three doctoral colleagues who have experience with virtual organization(s) and/or working virtually were asked to review the interview questions as well as the research questions. Each was asked if the interview questions aligned with the research questions this study sought to answer. In all three cases, the colleagues or “competent others” as termed by Eisner in 1991 (as cited in Creswell, 2007, p. 204) responded in the affirmative.

Following the consensual validation, and during the process of analyzing participant interviews, the strategy for ensuring the validity of this study included the review, coding, and textual analysis of the interview data. The researcher, as well as a doctoral colleague/peer

reviewer conducted this process. The qualifications of the peer reviewer included: doctoral candidacy in the field of organizational leadership; experience in the area of virtual work; and hands-on education in the area of qualitative coding and analysis. The peer reviewer signed a non-disclosure agreement and review statement (Appendix D) attesting that information related to the review of interview data would not be shared or discussed with anyone other than the researcher, and that the process of inter-rater review and consensus had occurred.

The use of a peer reviewer, in addition to the researcher, to code and analyze the data provided for inter-rater reliability to support the validity of the study as described by Roberts (2010). The results of the independent review were compared with that of the researcher, and where differences existed in coding, discussions took place until discrepancies were resolved and consensus was achieved. This approach was designed to support the internal validity of the study and is consistent with Creswell's (2007) advocacy for bracketing bias on the part of the researcher that might influence conclusions. In the event that consensus could not have been achieved, discrepancies in opinion would have been addressed and resolved by the dissertation chair. Overall, the validity of the analysis and interpretations of the results of this study were supported by the participant selection, interviewing processes, and inter-coder-reliability.

Reliability of Data Gathering Instrument

In terms of reliability, a number of processes included in this study lent themselves to repeatability and consistent results. The first of these is the process that engaged participants from the broad based ACT IAC Pacific mailing list with selection based on a "first come, first served" process. The next process that lent itself to repeatability was the recording and transcription procedure. The final factor that speaks to reliability is that of inter-rater analysis and the associated consensus achieving process.

Data Gathering Procedures

The researcher interviewed participants by phone and audio-recorded each interview. The interviews were semi-structured, included open-ended questions, and lasted approximately one hour each. The questions explored the perceptions of the virtual worker participants related to the behaviors of their leaders. Prior to and during the interviews, consent to interview and record the session was requested, and participants were reminded that their participation was completely voluntary and that they could withdraw from the interview at any time with no repercussions.

Data Analysis Process

Immediately following each interview, the recorded session was transcribed using HyperTranscribe, and interview information was redacted to remove any reference to names of people, organizations, and projects. Once the redacted transcript of the recorded interview was complete, the recording was destroyed. When all of the interviews and transcriptions were completed, the researcher and peer reviewer examined and analyzed the transcripts. The responses of the participants to the interview questions were categorized in terms of leadership behaviors. In addition, the behaviors were categorized in terms of the five areas that define success in the virtual workspace: employee productivity, employee retention, employee attendance, employee development, and employee promotions. For example, a response such as “I am less likely to remain with this organization when my leader refuses to listen to my ideas for innovation” would be categorized as a negative behavior under the heading of employee retention. Similarly, a response such as “I am more likely to remain with this organization when I my leader rewards me with an out-of-cycle bonus for a task well done” would be categorized as

a positive behavior under the heading of employee retention. Table 5 illustrates the conceptual approach for categorizing interview responses.

Table 5
Sample Interview Response Structure

	Employee Productivity	Employee Retention	Employee Attendance	Employee Development	Employee Promotions
Positive Behaviors		“I am more likely to remain with this organization when I my leader rewards me with an out-of-cycle bonus for a task well done”			
Negative Behaviors		“I am less likely to remain with this organization when my leader refuses to listen to my ideas for innovation”			

The process for categorizing the responses was repeated for the responses of each participant. Note, the identity of each participant was coded with the numbers one through 17 in order to maintain confidentiality. The file containing participant identity and corresponding participant number has been encrypted on a thumb drive and stored in a safe. Following each interview, the participant code was entered into the HyperTranscribe file, and responses and comments were entered a HyperResearch study file via interface with HyperTranscribe files. The responses of each participant comprised a case within the HyperResearch study file. Hence, the HyperResearch study filed contained 17 cases.

Interview responses were coded and related codes were placed into groups. The groups and associated codes are contained in Appendix E. Each code within the HyperResearch study file contained the responses for all of the participants concerning that particular code. For example, all participant comments related to behaviors associated with micro-management as it

affects productivity are included in the Micro-management Code under the Leadership Behaviors – Productivity Group.

Both the researcher and a peer reviewer with subject matter expertise in organizational leadership independently categorized the responses. The results of the independent reviewer were compared with that of the researcher, and where differences were identified, discussions took place to resolve discrepancies and reach consensus. Creswell offers guidance regarding this process by stating, “it [validity] is based on determining whether the findings are accurate from the standpoint of the researcher, the participant, or other readers of an account...” (Creswell, 2009, p. 191).

Institutional Review Board (IRB) Approval

This study was approved and conducted in accordance with the Pepperdine University IRB considerations for respect for human subjects (Appendix F). In concert with Cone and Foster (2006) guidance, study procedures included the following elements of disclosure: description and purpose of the study, the logistics of the interview, latitude for voluntary participation and option to withdraw, confidentiality, point of contact information, and signatory blocks.

Interface with the study participants was based on their voluntary participation and their consent to be audio recorded. The participants were informed of: their right to withdraw from the study at any time with no repercussions, that their names would be coded in published research findings, and that identity data associated with their interviews would be fully protected. Glatthorn and Joyner (2005) underscore the importance of openness with the subjects as it relates to fully describing interview participation and the recording thereof.

In as much as the identity of each participant was confidential, the risk associated with participation in this study was minimal. Further reducing the risk was the procedure of transcribing the interview and redacting any specific reference to the identity of the participant, the company for whom the participant works, or the person for whom the participant works. Immediately following the interview, the researcher transcribed the interview into a HyperTranscribe file. The audiotape of the interview was destroyed immediately following the transcription process. Prior to and during the interviews, the participants were informed and assured of confidentiality, and the security processes related with the audio and any other associated electronic files. All identity files associated with this research were encrypted and will be saved for a 3 year period, with the exception of the audio file, which was destroyed once the interview transcribed had been transcribed.

Overall, risks for participants in the study were minimal, that is to say, not greater than risks of routine daily activity. In addition, the process for protecting information was secure, and no special classes of individuals were involved (i.e. pregnant women, fetuses, prisoners, children, or mental health patients). Research participants are not identifiable since audio files were destroyed immediately following transcription, and transcribed interview files contain no references to names of participants, their leadership, or the companies for whom they work. This study fell into the classification of exempt review (Pepperdine University, n.d.).

Summary

This chapter covered the methodology for this study, which employed a qualitative phenomenological study and exploration of the perceptions of virtual employees concerning the behaviors of their leaders in a virtual organization. Participants were drawn from a professional IT association of federal employees and federal contractors in California using tenure of virtual

work (participants must have had at least one year experience working virtually at least three days per week), location (worked in California), and field experience (worked in the field of IT for industry or government) as selection criteria. The study employed a semi-structured interview process with the research participants, and used a procedure of inter-coder review by the researcher and a doctoral colleague to ensure validity. A total of 17 telephonic participant interviews were audio-recorded, transcribed, and summarily analyzed. Chapter 4 highlights the findings of the research and Chapter 5 offers conclusions, recommendations, and implications for the future.

Chapter 4: Findings

Introduction

Through a phenomenological qualitative study, this research was designed to explore and offer insights into leadership behaviors, from the vantage point of virtual workers, that positively or negatively influence the success of a virtual organization. The significance of this topic rests in the fact that leadership behaviors play a central role in defining the success of a virtual organization (Society for Human Resource Management, 2010). Using an analysis of research that defines the successful virtual organization as one that maintains metrics that are equal to or exceed in-office environments, this study examines leadership behaviors from the vantage point of virtual workers. These behaviors add to or detract from the success of the virtual organization in the context of a) employee productivity (Robertson & Vink, 2012), b) retention (Cole, 2012), c) attendance (Sharit, et al., 2009), d) professional development (Malhotra, et al., 2007), and e) job promotions (Mulki, et al., 2009). Hence, the purpose of this study is to examine the perceptions of virtual workers concerning which leadership behaviors positively or negatively impact the five factors that define a successful virtual organization (productivity, retention, attendance, professional development, and opportunity for promotion).

This chapter describes the sample population, the process by which information was collected and analyzed, specific findings and themes, and a summary of overall findings. The analysis was performed by examining the responses to each of the interview questions, beginning with demographics and descriptive statistics, and continuing through the interview comments.

Sample Population

The sample population for this study was limited to IT professionals who work in the public or private sectors of the Federal IT contracting community in California. Participants

were drawn from a professional trade association, the American Council for Technology (ACT) and Industry Advisory Council (IAC) Pacific. The ACT IAC Pacific membership is comprised of government and industry professionals in California who work collaboratively to promote communication across government and industry in the area of IT. Participation was limited to those who work virtually at least three days per week and have done so for at least one year. Consistent with Roberts' (2010) guidance concerning sample selection, invitation to participate in this research was by way of an email request (Appendix B) from the researcher to the ACT IAC Pacific via its email roster. The email list included 550 names, email addresses, and phone numbers of current and prospective members.

The email request included a statement that indicated: participation in the research is voluntary, the participation and answers to the study questions by individual participants are confidential, a stipulation that the participant willingly agrees to participate in the study, and that the survey results will be used to increase the body of knowledge concerning the perceptions of leadership behaviors by employees who work in a virtual setting. Drawing from the subset of responses that met the criteria of this study, the first 15 individuals who responded were invited to participate. As the interview scheduling process progressed, a number of participants indicated that they had schedule conflicts. Hence, several additional participants were invited to participate to ensure that at least 15 would be interviewed. Following their selection, the researcher contacted the participants by phone or email to establish rapport, ensure each participant met the criteria for participation in the study, and review the process, parameters, and purpose of the study. A total of 17 participants were interviewed and included in the analysis of the research.

Data Collection Process

Prior to the interview process, the participants received and signed an Informed Consent Form (Appendix C). This form contained a description and purpose of the study, details concerning audio recording and confidentiality of the interview, and the option to withdraw from the study at any time during the interview. In addition, the researcher scheduled each interview and sent each participant a copy of the interview questions (Appendix A).

The qualitative research for this study was conducted via telephonic interviews, each lasting approximately one hour. For more than 30 years, using telephone interviews has become more prevalent and is preferred when: social cues and visual context are not inherently important to the analysis of information, access to participants is limited due to worksites such as residential or governmental locations, or when a specific site for the interview is not required (Irvine, 2011; Opdenakker, 2006). As such, the 17 interviews were conducted telephonically for approximately one hour each.

Each interview commenced with the researcher using a script that introduced the study (Appendix F) and reviewed the highlights of the Informed Consent Form (Appendix C). At the start of each interview, participants were reminded that they were being recorded and that the recordings would be destroyed after they had been transcribed. In addition, immediately following the interviews, the researcher personally transcribed each of the audio recordings using HyperTranscribe, and redacted all references to names of people, organizations, and employer programs.

Data Analysis Process

After the researcher transcribed the audio recordings using HyperTranscribe, the HyperTranscribe files were opened in HyperResearch and the textual responses of the

participants were analyzed, reviewed, and coded into a HyperResearch study file. The researcher revisited the coding process four times – first with a view of the data top-down (i.e. from the interviews to the codes). The second pass examined each coded entry to ensure the code was appropriate. The third iteration included a cross group analysis for similarities and differences among the groups, and the final pass through the data was with an eye to themes. The analysis/review/coding process resulted in eight groups having a total of 58 codes (Appendix E).

The HyperResearch tool offered analytics concerning the frequency with which each code, within each group, was referenced throughout the interview source files. These frequency figures were used to determine which leadership behaviors were referenced most within each group, giving rise to the identification of themes.

Five of the eight groups related one-to-one with the five research questions. That is to say, each group addressed one of the five major indicators of a successful virtual organization; productivity, retention, attendance, development, and promotions. The remaining three coded groups centered on, the participants' general perceptions of working virtually (Interview Question E), the participants' general perceptions of virtual leaders (Interview Question #11), and the participants' perceptions of the success of their organizations (Interview Question F). The description of the analysis and findings for each of these groups as well as the demographics of the participants follows in the remaining sections of this chapter.

Concurrent with the researcher's coding efforts, the interviews were independently analyzed by a doctoral colleague/peer reviewer. The use of a peer reviewer, in addition to the researcher, provided for inter-rater reliability to support the validity of the study as described by Roberts (2010). The independent reviewer coded and analyzed the data. Then the results of the independent reviewer and the researcher were compared by exchanging files. Both the

researcher and the reviewer made annotations as necessary to prepare for a telephonic meeting where similarities and differences were discussed. With respect to identifying groups, the researcher and peer reviewer were aligned. As it relates to the individual codes, there were differences in the wording and code titles, but not in the essence of the codes. In the few cases where there were real differences in the coding, consensus discussions brought changes that were acceptable to both the reviewer and the researcher. Consensus was achieved primarily by referencing the participant comments as well as the frequency of each code.

Demographics

The demographic information contained in Table 6 was derived from questions A through C of the interview questions. The data represents a balance of government and industry participation. While the data indicate that approximately one third of the participants was female, 31% of the mailing list was populated by women, which indicated an overall proportional response from females. All of the responses concerning average length of time on the current job, average length of time working virtually, and average length of time working for the same leader indicated substantial tenure which lent additional credence to the interviews.

Table 6
Demographic Information for Research Participants

Number of participants		17
Participant view of working virtually		
Number with a primarily positive view of virtual work		8
Number with a mixed view of virtual work		8
Number with a negative view of virtual work		1
Government / Industry participants		
Government employee participants		8
Industry employee participants		9
Participants by gender		
Female participants		6
Male participants		11
Average length of time on current job	(Interview Question A)	5.75 years
Average length of time working virtually	(Interview Question B)	6.91 years
Average length of time working for the same leader	(Interview Question C)	2.78 years

Participants' General Perceptions of Working Virtually

Interview Question E asked participants to provide their perceptions of working virtually. Approximately one-half of the participants found virtual work to be a positive experience, and almost one-half of the participants had a mixed/balanced opinion of the experience. More specifically, the areas most often cited as positive by participants when working virtually included -

- Flexibility and freedom to work where and when they wanted,
- Improved health and well-being due to reduced stress,
- Cost savings in terms of commute and clothing.

While the areas most often cited as negative when working virtually included -

- Challenges with time management and focus,
- Losing the boundary between work and personal life – working too many hours,
- Isolation.

Participants' General Perceptions of Virtual Leaders

Aside from their perceptions of leadership behaviors in the defined areas of research in this study (productivity, retention, attendance, development, and promotions), the participants also answered a final question (Interview Question #11) that gave them the opportunity to address other leadership behaviors that are particularly helpful or harmful to them. As a result of this question, three areas came to light. The first is that virtual leaders need to formally assess the readiness of potential virtual workers to ensure that “non performers” do not become part of the virtual workforce. Participant #7 spoke to this in the following manner,

In our organization, assessment is very important so that a low performer is not put in a telework position. Good performance indicates a strong work ethic, which indicates they

take pride in what they do. Non-performers do not fit the profile to be a candidate for virtual work.

This is consistent with Walker's (2010) assertion that employee eligibility to work virtually should be based on an assessment of the employee's willingness and ability to work virtually.

The second area is that virtual leaders need to receive specialized training in virtual leadership to develop leadership behaviors that drive success for the virtual organization. Cascio and Shurygailo (2003) stress that formal training for leaders should include social cues in an anonymous environment, social protocol, and common culture values. Cascio and Shurygailo (2003) also underscore that these leaders must evolve to new level of collaboration, socialization, and communication since all three support the virtual leaders' ability to better inspire and motivate a virtual team. Participant #14 addressed this issue in the following statement.

If leaders have never led virtual workers perhaps training focused on leading the virtual worker in terms of such things as communication and motivation and encouragement [is needed]. The virtual leader needs to really understand each virtual worker as an individual to better understand what drives him or her, and to better understand how to lead that individual. Feedback is far more critical in the virtual environment than in the visible office. Developing relationships is different in the virtual organization where you know people electronically. Communication and messaging needs to be handled differently in the virtual construct since so much can be read into the email, particularly if you haven't taken the time to get to know the virtual employee. Learning how to support virtual employees is different than the office employee - staging interaction has to occur since the leader and virtual employee don't have the luxury of chatting when they pass in the hall. Planned outreach is critical.

The final area is that of the need for more leadership in a virtual organization, not less.

According to Participant #8,

I think virtual leaders think the virtual worker works independently and therefore needs less leadership. Virtual leaders really need to lead more because their people are isolated. Without question, virtual leaders should work harder towards defining deliverables and metrics and what needs to be accomplished - there is more of a need to coordinate communication to make it regular. So I think virtual leaders need to lead more. When

you're in the office, passing each other forces interaction and discussion and dialogue. This isn't forced when you are only connected electronically because you are out of sight and out of mind.

While Participant #9 stated, “Virtual leaders don't lead at the same level as they did, or provide the same level of guidance and conversation as they do for those working in the office”. This is consistent with the literature, which indicates leaders cannot lead in the same manner for collocated and virtual employees. In fact, virtual projects and employees are more likely to fail if leaders employ the same leadership traits at the same levels for the virtual workforce that they use for co-located employees (Walker, 2010).

Participants' Perceptions of the Success of Their Organizations

By way of Interview Question F, participants were also asked about how they viewed the success of their organization. All participants who found working virtually to be an overall positive experience viewed their organizations as being successful. The majority of those participants having a mixed opinion of working virtually defined their organizations as being somewhat successful. There was only one participant who found virtual work to be an overall negative experience and also saw his organization as being somewhat successful.

Themes by Research Areas

The themes that evolved in the course of analyzing the participant interviews aligned with the five primary research areas. These areas are virtual employee productivity, retention, attendance, development, and promotions. The following themes emerged from the interviews with participants.

Five dominant themes emerged concerning leadership behaviors that affect productivity of virtual workers -

1. Virtual leaders exert a positive influence on productivity through concern and interest for virtual workers as individuals.
2. Virtual leaders exert a positive influence on productivity through trust.
3. Virtual leaders exert a positive influence on productivity by empowering virtual workers to work autonomously.
4. Virtual leaders negatively impact productivity through infrequent and unclear communication.
5. Virtual leaders negatively impact productivity through micro-management.

The following two themes appeared concerning leadership behaviors that affect the retention of virtual workers -

1. Virtual leaders exert a positive influence on retention through positive feedback and recognition.
2. Virtual leaders exert a negative influence on retention through a lack of respect for virtual workers as individuals.

The following themes emerged concerning leadership behaviors that affect the attendance of virtual workers -

1. Virtual leaders exert a positive influence on attendance through work assignments that are interesting, skill appropriate, and purposeful.
2. Virtual leaders exert a negative influence on attendance through demotivating behaviors such as inappropriate comments, boring staff meetings, and a negative attitude.

Themes concerning leadership behaviors that affect the professional and personal development of virtual workers are -

1. Virtual leaders exert a positive influence on the development of virtual employees by actively encouraging their development through training, leadership, and certification programs.
2. Virtual leaders exert a negative influence on the development of virtual employees by being reluctant to counsel, plan for, and approve training.

Two themes emerged concerning leadership behaviors that affect promotions of virtual workers -

1. Virtual leaders exert a positive influence on the promotions of virtual employees by mentoring and assigning enriching and visible projects.
2. Virtual leaders exert a negative influence on the promotions of virtual employees by not coaching or providing visibility for them.

Relationship between Research and Interview Questions

Research for this study was centered around five research questions and ten related interview questions. The relationship between the research and the interview questions is shown in Table 7. Specifically with respect to the five research areas that characterize a successful virtual organization, the questions are oriented to finding specific leadership behaviors that virtual employees believe affect their productivity, retention, attendance, development, and promotions.

Table 7
Research and Related Interview Questions

Research Questions	Related Interview Questions
1. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee productivity?	1. What does your leader do that causes you to be more productive? 2. What does your leader do that makes you less productive?

(table continues)

Research Questions	Related Interview Questions
3. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee attendance?	3. What does your leader do that makes you want to work on any given day? 4. What does your leader do that makes you want to take the day off?
4. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee development?	5. What does your leader do that supports your professional and/or personal development? 6. What does your leader do that is an obstacle to your professional and/or personal development?
5. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee promotions?	7. What does your leader do that positions you for a promotion? 8. What does your leader do that keeps you from getting promoted?

The paragraphs below align the purpose of each interview question with the associated research question. These paragraphs also serve to introduce the themes that emerged from the participant interviews in the context of related comments and insights from the participants. The structure below includes each research question and associated interview question, followed by the related themes and interview comments. The intent is to tie together the questions, themes, and interview comments.

Research Question 1. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee productivity? The following two open-ended interview questions address this research question.

Interview Question 1. What does your leader do that causes you to be more productive? The purpose of Question 1 was to draw out specific behaviors of leaders of virtual workers that specifically enhance productivity. The leadership behavior that garnered the greatest number of comments by the participants was that of concern and interest in them as individuals. In fact,

there were a total of 22 comments concerning this aspect of leadership behavior. Another leadership area that participants referred to some 17 times was that of trust. In addition, throughout most all of the research areas, participants consistently cited leadership behaviors concerning empowerment and autonomy as having a positive influence on their productivity. Comments concerning the specific leadership behaviors related to concern and interest, as well as trust and autonomy are presented below.

Concern and Interest in the Individual Virtual Worker. Participants repeatedly referenced concern and interest in them as individuals as the primary leadership behavioral area related to making them more productive. Selecting and training leaders to adapt to the virtual work environment requires engaging leadership to relate effectively on a human level (Chronos Consulting, 2011). Fjermestad (2009) defines the leadership challenge as one that relies heavily on the ability to affect new attitudes and behaviors of team building within the workgroup without the benefit of face-to-face interface. According to Morello and Burton (2006), leadership needs to have a relationship with employees that is interdependent, and where leadership respects the individuality of virtual employees.

Approximately half of the participants in this study spoke to the importance of their leaders behaving in a way that demonstrated that they were valued and important. Many went on to cite the challenge of being “out of sight and out of mind”, such that when their leaders took the time to call and talk with them on a personal level they felt more important to the organization and, as a result, were more productive. Of particular note in the comments below is the need for empathy. Goleman (2006) asserts that leaders in general must relate to their employees in a socially intelligent manner that provides effectiveness about and in relationships and through empathy where empathy takes the form of being aware of the feelings of others,

sharing the feelings of others, and responding with a sense of understanding. Consistent with the research, participants offered the following thoughts related to their leadership having concern and interest in them.

Now, my two prior virtual leaders were very interpersonal, asking about me and my family - they were inspirational by way of letting me know how much they appreciated my efforts. They would call me frequently with words of recognition and ask me how I was doing - very conscious of my well-being. I really enjoyed working for these two leaders. They respected me and knew I had a lot to contribute and literally sought me out for opinions and ideas. In fact they would come to me for insights rather than staff members who were collocated. These leaders were very personable leaders, which is very motivating in a virtual environment. (Participant #9)

It seems in a virtual situation, leaders can easily ignore the people who work for them. I don't like to be treated this way. Bottom line is I believe my leader is not self-aware and doesn't realize how he comes across. So much of this comes with the lack of leadership training - or leadership training that does not include the concepts of self-leadership. My leader needs to respect my capabilities, strengths, and weaknesses and listen to my unique and differing opinions. (Participant #13)

My leader lives by the motto - family first - she is always understanding and believes that life will move on beyond - there will be times when my baby is sick or I'm sick and that I will need time off to take care of family. And she made sure I had coverage for my work when I suffered a family loss. This kind of a personal touch goes a long, long way. I had just the opposite experience with a former virtual leader who called me just three days after my first child was born to tell me that my work was starting to slip and I needed to get focused on my job again. (Participant #15)

An open door policy through phone or electronics is important - and even when he is stressed about something, he will put that out of his mind and talk with me on a personal level. Or sometimes he will note the stress in my voice and ask if I am OK. This kind of leadership keeps communication open. Knowing that he cares goes a long way to keep me productive at a time when I otherwise might not have been on task or even engaged. He has a wonderful ability to empathize with me. (Participant #16)

Building and Maintaining Trust. During the interviews, leadership behaviors surrounding trust were a frequent subject of commentary concerning the productivity of the participants. Consistent with these interviews, studies indicate a leader's trust is positively related to virtual team performance (Joshi et al., 2009). Clemons and Kroth (2011), assert that

trust is the force within a virtual organization that creates and maintains a sense of cohesiveness in the work environment and is core to relationships. In fact, in the virtual organization, trust can be termed a form of social capital, a capital more valuable than financial capital (Clemons & Kroth, 2011). In 2003, when approximately 20% of the workforce participated in some form of telework, Cascio & Shurygailo studied 29 virtual workforce teams and found that leaders of teams with the highest levels of trust were the most productive. Overall, research indicates that trust is positively related to virtual team performance and is integral to motivating virtual teams (Joshi et al., 2009). Participants indicated they perceived an increase in levels of trust when their leaders saw them as individuals as opposed to employee numbers. Participant #13 stated, “What is needed is trust. I will work hard if I feel respected and trusted”. Other participants in this study offered the following thoughts related to the positive impact trust has on their productivity.

By asking questions, by being direct, by not beating around the bush with answers, being candid in a response even though I may not like the response - being open in a response - this promotes trust since I know I will get honest responses in our communication. (Participant #1)

There was good communication and trust in place that made it [the working relationship] successful. So often the interface depends on the character and preferences of the leader and how much they trust folks when they can't see them. So much of this comes down to trust that goes beyond the virtual work policies that are put in place. (Participant #7)

But sometimes I wonder if he trusts that I am working since he routinely sends me messages at the end of the work day maybe just to see if I am still working. In a case like this he is acting more like an old school supervisor rather than a leader; thinking that his role is only to watch me and make sure I work. (Participant #17)

Autonomy. While interviewing participants, the topic of autonomy and the feeling of freedom that comes with it was referenced during two interview questions. The first instance was associated with the question that solicited a general opinion of working virtually.

Consistently, the concept of autonomy was discussed as the primary positive of virtual work.

The second instance was associated with the first interview question concerning productivity. There were a total of 34 participant comments relating to autonomy and yielded insight into leadership behaviors that positively impact productivity. Specific comments include the following.

Being empowered to work virtually, is a way my leader shows trust in me to perform and be productive and do the right things. Being empowered makes me more productive. When my leader tells me to pick my hours to whatever fits, and make things happen, I feel empowered and autonomous and trusted, and as a result, more productive. (Participant #3)

The leadership behavior that is more productive for me is certainly delegating and empowering me with the authority to execute, and trusting me to make good decisions, and stepping in to correct only as is necessary. He gives me the freedom to do what I want to do - such as if I want to do some marketing and help with programs. He encourages me to go toward what my interests are. That makes me feel more motivated to be more productive. He really is supportive and I like that. (Participant #7)

My leader does not micro-manage me and he supports me in what I try to accomplish. He is really hands-off. He trusts that I will do my job the way it needs to be done. He doesn't question what I do or why I do it or tell me what to do. (Participant #8)

The comments from participants were consistent with the work of Gajendran and Harrison (2007), which analyzed 46 studies of 12,883 employees. Their analysis identified autonomy as a pivotal element in the organizational benefit derived from virtual work.

Interview Question 2. What does your leader do that makes you less productive? The purpose of Question 2 was to draw out specific behaviors of leaders of virtual workers that specifically detract from productivity.

Communication. Interestingly, participants pointed to the area of communication as the single greatest detractor from productivity. Not that communication, in and of itself is bad, but many of the behaviors of the participant's leaders were described as negative by form. Some 46 comments concerning problems with leadership communication surfaced in the course of the

interviews. Most participants indicated that communication needed to be frequent (daily), and preferably voice-to-voice with electronic messaging only as necessary. However, participants were quick to point out that when leaders called at the end of the workday, participants perceived this as checking up on them and saw this as a lack of trust on the part of the leader.

Consistent with participant interviews is the analysis by Cascio and Shurygailo (2003) which underscores that leaders must evolve to new level of collaboration, socialization, and communication since all three support the leaders' ability to better inspire and motivate a virtual team. A representative sample of participant interview comments follows.

Untimely or incomplete communications affect the overall quality of my work and my productivity. [My leader] not being available or around affects my productivity as well – he doesn't call back in a timely manner - his cell phone is not on and cannot be reached. Then there's the issue of not being noticed, out of sight out of mind so that you have to put your hand up and scream to be heard. (Participant #1)

Sometimes there are behaviors that irk me, like not responding to emails in a reasonable amount of time. This means that I have to follow-up with phone calls that take up my time. But this is not something that makes me want to quit - it more affects my overall productivity. (Participant #2)

I think there is often a lack of communication - we have weekly reviews but they are lacking in substance - I don't think we often feel like a team. I think there's not team building or consensus building. We haven't gotten together as a team in more than a year now. So physically we are not together doing one thing. I think the behavior of team building is lacking. So while we are meeting our goals, it's not necessarily that we work really well together in a virtual environment. (Participant #3)

We have weekly phone calls but there are a lot of things that don't make it into a call. There are so many other things going on that you get distracted. So we want them [the weekly phone calls] to move along - get everybody up to speed as to where you are at, and get back to work. When you don't see people regularly the requirement for a more details occurs. I would also say that I have recommended using technology to a greater extent, both video for the staff meetings and things that give us wider bandwidth - though these recommendations have not been adopted. My desire would be for him to be more communicative. Oftentimes, I experience decision by no decision. So when I ask him for a decision on xyz, he won't give me a decision. So I am left to make decisions on my own that he may or may not agree with - so I will tell him when the time comes "your decision was this, based on the fact that you didn't give me a decision or say anything".

(Participant #5)

The extended workforce can be as productive as the on premise workforce if you are willing to engage them. The fact that I have to play catch up in trying to find out what is going when I should have been part of the initial conversation on issues makes me less productive and contribute less than I other would have. (Participant #9)

Above all, I wish my leader wouldn't forget he has a phone and that he can take advantage of video as well. Personally, I prefer phone interface because I do like to talk and I like for my leader to pick up the phone and call me. For me emails and echats are just not good enough. (Participant #13)

I need to get quick answers and solutions to problems. Virtually it is usually hard to track someone down to get a response. Sometimes things seem to go into a black hole. I work on time sensitive issues and this impacts my efficiency. It takes a little longer sometimes to get things accomplished. (Participant #15)

Autocratic Leadership and Micro-management. There were some 26 instances where participants spoke to decreased productivity due to leadership behaviors in the form of micro-management on the part of their leaders. Micro-management was consistently cited as a serious deterrent to productivity as it inhibited creative thought, and oftentimes took the virtual worker in a different direction costing considerable time, and having a decidedly negative impact on productivity. Fisher and Fisher (2001) note that virtual workers dislike leadership traits that reflect a transactional style including micro-management and the lack of needed communication. Specific comments from the participants include the following.

I think you can motivate people and demotivate people to an extent but their innate desire and understanding of the job will drive the majority of how their own productivity is and how it is measured. If you pick somebody who is really going to do a good job anyway - it doesn't matter - unless you micromanage them, then they are just not going to be a good employee. (Participant #5)

I have had a virtual leader that led me in just the opposite way and made me less productive by being a micro-manager and not supporting me within the broader organization. I can recall a time when I was being pushed to show higher sales but tied my hands by confining my approach to sales which supported other competing organizations under the heading of being product agnostic - but yet I was being measured on the sales of my specific product. (Participant #8)

The ones [virtual leaders] who have negatively impacted my productivity are the ones who have gotten too deeply involved and watered down my approaches. Because they were not able to delegate appropriately to me, and didn't really understand what I was trying to do, they actually undermined my efforts. For example, when I take it upon myself to initiate authoring a white paper for a client, it is frowned upon - however, if that same white paper is assigned by my leader then it is ok. Essentially, they were more autocratic leaders lacking in the confidence to allow me to do my job without interference and micro-management. Perhaps this is because they are remote from me and my clients - but in reality see me as being in the hinterland and therefore need to be controlled. (Participant #10)

My leader has a tendency to see things only his way and through his own eyes. He tends to be controlling and petty. He has a set way of doing things and is not open to considering other new or innovative way of approaching our organizational challenges. This becomes a very controlling thing and it's either his way or no way. He simply wants me to see things the way he sees things. It would be nice if he were at least open to listening. In addition he can be very petty. There are many things that he nit-picks when he should be looking at the bigger picture. Editing my slides in a way that offers no net improvement is petty and controlling. My leader is more autocratic and micro managing, which I don't think fits in a virtual organization. What is needed is trust and an openness to new and creative ideas. I can see where there is more micro-management in our virtual organization than in the office setting. (Participant #13)

What makes me less productive is having him check on me, whether it's micro-managing it causes me to question his belief in my confidence. I have been doing this work for a long enough time to know what needs to be done and not be micro-managed and watched over like a hawk. Sometimes he becomes overly passionate and anxious about the organization and when he gets a little worked up and has to be told to calm down and directly question his motives for being overly micro managing. (Participant #16)

Research Question 2. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee retention?

Interview Question 3. What does your leader do that makes you want to stay in the organization? The purpose of this question was to explore specific behaviors of leaders of virtual workers that specifically influence retaining virtual employees.

Positive Feedback and Recognition. According to participants, receiving feedback and recognition is integral to a decision to remain with their organizations. In fact, in the view of the

participants, receiving input concerning positive performance is essential to feeling valued by their leader and being a valuable contributor to the success of the organization. Literature in the area of virtual work indicates that one of the most often overlooked elements of positive leadership in virtual teams is feedback to individual team members in the form of effective and consistent appraisals (Leonard, 2011). Leonard (2011) contends that feedback and recognition make virtual employees feel important to the organization and further reinforces a sense of connection to the organization. Since virtual employees do not have the benefit of frequent face-to-face interaction with leadership, feedback and recognition underscore to the virtual employee that he/she is a valued member of the team (Leonard, 2011). The following comments from research participants further illustrate the role of feedback and recognition in the retention of virtual employees.

The leadership behavior that makes me want to stay is that my leader cares about me and appreciates what I do and me. Time and time again he is amazed at the quality of my work. For example, I identified a huge business opportunity - really big dollars - by doing extraordinary research and pursued the opportunity through meetings and teleconferences. The feedback came through as a big WOW. (Participant #4)

I am thinking of the awesome amount of praise I received last week when I closed a large deal and he sent a email to virtually the whole company and a whole bunch of emails poured in from my colleagues congratulating me. That was outstanding - and I'm happy he did that - I really appreciate that. (Participant #6)

One of the things my leader is good at is making me understand the work I do is important. She respects the work I do and really thanks me for my efforts - is an ongoing going message that I am doing important things that she acknowledges and that she is appreciative. I think that helps me want to stay with the organization. There is an emotional part of this that when I feel appreciated I want to stay. (Participant #9)

Part of the impetus to stay comes from clients who send in letters of thanks and recognition - and then my leader sends the letter up the management chain. So as long as I'm getting some form of positive affirmation it makes me feel good and it makes me want to remain in this organization. (Participant # 13)

Interview Question 4. What does your leader do that makes you want to leave the organization? The purpose of this question was to explore specific behaviors of leaders of virtual workers that specifically influence virtual employees to leave an organization.

Lack of Respect. During the interviews, lack of respect of virtual leaders evidenced itself in a number of ways. For example, Participant #4 indicates that retention is negatively impacted, “When my leader screams and is flying off the handle at me”. Similarly, Participant #14 offers, “I had a virtual job where the boss was a screamer. It was horrible - he would scream at everyone. It was such wretched work environment that I really couldn't function”.

This type of leadership is both directive and transactional by form and can lead to a hostile work environment. Bass (1990) describes this as both counterproductive and ineffective. Somewhat akin to directive leadership, transactional leadership is aversive and focuses on problematic employees, (Sims et al., 2008). According to Morello and Burton (2006) leadership needs to have relationships with employees that are symbiotic in nature. Morello and Burton (2006) posit concerning organizations of 2015 and beyond, that leadership needs to see employees as individuals and give up the command and control mentality. Additionally, they assert organizations with a control mentality are doomed (Morello & Burton, 2006).

In addition to the comments above, other participant interviews offer the following insights and examples of leadership behavior that negatively impact retention of virtual employees.

When my leader was dishonest with me - he did not demonstrate integrity. Also there has been a lack of trust that created an environment by excluding me from certain meetings and discussions - so I ask if I belong here. (Participant #1)

Now there have been a lot of moments I've wanted to leave the organization. I have thought of how I may not belong and that I made a bad decision to join this organization. These situations range from difficult conversations with my leader to business deals that

have died on me. I can't imagine I'm the only person who has felt this way. Times are difficult economically in the organization and my leader gives me a lot of grief about how I handled a particular situation with a client that has been almost impossible to satisfy. I felt my leader went overboard by beating me up. I am stressed beyond all belief and have to listen to all of the negative comments. (Participant #6)

Sometimes my leader sends action items to me a mile a minute - without taking any time to thank and recognize me for what I'm doing - even to ask me how I am doing and make me feel appreciated. It's like he takes me for granted. (Participant #8)

When he is undermining me I ask myself why am I persisting in this? It would be something where I am in a meeting, I start to contribute, and my ideas are shot down - then after the meeting, my leader calls to tell me I need to contribute more in meetings. (Participant #10)

For example, if he asks me a question in the midst of an open conference call, and he thinks I am giving too much detail - he cuts me off. These are the moments when I say - do I need this? This is not only rude but embarrassing as well. (Participant #13)

Research Question 3. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee attendance? The following two open-ended interview questions address this research question.

Interview Question 5. What does your leader do that makes you want to work on any given day? The purpose of this question was to explore specific behaviors of leaders of virtual workers that serve as a positive influence on attendance of virtual employees.

Interesting Work Assignments. For many of the participants, coming to work each day is a function of how interesting, skill appropriate, and purposeful the work is for them. For example, Participant #16 stated, “If I am working on a project that excites me, I really want to get up and work on it”. For Participant #12 it simply comes down to, “What makes me want to work on any given day is knowing that I have a full day's worth of work”. Other comments include the following statements.

For me, it's having an assignment that I am prepared or able to do. It happens when the tasking he gives me aligns with what I am capable of doing – not too far beyond or below

my abilities. (Participant #1)

I like his seeking my opinion on things. It helps to give me a greater sense of purpose and adds meaning to what I do. I like to see my thoughts and ideas show up on our website or in our organizational papers. (Participant #17)

I think, her giving me a task or project to work on and allowing me to do it, and respecting the work I've done is why I want to come to work. I will give my leader credit there are projects that she has given me that she has been very supportive of. She is also open to my suggestions of projects. If I come forward with an initiative and she is very supportive of that - this makes it worth working each day. (Participant #9)

Interview Question 6. What does your leader do that makes you want to take the day off? The purpose of this question was to explore specific behaviors of leaders of virtual workers that negatively impact attendance of virtual employees.

Leadership that Demotivates. The following leadership behaviors demotivate to the extent that virtual workers are more likely to take days off. The topic of long and pointless meetings appears to have this affect and is captured in a statement by Participant #3, “There are the days that we have the weekly review that is kind of a waste of my time. So every Tuesday I wake up and say oh, no - it's that day, it's Tuesday”. Participant #7 offered thoughts along the same lines with, “When I know I will have to participate in endless meetings that are poorly managed and of little consequence, it makes for a day that I do not want to go to work”.

Participant #9 was most succinct with, “Usually on staff meeting day, I'd rather take the day off”.

Additional comments include the following.

I don't feel like my leader motivates me - my motivation is self-driven. I can't think of a time where he really fired me up and so that I couldn't wait for Monday morning. My weekly reviews with him are on Mondays and if anything, I dread Mondays and get headaches and get moody on Sunday nights - I have been really working on getting that under control and put into perspective what it is - my leader doing his job. (Participant #6)

I find sometimes that I wish from an age standpoint he was more of a peer. I have encouraged him to not sugarcoat my performance, but by the same token not to intimate

'why didn't you think of that, stupid'; and not to reprimand me for not thinking like him. I am stressed beyond all belief and have to listen to all of the negative comments. (Participant #6)

What makes me not want to work on any given day is when I think my leader is not going to have my back and support me, or maybe there has been a miscommunication and I expect her to blow up over a mistake I have made - she is kind of one strike and you are out. (Participant #12)

Research Question 4. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee development? The following two open-ended interview questions address this research question.

Interview Question 7. What does your leader do that supports your professional and/or personal development? The purpose of this question was to explore specific behaviors of leaders of virtual workers that serve as a positive influence on the development of virtual employees.

Actively Encouraging Development. Participants shared several comments concerning a number of leadership behaviors in the area of development. Participant #3 stated, “My leader is supportive of my activities with professional associations in terms of attending events, conferences, and symposia”. Participant #7 indicated, “The support in offering opportunities and approving requests for continued education opportunities for training certifications, and skill development is important. My leader provides these opportunities consistently”. While Participant #14 offered, “He is very supportive of it and makes sure I have a development plan and he discusses it with me each year”. These statements are consistent with the literature where Nafukho et al., (2010) assert that leadership must ensure virtual workers have opportunity to grow and thrive through virtual training and online communities of practice.

Additional comments from interview participants on this subject include the following.

For personal development my leader is very supportive of me attending school either online or in person. If I were to tell him I am going to class on these days for these times,

he is fine with that. We also have a tuition assistance program. (Participant #5)

Over time, my virtual leaders were very interested in my development and put me in leadership programs to give me an avenue to professional development and gave me a strong sense of the organization. I feel very fortunate in this regard. Even while I was working on my dissertation, my leader would send me articles that related to my topic. He cared enough to think about me what he read articles that he thought might be of interest and help for me. I would say that I have had very supportive and enabling leaders that put me on the path to success. Even though I was out of sight, my virtual leaders still had me in the front of their minds. They took the time to recognize my talent even though I was not in the office. With the exception of the screamer I worked for, my virtual leadership has really cared about my development and me. (Participant #14)

Interview Question 8. What does your leader do that is an obstacle to your professional and/or personal development? The purpose of this question was to explore specific behaviors of leaders of virtual workers that negatively impact the development of virtual employees.

Reluctance to Train. There was a dominant theme during the interview process that emphasized reluctance on the part of leaders to train virtual employees. Restrictions in financial resources contributed to this in large stead, however, a general hesitancy on the part of leadership to support forward planning in this regard underscored a reluctance to train. In contrast to participant interviews, literature in this area points to a need to provide for career development through training plans that are specifically designed for the virtual worker (Walker, 2010). In fact, results-oriented continuous developmental improvement is critical to the ongoing success of the virtual organization (Fisher & Fisher, 2001). Specifically, participants offered the following comments.

There have been a couple of areas of professional development where I can find things that I needed to know and places where I can learn - and basically was told - no - we don't want to go there. On the professional side, my leader feels that I know what I need to know to do the job and don't need to learn anything else. (Participant #5)

My leadership talks a good talk and tries to act like he means what he says about the importance of training, but it's not executable because of the restrictions on finances. In fact we have a full-blown development plan that we can fill out. It sounds great and

looks great but the fact is that it has no teeth to it or meaning or value. (Participant #8)

My leadership does not take an active role in my development. While the company advocates that the leader have a couple of discussions about development each year; that never happens because other business issues always come first. Though my older counterparts aren't as interested in professional development, this is an important issue for me as I have several decades left in the workforce and I need to keep abreast of what's new and evolving in technology. There are many areas where I would like to grow and develop and it hasn't been happening. (Participant #15)

Overall we can't travel for training. He could be more supportive if he would go up the leadership chain and be an advocate. And since there are far less opportunities for local training, I don't get as much training as I would like. (Participant #17)

Research Question 5. What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee promotions? The following two open-ended interview questions address this research question.

Interview Question 9. What does your leader do that positions you for a promotion?

The purpose of this question was to explore specific behaviors of leaders of virtual workers that support the likelihood of promotions for virtual employees.

Career Enhancing Assignments. For the most part, participant comments concerning positive leadership behaviors about positioning them for promotions were negative by form. However, one theme that emerged consistently addressed quality assignments. In fact, Participant #14 saw assignments themselves as a promotion and stated, “For me a promotion is getting a wonderful assignment that will make me grow professionally in terms of knowledge, not necessarily in terms of title or salary”. In addition, Participant #17 offered, “My leader does try to give me a few projects that might help me stretch and grow professionally - like training others, and public speaking spots”. Additional comments include the following.

One thing is that he has asked me to write a job description for the next level. He is very supportive and I don't think he is doing anything that would stand in my way of a promotion. So I definitely see a future that has the possibility of promotion for me.

(Participant #2)

My virtual leader gives me the opportunity to do assignments in other areas that give me both experience as well as exposure to other leaders in the company. It is important that I am not bottled into just one little area. It's important to try on different hats to see where my other strengths and preferences may lie. (Participant #15)

Interview Question 10. What does your leader do that is an obstacle to your professional and/or personal development? The purpose of this question was to explore specific behaviors of leaders of virtual workers that inhibit the possibilities for promotions of virtual employees.

Lack of Mentoring and Visibility. Literature indicates that leadership that cares about virtual employees creates an environment that is receptive to upward mobility in the organization (Clemons & Kroth, 2011). However, the lack of professional development is a huge cause of concern among virtual workers as they can easily be passed over for training and promotion since they lack corporate visibility (Walker, 2010). In fact, interview participants indicated they were being held back from promotions because their leadership did not coach or provide them up-line visibility. Specific interview comments include the following statements.

With my leader, promotion possibilities are not even discussed. Also, being located on the west coast provides additional drawbacks - promotions are not prevalent on the west coast, so in order to get promoted I would have to relocate. In a nutshell - my leader ignores the topic of promotions. (Participant #13)

My leader does not initiate discussions about promotions - not even in terms of what I need to do to get promoted. I would have to say, "OK, I want to have a career discussion; or OK I want to have a promotion analysis". Working virtually keeps me out of sight and out of mind - it's hard to be noticed and to get promoted. I have to a long way above and beyond. This is because I am not regularly seen at headquarters. There is a perception that since I am not seen during the day I do not bring as much value to the organization. So I am seen in terms of steady state performance - it's difficult to demonstrate that you are promotable even with outstanding performance. Now I do get a performance review - but careers and promotions are not discussed. The leadership behavior is one that is not proactive for my career. (Participant #1)

I am in a culture that requires a strong chain of command dynamic - so it is very difficult to gain notoriety or approvals from those up the line - this keeps them out of the know, it also keeps me from becoming more well-known. (Participant #8)

One thing that is such a challenge is other people in decision-making positions that don't know you exist. Many times when an opportunity for high visibility occurs, my leader will take someone who works in the office with her. Not having my name out there and that I exist limits my opportunities to be recognized as someone who should be considered for promotion. So when my name comes up as having applied for a promotion - it's like, who is this guy? So I have to rely on my leader to get my name out there as the go-to person in my area. I don't believe this is happening. She won't keep me from applying for a promotion, but not endorsing me is the real obstacle. Basically she is not mentoring or grooming me for a promotion. (Participant #9)

It often comes down to whether my leader comes to bat for me. Last August, for example, my leader was unable to influence decision makers to support my organization for long-term growth. For example, I had an employee who was applying for a prestigious program that would have positioned her for promotion. Unfortunately, my leader did not support her in the decision-making sessions and so she was denied approval. Since I work out of the headquarters area - I am negatively affected. He talks the talk and says he cares about those located in another area, but in reality, his actions do not support me being promoted. Overall, it seems that my leader refuses to see any long-term growth in my position. (Participant #10)

Summary of Findings for Research Questions

The relationship between the research questions, the interview questions, the interview themes, and the leadership behaviors is illustrated in Tables 8 through 12. The far left column of each table contains the research questions. A column containing the interview questions related to the research question follows next. The third column contains the themes that were derived from the answers to the interview questions, and the final column includes specific leadership behaviors related to each of the themes.

Table 8 delineates specific positive leadership behaviors that impact the productivity of virtual employees with respect to the themes of care and concern for employees, trust, and autonomy/empowerment. For example, some of the specific leadership behaviors related to these themes include: humanizing the relationship with virtual employees by taking the time to

inquire about their well-being, the well-being of their families, their interests, their plans for the future; the leadership behaviors also include trusting virtual workers by sharing organizational information that goes beyond corporate newsletters with an emphasis on the meaning and context of the information; and by making assignments with only general direction and not telling employees specifically how to do their jobs. Participants who experienced positive leadership behaviors indicated that these behaviors provided an impetus for them to be more productive on a day-to-day basis and also to be more creative and innovative in their approach to project assignments.

Additionally, Table 8 addresses specific negative leadership behaviors that can adversely impact the productivity of virtual employees with respect to the themes of unclear and infrequent communication as well as micro-management. For example, negative behaviors include using electronic communication in lieu of voice-to-voice communication, demonstrating a reluctance to interface via voice-to-voice contact; showing a lack of trust by requiring employees to document every action taken they take and all work performed; and considering the use of surveillance as a means of supervising virtual employees. All told, these behaviors have an adverse impact on the productivity of the virtual organization. Consistent feedback from participants in the research contained references to being perceived by their leadership as untrustworthy. As a result, a number of participants mentioned a reluctance to veer off a prescribed path of doing exactly what their leadership directed. Hence, rarely would these participants make attempts at innovating a process or leveraging opportunities for the organization. Consequently, the best the organization could expect in a situation such as this is mediocre performance.

Table 8

Questions, Themes, and Leadership Behaviors for Research Question 1

Research Question 1	Interview Questions	Themes	Leadership Behaviors
What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee productivity?	1. What does your leader do that causes you to be more productive?	<p>1. Virtual leaders exert a positive influence on productivity through concern and interest for virtual workers as individuals.</p> <p>2. Virtual leaders exert a positive influence on productivity through trust.</p> <p>3. Virtual leaders exert a positive influence on productivity by empowering virtual workers to work autonomously.</p> <p>*****</p>	<p>-Reaches out/builds relationships with virtual workers</p> <p>-Inquires about the well-being and families of virtual workers</p> <p>-Humanizes the relationships with virtual workers through casual and friendly conversation</p> <p>-Expressed appreciation</p> <p>-Respects capabilities/strengths</p> <p>-Shares information; provides for a transparent organization by sharing goals and objectives</p> <p>-Provides candid/honest answers</p> <p>Delegates without hovering</p> <p>-Encourages virtual workers to set own hours</p> <p>-Defines expectations/vision and allows virtual workers to decide on approach</p> <p>*****</p>
	2. What does your leader do that makes you less productive?	<p>1. Virtual leaders negatively impact productivity through infrequent and unclear communication.</p> <p>*****</p> <p>2. Virtual leaders negatively impact productivity through micro-management.</p>	<p>-Provides unclear instructions</p> <p>-Is frequently unavailable to interface with virtual employees</p> <p>-Offers untimely responses to requests for support</p> <p>-Conducts content free meetings</p> <p>-Sends vague messages</p> <p>-Uses primarily electronic means to communicate to avoid voice to voice communication</p> <p>-Does not communicate vision, organizational plans</p> <p>-Tells workers how to work</p> <p>-Requires extensive documentation re how the employees spend time</p> <p>-Issues last minute and unexpected assignments – appears unaware or not concerned with what virtual employees are addressing</p> <p>-Calls at the end of the day to check to see if employees are still working.</p> <p>-Suggests the use of a video camera to watch employees</p>

Table 9 delineates specific positive leadership behaviors that impact retention of virtual employees with respect to the theme of feedback and recognition of employees. For example, this includes behaviors that focus on thanking employees for their efforts, and letting them know that their work is important. Table 9 also addresses specific negative leadership behaviors that impact retention of virtual employees relating to a lack of respect for virtual employees. Examples include berating employees, excluding them from meetings where they have a vested interest, and interrupting employees when they are trying to make a point.

Table 9
Questions, Themes, and Leadership Behaviors for Research Question 2

Research Question 2	Interview Questions	Themes	Leadership Behaviors
What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee retention?	3. What does your leader do that makes you want to stay in the organization?	Virtual leaders exert a positive influence on retention through positive feedback and recognition	<ul style="list-style-type: none"> -Praises and recognizes virtual employees -Recognizes employees up the leadership chain -Nominates virtual employees for financial and other awards -Lets virtual employees know that the work they do is important and makes a difference -Tells virtual employees their work is appreciated -Respects the work of employees -Thanks employees for their efforts -Provides high level visibility
	4. What does your leader do that makes you want to leave the organization?	Virtual leaders exert a negative influence on retention through a lack of respect for virtual workers as individuals.	<ul style="list-style-type: none"> -Cuts employees off -Shoots down the ideas of employees publically -Excludes employees from important meetings -Takes credit for employees' work -Undermines employees efforts to sell an idea -Embarrasses employees by denigrating their ideas -Treats virtual employees like robots -Lies or is dishonest with virtual employees

Table 10 delineates specific positive leadership behaviors that impact attendance of virtual employees with respect to a theme of assigning work that is interesting, skill appropriate, and purposeful. Examples of these behaviors include being aware of current workload for each virtual employee, offering project assignments that are visible throughout the organization, and seeking innovative input for future projects. Table 10 also addresses specific negative leadership behaviors that impact attendance of virtual employees. These relate to demotivating actions towards virtual employees. Examples include conducting long-winded, content-free, and boring meetings; or exhibiting a negative attitude towards virtual employees.

Table 10
Questions, Themes, and Leadership Behaviors for Research Question 3

Research Question 3	Interview Questions	Themes	Leadership Behaviors
What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee attendance?	5. What does your leader do that makes you want to work on any given day?	Virtual leaders exert a positive influence on attendance through work assignments that are interesting, skill appropriate, and purposeful.	<ul style="list-style-type: none"> -Assigns work that employees are prepared and capable of performing -Provides sufficient time to complete projects -Is aware of current workload of employees and makes assignments accordingly -Offers project assignments that are exciting and create visibility for employees -Seeks creative input concerning assignments and allows employees to proceed by giving them space
	6. What does your leader do that makes you want to take the day off?	Virtual leaders exert a negative influence on attendance through demotivating behaviors such as inappropriate comments, boring staff meetings, and a negative attitude.	<ul style="list-style-type: none"> -Issues assignments far above or below employee capabilities -Conducts poorly managed, long drawn out meetings -Projects a nit-picking or negative/emotional/hostile attitude -Overreacts to mistakes; one strike and you are out

Table 11 prescribes specific positive leadership behaviors that impact the professional and personal development of virtual employees with respect to the theme of actively encouraging

development through training, leadership, and certification programs. Examples of these behaviors include taking the time to explore what developmental programs are of interest to virtual employees, and taking the initiative to work with higher-level leadership to obtain the resources necessary to further develop virtual employees. Table 11 also addresses specific negative leadership behaviors that impact virtual employee development with respect to a theme of reluctance to counsel and train virtual employees. For example, not taking the time to formulate development plans, provide employee appraisals, and execute training plans.

Table 11
Questions, Themes, and Leadership Behaviors for Research Question 4

Research Question 4	Interview Questions	Themes	Leadership Behaviors
What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee development?	7. What does your leader do that supports your professional and/or personal development?	Virtual leaders exert a positive influence on the development of virtual employees by actively encouraging their development through training, leadership, and certification programs.	<ul style="list-style-type: none"> -Acts as a sounding board for developmental options -Nominates virtual employees for leadership training programs -Identifies sources for certification training -Finds alternative approaches when finances -Campaigns with up-line for training finances
	8. What does your leader do that is an obstacle to your professional and/or personal development?	Virtual leaders exert a negative influence on the development of virtual employees by being reluctant to counsel, plan for, and approve training.	<ul style="list-style-type: none"> -Does not follow through on commitments to train -Does not acknowledge importance of training virtual employees; says they should already know what they need to know to do the job -Does not construct development plan for virtual employees -Does not take an active role in the development of virtual employees -If development plans are written for virtual employees, does not execute to the plans -Does not provide annual appraisals -Discontinues leadership programs

Table 12 offers specific positive leadership behaviors that impact promotions for virtual employees with respect to a theme of positioning virtual employees for advancement in their careers. Examples of these behaviors include mentoring virtual employees by drawing out their aspirations, creating visible assignments, and campaigning for their advancement. Table 12 also addresses specific negative leadership behaviors that create obstacles to the promotions of virtual employees. Examples of this type of leadership behavior include avoiding career discussions with virtual employees, and assigning routine/robotic projects that hinder career advancement.

Table 12
Questions, Themes, and Leadership Behaviors for Research Question 5

Research Question 5	Interview Questions	Themes	Leadership Behaviors
What leadership behaviors most positively and negatively affect the success of a virtual workforce in terms of employee promotions?	9. What does your leader do that positions you for a promotion?	Virtual leaders exert a positive influence on the promotions of virtual employees by mentoring and assigning enriching and visible projects.	<ul style="list-style-type: none"> -Asks virtual employees about their professional aspirations -Advises and mentors virtual employees towards promotions -Assigns crucial and visible projects -Campaigns and creates visibility for promotions of virtual employees -Accrues funding for promotions -Cross trains virtual employees to broaden their scope of organizational support -Involves virtual employees in creating new positions
	10. What does your leader do that keeps you from getting promoted?	Virtual leaders exert a negative influence on the promotions of virtual employees by not coaching or providing visibility for them.	<ul style="list-style-type: none"> -Ignores virtual employees when it comes to promotions -Assigns work that is not career enhancing -Avoids discussions concerning promotions -Is reactive rather than proactive to discussions involving upward mobility of virtual employees -Doesn't follow up on commitments to promote

Chapter Summary

Chapter 4 presented the findings of the research. Beginning with a definition of the sample population defined as virtual workers residing in California and involved in the field of IT, the chapter included a description of the data collection and analysis processes. In addition to a summary of the demographics and associated descriptive statistics, perceptions of participants concerning working virtually as well as their perceptions of their leadership were included. Relevant themes were derived from the qualitative interviews, and specific leadership behaviors were identified that positively or negatively impacted the success of the virtual organizations of the participants.

Overall, the interviews brought to light several overarching issues. The first being that virtual leaders need to formally assess the readiness of potential virtual workers to work virtually to ensure that “non performers” do not become part of the virtual workforce. Second, virtual leaders need to receive training in virtual leadership to include courses such as building and facilitating teams in a virtual organization and engendering trust in a virtual space. Third, leaders of virtual organizations need to focus on leading more in the virtual space than they do in a collocated venue.

Additionally, specific themes related to the five defining areas of successful virtual organizations were identified. As it relates to productivity a) virtual leaders exert a positive influence on productivity through concern and interest for virtual workers as individuals, b) virtual leaders exert a positive influence on productivity through trust, c) virtual leaders exert a positive influence on productivity by empowering virtual workers to work autonomously, d) virtual leaders negatively impact productivity through infrequent and unclear communication, and e) virtual leaders negatively impact productivity through micro-management. With respect

to retaining virtual workers a) virtual leaders exert a positive influence on retention through positive feedback and recognition, and b) virtual leaders exert a negative influence on retention through a lack of respect for virtual workers as individuals. Concerning job attendance by virtual employees a) virtual leaders exert a positive influence on attendance through work assignments that are interesting, skill appropriate, and purposeful, and b) virtual leaders exert a negative influence on attendance through demotivating behaviors such as inappropriate comments, boring staff meetings, and a negative attitude. In regards to professional and personal development a) virtual leaders exert a positive influence on the development of virtual employees by actively encouraging their development through training, leadership, and certification programs, b) virtual leaders exert a negative influence on the development of virtual employees by being reluctant to counsel, plan for, and approve training. With respect to promotions for virtual employees a) virtual leaders exert a positive influence on the promotions of virtual employees by mentoring and assigning enriching and visible projects, and b) virtual leaders exert a negative influence on the promotions of virtual employees by not coaching or providing visibility for them. In sum, the participant interviews revealed the themes and specific leadership behaviors that impact virtual workers. The themes offered insight into leadership areas that can have the strongest impact on the overall success of a virtual organization, and the specific behaviors gave rise to the positive and negative leadership actions that directly impact the productivity, retention, attendance, development, and promotions of virtual workers and subsequent success of their organizations.

Chapter 5 offers conclusions, implications, and recommendations for future research regarding the influence of leadership behaviors on virtual organizations.

Chapter 5: Conclusions, Implications, and Recommendations for Future Research

Introduction

The culture of virtual work has become increasingly rooted over the past 42 years. Economic challenges and technology associated with a global economy have set the stage for a more connected workforce in more disconnected venues. Employees no longer need to be tethered to a desk and chair in a corporate office since work and collaboration can occur from a home office, a client's conference room, and even the beach. Parents can respond to emails while watching their children's soccer games and virtual leaders can reach out to their virtual employees across time zones and geographic corporate boundaries.

However, while the presence of virtual work has become more pervasive, the need to examine the factors that define and impact a successful virtual organization has become increasingly important. For example, in February 2013 Marissa Mayer, CEO at Yahoo, revoked telework options for a number of Yahoo employees (Tkaczyk, 2013). Mayer stated, "people are more productive when they're alone, ... but they're more collaborative and innovative when they're together. Some of the best ideas come from pulling two different ideas together" (Tkaczyk, 2013, para. 6). Overall, the policy change affected some 200 employees out of the 12,000 employed by the company. Nonetheless, the announcement created a flurry as to whether telework was in decline. Fundamentally, the issue comes down to making virtual organizations successful. Offstein and Morwick addressed the issue most succinctly by stating, "Leadership makes telework, work" (2009, p. xvii). And according to SHRM, "Effective leadership is the number one factor that influences success in a virtual organization" (2010, p. 1).

Hence, the need to focus on leadership and the components of a successful virtual organization are important. To this end, a review of the literature included in Chapter 2,

indicated the definition of a successful virtual organization is one that offers metrics greater than or equal to comparable in-office organization in terms of employee productivity, retention, attendance, professional development, and upward mobility. The literature further indicated that frequently virtual organizations fail to meet these criteria. Unfortunately, all too often virtual leaders do not navigate very well through the challenges associated with guiding a virtual workforce, and find their virtual teams do not achieve predetermined metrics and thus are deemed failures (Morris, 2008). In fact, less than half of telework situations succeed due to inexpert leadership (Walinskas, 2012). Moreover, virtual projects and employees are more likely to fail if leaders employ the same leadership traits at the same levels for the virtual workforce that they use for co-located employees (Walker, 2010). Hence, it is imperative that leadership makes adjustments in behaviors to accommodate the distance factors of time and space associated with virtual employees. Though everyone in an organization needs to take some form of ownership for properly defining interaction with the virtual workforce, the majority of the responsibility falls to the leader who must first focus on trust rather than technology (Morris, 2008). Given these insights, the imperative for the leader of a virtual workforce is to first recognize the need to adopt different leadership methods for his/her virtual team.

The Problem, Intent of the Research, and Purpose of the Study

The problem this study addressed is reducing the incidence of failure within virtual organizations by examining the perceptions of virtual employees related to leadership behaviors that positively or negatively affect their work performance in a virtual setting and ultimately the success of their organization. The intent of this research was grounded in the premise that the views of virtual workers can shed light on which leadership behaviors help or hinder the performance of the virtual workforce. To this end, the purpose of this study was to examine the

perceptions of virtual workers concerning which leadership behaviors positively or negatively impact the five factors that define a successful virtual organization (productivity, retention, attendance, professional development, and opportunity for promotion).

Significance

The significance of this study rests in the fact that leadership behaviors play a central role in defining the success of a virtual organization (Society for Human Resource Management, 2010). Lojeski (2010) asserts that with the speed of change, particularly towards the virtual workforce and away from the co-located models of office teams, the quality of leadership and its ability to adapt flexibly to the virtual environment is critical. By and large, the virtual workforce presents a challenge for leadership to adapt to the needs of the virtual worker on an individual and personal level. By examining the perceptions of virtual workers, this study offers insights from those who are most affected by the actions of virtual leaders, and identifies which leadership behaviors most positively or negatively impact the performance of virtual organizations.

Theoretical Framework and Supporting Literature

This study used transformational leadership introduced by Burns in 1978 and expanded on by Bass in 1985 as the theoretical framework for examining leadership behaviors in the context of the virtual workspace. This framework contains a core leadership focus on interpersonal elements and traits such as individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence (Bass & Riggio, 2007; Jogulu & Wood, 2007, p. 37). Coupling the framework of transformational leadership with critical leadership characteristics created an exploratory path for identifying leadership behaviors that impact the success of a virtual organization.

Methodology

This study employed a qualitative research approach that included interviews with 17 participants. The participants were obtained using a mailing list from an IT organization within California and included both industry and government personnel. All of the participants had worked virtually for at least three days per week over the past year. The interviews were each approximately one hour in duration, occurred telephonically, and were audio recorded. Each audio recording was summarily transcribed by the researcher using HyperTranscribe, and was later input to HyperResearch for coding, grouping, and theme analysis by the researcher. A peer reviewer also reviewed the transcripts and coded, grouped, and analyzed the data. All conceptual differences in coding were resolved via consensus discussions between the researcher and the peer reviewer. The interview analysis by the peer reviewer provided for inter-rater reliability and served to mitigate researcher bias.

Key Findings

Overarching Findings and Issues. Several overarching issues came to light in the course of this study. The first issue concerned the need for virtual leaders to formally assess the readiness of potential virtual workers in order to ensure that “non performers” do not become part of the virtual workforce. That is to say, potential virtual workers who are unwilling, unable, or lack an independent self-driven work ethic should not enter the ranks of the virtual workforce. This is consistent with Walker’s (2010) position that, in general, eligibility to work virtually should be based on an employee’s ability and willingness. In addition, the position of Peters et al. (2010) that posits that virtual work comes down to trust in the capabilities of the employees. If employees are assigned to work virtually and do not possess an understanding of what they are expected to do, or they do not have the drive or self-motivation to work in an independent

manner, they are not likely to be as productive as they were in the office and more likely to violate the trust their virtual leaders have placed in them.

The second overarching issue that surfaced in this study indicated that virtual leaders need training in virtual leadership. The core of the issue is that virtual leaders need to learn and understand that leading virtual workers is unique from leading employees who are collocated and within a leader's field of vision. The participants pointed out that they often felt that they were forgotten or were viewed as second-class employees in the minds of their leaders. Even worse, their leadership appeared incredulous about the validity of their work products and the hours they reported having worked. Snyder (2012) asserts there is a need for re-training reluctant management who view telework with skepticism, as this skepticism may create conscious or subconscious reactions that cause virtual organizations to fail. Cascio and Shurygailo (2003) stress that formal training for leaders should also include social cues in an anonymous environment, social protocol, and creating common culture values across a virtual enterprise.

The third and perhaps the most significant and encapsulating of all findings was that leaders of virtual organizations need to focus on leading virtual employees more than they do in-office employees. Participants in this study spoke to the fact that they saw a decline in leadership and interface when they began working as virtual employees. Hence, it is important that virtual leaders make adjustments in their leadership behaviors to accommodate the distance factors of time and space and ramp up their leadership efforts.

Positive Leadership Behaviors. This study found leadership characteristics related to the concern for virtual employees as individuals, trust, empowerment, recognition, purposeful assignments, encouragement to develop and grow, and providing organizational visibility to be most critical to creating a positive and successful virtual organizations. Specific behaviors

included the need for virtual leaders to strive for a one-on-one relationship with their virtual employees by calling to inquire about their families and their well being, and forging conversations concerning common interests. Simply taking the time to ask how the virtual worker is doing can go much further to humanize the relationship between virtual leader and virtual employee than an impersonal email message. This is consistent with Morello and Burton (2006), who assert that leadership needs to have a relationship with employees that is symbiotic in nature, one where leadership sees virtual employees as individuals. Nauman et al. (2009) also postulate that the leadership style in the virtual setting needs to focus on relationship management, concern for each individual worker, and level of empowerment suited to the capability of the employee. In their research, Nauman et al. (2009) found that these leadership characteristics must be practiced to a far greater extent in a virtual environment than in the in-office setting.

Moreover, specific behaviors related to trust and empowerment are linked together. In as much as a leader cannot show trust without empowering the virtual worker, the virtual leader cannot bestow empowerment on the virtual worker without trusting him/her. In contrast, Nilles (2013) points out, “But if the management practices are of an overly *laissez-faire* nature, look for trouble teleworking” (para. 5). Hence, an attitude of trust and empowerment on the part of virtual leaders needs to be in alignment with the capabilities and potential of virtual employees (Peters et al., 2010).

Recognition, purposeful assignments, encouragement to develop and grow, and providing organizational visibility also comprise positive and impactful leadership behaviors. Consistent with Leonard (2010), feedback encourages virtual employees to feel a connection to the organization. Similarly, leaders who remain mindful of the important role virtual workers play

in their organization by providing satisfying assignments and appropriate rewards and recognition, are more likely to retain those employees (Cole, 2012; Solomon, 2000). In addition, formally establishing a protocol for training and development aids in retaining virtual employees and is critical to creating and growing a virtual organization (Walker, 2010).

In sum, the findings of this study, coupled with related literature, accentuate the importance of positive leadership behaviors in virtual organizations. Such behaviors relate to concern for virtual employees as individuals, trust, and empowerment, recognition, purposeful assignments, encouragement to develop and grow, and providing organizational visibility and are critical to the success of virtual organizations.

Negative Leadership Behaviors. In stark contrast to the leadership behaviors that have a positive impact on the success of a virtual organization, the behaviors of virtual leaders that were found to have the most negative effect on virtual organizations included the following: infrequent and unclear communication, micro-management, disrespect for virtual workers, negative attitudes, and a reluctance to counsel and mentor. At both ends of the spectrum were the lack of communication and the need to micro-manage. Infrequent and unclear communication generally took the form of leader-prompted interface that occurred only once per week. Participants noted that the lack of communication from their leaders left them feeling isolated and unnecessary. However, it is interesting to note in a study at Northwestern University researchers found that in a number of cases virtual workers became stressed due to excessive communication from their managers and co-workers (Fonner, 2012). Hence, a balance of communication that keeps virtual workers apprised of the overall activities within the organization without inundating them with messages appears necessary.

The study showed that for the more transactional leaders, virtual leadership behaviors associated with micro-management distractions (i.e. how-to instructions, last minute assignments, and calls/messages to check if the employee was working) occurred numerous times per day. Overall, these behaviors are consistent with Fisher and Fisher (2001) who cite that virtual workers dislike leadership traits that reflect a transactional style including micro-management and the lack of needed communication.

Considering the swath of negative virtual leadership behaviors, findings concerning disrespectful leadership behaviors towards virtual employees, coupled with a general negative attitude, drew considerable commentary from research participants. The behaviors ranged from screaming to rude comments, and left participants considering other employment opportunities. The work of Fisher and Fisher (2001) supports this and offers some insight into what virtual employees desire of leadership in the overall context of offsite work namely, fairness, and respect. Moreover, virtual employees are more likely to remain with an organization when leadership respects them (Fisher & Fisher, 2001).

Finally, the finding concerning reluctance to counsel and mentor virtual employees towards promotions became evident with related behaviors such as assigning low-level work, and avoiding discussions concerning possibilities for advancement. Such behaviors left virtual employees questioning the degree to which their leaders want them on the team. This is consistent with Clemons and Kroth (2011) who posit that leadership that cares about virtual employees creates an environment that is receptive to upward mobility in the organization.

Profiling Effective Virtual Leaders and Virtual Workers. All told, using the findings and issues contained herein coupled with leadership behaviors and participant input regarding their views of working virtually, the following profiles emerged for those who best lead and

follow in the virtual workspace. The more suited candidates for leading and/or working virtually have a profile delineated in Table 13. The less suited candidates are profiled in Table 14.

Table 13

Profile for Leaders and Workers Suited to Lead or Work Virtually

Virtual Leader	Virtual Worker
Is proficient in sharing the organizational vision and providing contextual leadership	Wants to work virtually
Is trusting	Is capable of and enjoys working independently
Is attuned to verbal and written cues	Maintains a strong work/life balance
Is comfortable delegating projects	Is focused
Has well-developed social skills that are equally effective in person, via voice, and in electronic interface	Is self-motivated
Is comfortable working outside of a command and control environment	Is capable of working to and meeting self-directed schedules and project strategies/plans
Solicits opinions	Possesses technical competence re job performance
Is tactful	Delivers on-time, quality work products
Is outward focused versus inward focused	Does not require direct supervision
Is self-aware	Is a strong critical thinker
Is responsive	Is confident in his/her work products
Maintains control of emotions	Appreciates the flexibility of working virtually
Adapts well to change	Is reliable in terms of delivering on what he/she promises
Consistently recognizes and rewards workers	Is flexible and can alter plans for the day to attend to new and exigent requirements
Offers regular feedback, appraisals, and authors and executes employee development plans	Is comfortable reaching out to collaborate using various media appropriate to a given situation
Maintains a social connection with employees that demonstrates interest and concern	Is comfortable with unclear or ambiguous assignments requiring out-of-the-box thinking
Shares information in a transparent manner	Is organized
Makes assignments that are skill and experience appropriate	Is technology savvy
Is clear with project assignments in terms of objectives, deliverables, and milestone dates	
Facilitates collaboration and synergy	
Is open and honest	
Positions employees for advancement	
Uses multiple forms of media to communicate	

Table 14

Profile for Leaders and Workers Not Well-Suited to Lead or Work Virtually

Virtual Leader	Virtual Worker
Has somewhat of a negative attitude	Requires a high level of face-to-face social interaction with leader and co-workers
Is demanding	Needs significant input from leader re assignments
Needs to have total control of his/her organization	Has little experience with the job
Is a poor planner and is prone to issue last minute assignments	Lacks drive and focus
Requires status input at a level of finite detail	Is easily distracted
Views employees as generators of output rather than human resources	Demonstrates difficulty with change
Is reluctant to request support and resources from upper management	Is considered a “non-performer” by colleagues
Is loathe to provide quality assignments to employees who work off-site	Lacks technical savvy to work virtually
Is rude or disrespectful to employees, denigrates others	
Lacks strong communication skills – tends to interrupt	
Tends to hoard information – believing information is power	
Does not believe employees will work and honestly report hours if they are out of the office	
Is not an engaged leader	
Cannot, or does not, clearly articulate expectations of employees	

Both leaders and employees should be assessed before and during assignments as virtual leaders and virtual workers to ensure suitability for their virtual roles. This function can be performed during appraisal cycles or when work products are being evaluated.

Engaging Virtual Workers. Leaders should check-in with virtual employees frequently on a personal level, socialize the team, and encourage them to share personal information, and create mentor-protégé relationships (Mulki et al., 2009). Avenues for this type of engagement include –

- Reaching out to individual virtual workers to find out how they are doing
- Having discussions with individual virtual employees regarding their future aspirations
- Assisting with plans to help virtual workers achieve their professional and personal goals
- Creating an organizational “Facebook” site to help socialize the team.

Leadership can and should engage virtual employees by demonstrating trust (Peters et al., 2010) since trust is more important in virtual organizations than in collocated organizations (Cordery et al., 2009; Zaccaro & Bader, 2003). Leaders might employ the following approaches to engage virtual workers –

- Permitting and encouraging virtual employees to rotate and take the lead in meetings
- Assigning projects to virtual employees that offer visibility up the management chain and into headquarters
- Permitting virtual workers to design and execute projects in an autonomous manner.

Morris (2008) posits that communicating and connecting at the individual level is of paramount importance and can pay handsome dividends in terms of employee engagement and productivity. In fact a leader who is participative may be able to more easily overcome the distance challenge (Avolio & Kahai, 2003). Leader actions that support this approach to engagement include –

- Encouraging an open-door policy of communication as an *open-screen* policy where virtual employees feel free to initiate communication, and where leaders are responsive and given to communicating with employees
- Asking for opinions and ideas where virtual workers come to realize they are making welcomed suggestions to solving organizational challenges
- Advocating and supporting brainstorming via video conferencing to provide a venue for innovation
- Scheduling teleconferences that are content rich where all virtual employees are given a chance to share their thoughts in an environment where their contributions are valued
- Allowing for time during status calls for virtual workers to share their highs and lows of the previous week
- Creating informal chat rooms and communities of practice to engage virtual workers to offer solutions, ideas, and opinions before final project decisions are made.

Leaders should keep virtual employees engaged by offering ongoing feedback and ensuring they feel connected to the organization (Leonard, 2011). This type of engagement can result from actions such as –

- Discussing the meaning and context of activities at headquarters
- Employing individual Skype chats to underscore a personal connection
- Personalizing rewards – flowers, family gift cards for dinner/movie, etc.
- Funding nominal peer-to-peer awards.

Relationship of Leadership Styles and Skills to Findings

Of note, the personal predilections of virtual employees point to generalized traits more often witnessed in the transformational leader, while the dislikes of virtual employees tend to be characteristic of the transactional leader. The work of Fisher and Fisher (2001) offer some insight into what virtual employees desire of leadership in the overall context of offsite work. The authors point out that leadership preferences of virtual employees align with elements of transformational leadership such as concern for development, fairness, and respect. Fisher and Fisher (2001) also cite that virtual workers dislike leadership traits that reflect a transactional style including micro-management and the lack of needed communication.

Table 15 illustrates the alignment between transformational leadership and the findings of this study that speak to behaviors that positively impact the success of a virtual organization. Specifically, the positive leadership themes include: concern for virtual employees as individuals, trust, empowerment, recognition, purposeful assignments, encouragement to develop and grow, and providing organizational visibility. These themes align with: individualized consideration, inspirational motivation, intellectual stimulation, and idealized influence. Table 15 also presents negative leadership themes that impact the success of virtual organizations. Additionally, it demonstrates the misalignment of the themes with transformational leadership. Specifically, these themes include: infrequent and unclear communication, micro-management to the extent of making virtual workers less productive, disrespect during meetings and in front of other employees, poor management and an overall negative attitude that creates a pall over the organization, reluctance to train, and a reluctance to mentor. None of the negative leadership themes align with transformational leadership, are more transactional and directive by form, and serve to minimize the likelihood of creating and sustaining a successful virtual organization.

Table 15
Relationship between Findings and Transformational Leadership

Leadership Themes	Aligns with -	Does not align with
Positive Themes		
Concern for virtual employees as individuals	Individualized Consideration	
Trusting virtual employees	Idealized Influence	
Providing autonomy and empowerment for virtual employees	Intellectual Stimulation and Individualized Consideration	
Recognizing and providing feedback to virtual employees	Inspiration and Motivation	
Assigning purposeful work	Intellectual Stimulation	
Encouragement of virtual employees to develop and grow	Intellectual Stimulation	
Providing organizational visibility to virtual employees	Idealized Influence	
Negative Themes		
Provides unclear and infrequent communication to virtual employees		Inspiration and Motivation and Individualized Consideration
Micro-manages virtual employees		Intellectual Stimulation and Individualized Consideration
Disrespects virtual employees		Idealized Influence
Manages poorly and displays a negative attitude to virtual employees		Idealized Influence
Is reluctant to counsel, and train virtual employees		Intellectual Stimulation
Does not position virtual employees for promotions by not providing visibility or mentoring		Idealized Influence

The framework offered by the construct of transformational leadership is an important anchor for leading virtual organizations. However, a successful virtual leader may invoke several styles as situations warrant. For example, Goleman (2006) offers six styles of leadership; coercive, authoritative, affiliative, democratic, pacesetter, and coaching. Each style can be defined in terms of traits, a positive or negative orientation, and situations.

Coercive leadership takes on a demanding air, is negative by form, but can work well in exigent situations (Goleman, 2006). This style of leadership is more closely aligned with transactional leadership. In contrast, authoritative leadership can be positive in terms of setting a

vision or context. This style can be useful in the early stages of change to serve as a catalyst for the change. The authoritative leader exhibits self-confidence and serves to support the mobilizing requirements for change (Goleman, 2006). In addition, pacesetter leadership can also offer short-term benefits to drive a team to achieve positive results (Goleman, 2006).

Affiliative, democratic, and coaching leadership styles are more aligned with transformational leadership in as much as they are more people oriented, motivational, collaborative, and empathetic with followers (Goleman, 2006).

By and large, the styles offered by Goleman provide insights into situations of tasks versus people. It is incumbent upon the leader to assess the organization. When people are core to the organization, leadership styles that align with transformational leadership show more promise than task-oriented leadership since in a virtual organization, it is all too easy for the leader to lose sight of and objectify employees and the contributions they make to the team; thus creating a situation where employees go unnoticed, and the organization becomes purely task driven (Walker, 2010).

Along with the leadership styles above, the role of contextual leadership in the form of contextual intelligence emerges as a critical factor for identifying and adapting to shifts and changes in governmental, global, demographics, social mores, technology, and labor (Mayo & Nohria, 2005). Contextual leadership is ‘the ability to understand and adapt to changing business conditions [and] is as important as any particular personality trait or competency’ (Mayo & Nohria, 2005, p. 45). Though important in collocated organizations, the need to employ contextual leadership in the virtual workspace is a greater given the challenges associated with geography, time zones, hands-on operations, and human interaction. More important is engaging virtual workers by setting the vision of the organization within the context of the evolving

business and operational landscape (Mayo & Nohria, 2005). This begins with defining the path-forward for the team in terms of goals and expectations, and articulating where the organization needs to go; that is to say beginning with the end in mind. It requires the ability to connect the ultimate goals of the organization with the business context and the influences at work that drive an organization. From leaders such as Christopher Columbus to Walt Disney, Steve Jobs, Bill Gates, and Elon Musk, their visions were defined and shared in order to engage followers to understand the goal at hand within the context of political and social forces. Whether the vision was finding a new route to the east, creating the consummate customer experience, developing the newest consumer electronic product, or attempting to redefine the automobile, contextual leadership and intelligence was at the core. Contextual leadership is crucial in engaging employees and orienting them to the purpose, goals, and challenges of the organization.

In addition to leadership styles, it is also important to consider leadership skills. The Katz Model offers one such approach and is rooted in human, technical, and conceptual skills (Katz, 1955). The Katz model emphasizes the learned approach to leadership and goes beyond leadership styles or traits. Fundamentally, the model addresses three levels of management (supervisory, managerial, and top level) across three skill domains where the skill level for each domain (technical, human, and conceptual) varies depending on the level of management (Katz, 1955). The model indicates that as individuals move up the management hierarchy: the need for technical skills and expertise lessens; the need for human skill remains consistently high; and the requirement for conceptual skill increases beyond the supervisory level and remains high for both middle and top management. The import of the Katz model is that it informs an interesting connection to leadership in virtual organizations.

In the virtual workspace, the need for technical skill on the part of both the virtual leader and the virtual employee goes without saying, since virtual organizations could not function without the technology. Additionally, conceptual skills for both the virtual leader and virtual employee are pervasive in the knowledge-based virtual organizations that dominate the virtual workspace. Though the use of and need for technical and conceptual skills in leadership is axiomatic in both co-located and virtual environments, however, the human factor in virtual organizations draws particular attention.

Of note is the connection between the Katz model with respect to human skill and the leadership trait of individualized consideration resident in the transformational leadership style of Bass. Northouse (2010, p. 61) states, “Being a leader with human skills means being sensitive to the needs and motivations of others and taking into account others’ needs in one’s decision making”. The research in this dissertation, underscores the necessity of human concern as it relates to and impacts levels of productivity in the virtual environment. Combining the qualitative research in this study with the human skill element of the Katz model, as well as transformational, affiliative, democratic, and coaching leadership styles accentuates the importance of the human connection in leadership. And given the fact that virtual workers are physically removed from their leaders, the need to focus on human interface becomes all the greater. As a result, leaders in a virtual venue need to offer more by way of employee-oriented leadership than leaders who are co-located with their employees.

Limitations

Type of Work. The research of this study was limited to professionals in knowledge-based technology positions associated with IT. Hence, other fields and professions were not represented.

Geographical Boundaries. Research with participants was limited to the state of California. By using the mailing list for the ACT IAC Pacific, this research was confined to participants residing in California. Most of potential participants on the mail list work for IT organizations in California and have reporting lines to the East Coast. Hence many of the participants commented on challenges of being far removed from their respective headquarters.

Participants. Participants were limited to virtual employees. Individuals who were in-office leaders of virtual employees were not included. In only a few cases were the participants both virtual employees and virtual leaders. For these participants, only their comments concerning their experiences as virtual employees were considered and included in this study.

Recommendations for Further Research

Examine both Leaders and Followers. Further research into the area of virtual leadership could include a study of group(s) of virtual employees along with their respective leaders. This research construct could be used to determine the extent to which individuals and their virtual employees are in agreement concerning leadership behaviors that are most beneficial to the success of their virtual organizations. This approach might also provide for determining possible correlations between leader/follower expectation and preferences in the virtual workspace.

Employ a Quantitative or Mixed Methods Approach. The use of a quantitative approach, or one that employs a mixed methods research design could be considered for future research. In fact, a mixed methods design that incorporates a statistical analysis as well as qualitative interviews with open-ended questions could provide insights that exceed the boundaries of this dissertation. Such approaches could consider if positive or negative leadership behaviors have the greater impact on the success of the virtual workforce.

Expand Research Beyond California. Supplementary research might also be nationwide or global by form and incorporate the influence of regional and/or cultural predilections. Discerning best practices of other geographic areas might offer insights into improving the productivity, retention, attendance, development, and upward mobility for geographically dispersed virtual workers.

Expand Research Beyond the Field of IT. Additional research could expand the participant base to include virtual employees from professional areas beyond IT. It could also address non-knowledge based areas of employment such as miscellaneous product sales, order taking, and in-home product assembly.

Examine Sample Populations Based on Gender, Generation, Educational Background, and Experience. Future research could also address perceptual differences in virtual leadership behaviors from different sample populations based on gender, age/generation, educational background, and experience levels. For example, given the volumes of research on Millennials, it is conceivable that the virtual leadership behaviors best suited for the Baby-boomer generation are unlike those best suited for Millennials. Nafukho et al. (2010) allude to the fact that Millennials have a preference for working in a virtual environment, are the fastest growing group of professionals, and are expected to work well in a virtual environment. Hence, additional research addressing this group may offer important information related to virtual leadership of the future.

Implications for the Future

While the projections for the increase in the virtual workforce worldwide vary widely, virtually all accounts anticipate strong and continued growth trends. Most notably, the number of virtual workers is expected to grow to 1.3 billion within the next several years (Johns, &

Gratton, 2013). As it is with many change initiatives, a migration to a virtual work environment carries with it a certain amount of disruption. Part of the disruption falls to leadership who will need to make decided changes in the way they lead; namely the manner in which they lead their *invisible* employees.

Ultimately, the future of successful virtual organizations rests on a reorientation of leadership towards a transformational style. This will require a virtual leadership style that anchors itself on individualized consideration, and humanizes virtual employees beyond the role of automatons; a style that cares for and has concern for virtual employees as individuals. It will require a focus on intellectual stimulation in the form of ongoing development with work assignments that allow virtual workers to stretch and grow. It will require charismatic leaders to exercise more idealized influence as well as inspiration and motivation towards virtual employees than they do towards workers who work down the hall. A transition to virtual transformational leadership will set the stage for more successful virtual organizations in the future.

The following conclusions offer methods for current and future leadership to remain cognizant of the importance of the virtual workforce and move forward in the quest for successful virtual organizations that perform better than brick and mortar counterparts. It is the hope of this researcher that the ideas and recommendations contained herein set the stage for leaders to improve their leadership behaviors for virtual employees and therefore improve their odds of creating and maintaining successful virtual organizations.

Conclusions

Through qualitative phenomenological research into the lived experiences of 17 virtual workers, this dissertation examined the positive and negative behaviors of virtual leaders that

impact the success of virtual organizations. The interviews of the 17 participants offered some 454 comments concerning positive and negative virtual leadership behaviors. The interviews produced 13 themes that covered five areas that are indicative of a successful virtual organization. In total, there were five themes associated with the area of virtual employee productivity in virtual organizations, and two themes each for the remaining four areas (retention, attendance, development, promotions).

Overall, the study contained herein brought to light the need for leadership training focused specifically on leaders of virtual organizations. It also sent a message that virtual leaders need to lead their virtual workers more than they lead their in-office employees and ensure that they conduct formal assessments to determine which personnel can perform effectively in a virtual environment. Finally, this study captured specific leadership behaviors inherently necessary for virtual leadership as a combination of behaviors that focus on human concern, trust, empowerment, recognition, and mentoring of virtual employees.

Conclusion 1 – Virtual Leaders Need to Lead More, Not Less. A future characterized by virtual organizations that significantly out-perform their brick and mortar counterparts is conceivable in the context of leadership behaviors that serve to improve virtual employee productivity, retention, attendance, development, and upward mobility. Leaders who are trained to appropriately influence virtual employees through specific virtual leadership behaviors can dramatically improve the performance of virtual employees as well as the overall success of their organizations. Virtual leadership training that emphasizes an increase in leadership for virtual employees can assure these employees that they are an integral part of important organizations.

Conclusion 2 – Leaders Can Improve Fiscal Performance of their Virtual Organizations through Behaviors that Accentuate Human Interaction and Trust.

Specifically, leaders can redefine the success rate of virtual organizations and create a positive impact on the fiscal results of their organizations by changing their leadership behaviors. By altering and improving leadership behaviors in the areas of human concern and trust in their virtual employees, leaders can mitigate the ill effects of micro-management and create a positive impact on the overall productivity of their virtual employees.

Conclusion 3 – Leadership Behaviors Associated with Recognizing, Mentoring, and Counseling Virtual Employees are Catalysts to Improved Organizational Success. Perhaps most importantly, leaders who mentor and counsel their virtual employees create a springboard for organizational success. These are the virtual leaders who recognize virtual employees. These are the leaders who ensure their virtual workers have assignments that are purposeful. These are the leaders who aren't afraid to leverage the visibility of their virtual employees and position them for growth within the organization. A leader who mentors virtual employees toward success in these ways, in fact, mentors the entire organization towards success.

Summary Statement. So, what does it take to successfully lead a virtual organization? It takes leadership actions that reflect a deep and genuine interest in the virtual employees, as well as an effective level of communication across all types of media. It requires trust and the willingness to empower all members of the team and provide them with meaningful work assignments. It takes recognition and rewards, and a plan to take employees to greater heights through training and promotions. Virtual leaders with a flexible leadership style, well-honed human, conceptual, and technical skills, and a sense of contextual intelligence have what it takes to successfully lead a virtual organization.

In sum, the message to the reader is that without increased leadership on the part of those who manage virtual employees, the likelihood of success diminishes. Simply put: virtual leaders

need to be trained to lead virtual organizations, they need to lead more rather than less, and they need to employ behaviors that ignite a spirit of commitment, and performance on the part of virtual employees. In the most succinct words, "Leadership makes telework work" (Offstein & Morwick, 2009, p. xvii).

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APPENDIX A: Interview Questions

Each participant in this research will be asked a series of open-ended questions concerning leadership behaviors in his/her organization. In the following questions, the term “leader” refers to the person to whom the participant directly reports. Each participant will be asked to answer the questions in terms of specific examples of behaviors exhibited by his or her leader.

General Questions

- A. How long have you been in your current job?
- B. How long have you been working virtually?
- C. Have you worked for the same leader the entire time of you have been in this job?
- D. If not please describe timeframes and transitions.
- E. Describe your overall perception of working virtually. Include the positives and the challenges.
- F. How would you describe the overall success of your organization?

Specific Questions Relating back to the Research Questions

6. What does your leader do that causes you to be more productive?
7. What does your leader do that makes you less productive?
8. What does your leader do that makes you want to stay in the organization?
9. What does your leader do that makes you want to leave the organization?
10. What does your leader do that makes you want to work on any given day?
11. What does your leader do that makes you want to take the day off?
12. What does your leader do that supports your professional and/or personal development?
13. What does your leader do that is an obstacle to your professional and/or personal development?

14. What does your leader do that positions you for a promotion?
15. What does your leader do that keeps you from getting promoted?
16. Are there any other leadership behaviors that you would like to cite that are particularly helpful or harmful?

APPENDIX B: eMail Letter to Potential Research Participant

Dear Potential Research Participant:

I am enrolled in a doctoral program in Organizational Leadership at Pepperdine University. Having completed all course requirements for my degree, I am now working on my dissertation and associated research. My research is in partial fulfillment of the requirements for this dissertation. The purpose of my research is to examine the perceptions of virtual employees (i.e. teleworkers) concerning the behaviors of their leader that affect their job performance.

Please note that as a participant in this research, your participation will be confidential and under no circumstances will your identity be revealed in the dissertation.

Your participation in this research will take the form of a one-hour phone interview that will be audio recorded. Immediately following the interview, I will transcribe the interview ensuring that any inadvertent references during the interview to your name, the name of your leader, or the name of your company/organization will be redacted. Following the transcription process, the audio file of your interview will be destroyed.

During the interview you will be asked to identify behaviors of your leader that positively or negatively affect your performance in the context of productivity, desire to remain on the job, attendance, professional development, and promotion possibilities. Please understand, that you are not required to answer every question, that your participation is voluntary, and that you may decide at any time to withdrawal from the research at your discretion.

Please contact me within the next week to let me know that you are willing to participate in this research. Thank you, in advance, for assisting me I this endeavor.

Respectfully,
Ann Gladys

APPENDIX C: Consent for Research Study

“A Phenomenological Study of the Lived Experiences of Employees Who Work Virtually and Their Perceptions of Leadership Behaviors that Create a Successful Virtual Organization”

I _____, agree to participate in the research study being conducted by Anna Mae Gladys under the direction of Dr. June Schmieder.

The purpose of this research study is to examine the perceptions of virtual employees concerning leadership behaviors that positively and negatively affect their performance in a virtual work environment. Using an analysis of research that defines the successful virtual organization as one that maintains metrics that are equal to or exceed in-office environments, this study examines leadership behaviors from the vantage point of virtual workers, which add to or detract from the success of the virtual organization in the context of employee productivity, retention, attendance, professional development, and job promotions. Hence, the overall goal of this study is to examine the perceptions of virtual workers concerning which leadership behaviors positively or negatively impact the five factors that define a successful virtual organization (productivity, retention, attendance, professional development, and opportunity for promotion). The objective of this study is to obtain and share insights into specific leadership behaviors that support virtual organizations such that the virtual workforce of the future will experience sustainable success.

This research involves a one-hour telephone interview that will be audio recorded.

There is no compensation or compensatory benefits associated with participation in this study.

Please note that participation in this research is voluntary; refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. Please understand that you may discontinue participation at any time without penalty or loss of benefits to which you are otherwise entitled.

Confidentiality is provided for the participant in as much as the interview is audio recorded, not video recorded and is conducted via phone; hence the participant cannot be visually identified. Additionally, during the interview, participants are

not referred to by name; nor will interviewer refer to the name of the participant’s leader or the name of the participant’s company/organization. Each participant is also cautioned to not refer to his/her leader or company/organization by name.

Immediately following the interview, the researcher will transcribe the audio file. If there have been any inadvertent references to the name of the participant, his/her leader’s name, or the name of the participant’s company/organization, these references will be redacted such that the redacted transcribed file will contain no information that can identify the participant.

The transcribed file will not be named to track back to the participant and upon completion of each transcript the associated audio file will be destroyed.

Hence, this research presents no known or potential risk to the participants since the information obtained cannot be tracked back to the individual participants either by name or by identifiers. In as much as this interview is confidential, there are no risks or discomfort associated with your role in the research. Should you decide to withdraw from the research, merely notify before or during the interview process.

Thank you, in advance, for your participation in this research. Your willingness to assist with this study may bring new findings to the arena of leadership behaviors in the virtual workspace and offer ideas for increased success for virtual organizations.

If you have follow-on questions concerning this research, please feel free to contact me.

I have explained and defined in detail the research procedure in which the subject has consented to participate.

_____	_____
Principal Investigator	Date
_____	_____
Research Participant	Date

CC: Research Participant

APPENDIX D: Nondisclosure and Review Form for Inter-rater Peer Reviewer

Reviewer will protect the information related to participant interview data and the review associated therewith for the dissertation entitled *A Phenomenological Study of the Lived Experiences of Employees Who Work Virtually and Their Perceptions of Leadership Behaviors that Create a Successful Virtual Organization*. To this end, the reviewer will not use, share, divulge, or discuss the interview data with anyone other than the researcher. Though the interview file only contains redacted information and participant codes, this form provides for an additional level of confidentiality.

(Reviewer Signature)

Coding of Participant Interview Files

The reviewer has read, analyzed, coded, and discussed his/her independent review of the interview data with the researcher. _____ (Reviewer Initials)

The reviewer has completed consensus discussions with the researcher and is in agreement with the final analysis and findings. _____ (Reviewer Initials)

APPENDIX E: Study Groups and Codes

Groups	Codes
Leadership Behaviors - Attendance	Appreciation
	Boring Meetings and Assignments
	Micro-management v autonomy
	Motivation
	Rudeness - emotional
	Support and Responsiveness
Leadership Behaviors - Development	Active v Inactive Role in Development
	Advocacy
	Encouragement
	Reluctance to Train
	Training
Leadership Behaviors - General	Assessments
	Inexperience - Training Virtual Leaders
	Need to Lead More
Leadership Behaviors - Productivity	Assigning Meaningful Work
	Autocratic and Other Styles
	Autonomy and Empowerment
	Benefits and Perks
	Care and concern for employees
	Communication
	Distractions
	Expectations and Vision
	Extra Hours
	Feedback and Recognition
	Flexible
	Infrastructure
	Micro-management
	Motivational and Charismatic
	Political
	Self-starter
	Team Facilitation
	Trust

Leadership Behaviors - Promotions	
	Assignments
	Being Noticed / Recognition
	Mentoring and Visibility
	Metrics
	Supportiveness
Leadership Behaviors - Retention	
	Clarity
	Control v Freedom
	Diversity
	Emotional Outbursts
	Flexible Hours
	Honesty
	Inclusiveness
	Interface and Communication
	Purpose
	Recognition and Being Valued
	Scheduling
	Support
Organizational Observations	
	Organizational Success
Pluses and Minuses of Working Virtually	
	Family
	Financial
	Flexibility and Freedom
	Health and Well-being
	Interruptions - Distractions
	Isolation
	Overall Opinion
	Self-motivation
	Time Management and Overtime

APPENDIX F: IRB Approval

PEPPERDINE UNIVERSITY

Graduate School of Education and Psychology

Graduate & Professional Schools Institutional Review Board

January 16, 2014

Anna Mae Gladys

Protocol #: E1113D02

Project Title: A Phenomenological Study of the Lived Experiences of Employees Who Work Virtually and Their Perceptions of Leadership Behaviors that Create a Successful Virtual Organization.

Dear Ms. Gladys:

Thank you for submitting your application, (GPS IRB). The IRB appreciates the work you and your faculty advisor Dr. June Schmieder have done on the proposal A Phenomenological Study of the Lived Experiences of Employees Who Work Virtually and Their Perceptions of Leadership Behaviors that Create a Successful Virtual Organization. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations (45 CFR 46 - <http://www.nihtraining.com/ohsrsite/guidelines/45cfr46.html>) that govern the protections of human subjects. Specifically, section 45 CFR 46.101(b)(2) states:

(b) Unless otherwise required by Department or Agency heads, research activities in which the only involvement of human subjects will be in one or more of the following categories are exempt from this policy:

Category (2) of 45 CFR 46.101, research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior, unless: a) Information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; and b) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit a **Request for Modification Form** to the GPS IRB. Because your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the GPS IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite our best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the GPS IRB as soon as possible. We will ask for a complete explanation of the event and your response. Other actions also may be required

depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the GPS IRB and the appropriate form to be used to report this information can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* (see link to “policy material” at <http://www.pepperdine.edu/irb/graduate/>). Please refer to the protocol number denoted above in all further communication or correspondence related to this approval. Should you have additional questions, please contact Kevin Collins, Manager of Institutional Review Board (IRB) at gpsirb@peppderdine.edu. On behalf of the GPS IRB, I wish you success in this scholarly pursuit.

Sincerely,

(Signature on original)

Thema Bryant-Davis, Ph.D.
Chair, Graduate and Professional Schools IRB

cc: Dr. Lee Kats, Vice Provost for Research and Strategic Initiatives
Ms. Alexandra Roosa, Director Research and Sponsored Programs
Dr. June Schmieder, Faculty Advisor

APPENDIX G: Interview Script

Interview Protocol Script

1. Each interview is performed by phone for a period of approximately one hour.
2. At the onset of the phone conversation, the researcher thanks the participant for his/her support of the research effort and reviews the Informed Consent Form with the participant. The researcher also introduces and summarizes the research project and emphasizes that the interview questions focus on specific leadership behaviors. Specifically, the researcher focuses on the differences between characteristics and behaviors by offering examples such as; generosity is a characteristic, while donating \$10,000 annually to Pepperdine University is a behavior.
3. Interviews are semi-structured to include pre-identified research questions (contained in Appendix A) and follow-up questions to provide additional clarity to initial answers.
4. Interviews are audio-recorded.
5. Audio recordings are transcribed. Any references to names of participants, their leaders, or organizations are redacted in the transcription.
6. Audio recordings are destroyed following transcription.
7. Transcripts contain no personal or identifying information.
8. Transcripts are key coded with personal identifying information (names, emails, phone numbers) and the key code file is encrypted on a thumb drive and stored in a safe in the researchers home for three years.
9. At the conclusion of each interview, the participant is thanked by the researcher for his/her time, insights, and support.