

Leadership for a New World

11 Case Studies in Remote and Hybrid
Work

Center for Hybrid and Virtual
Organizations

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Editor

Melody Rawlings

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Center for Hybrid and Virtual Organizations

National University's Center for Hybrid and Virtual Organizations (CHVO) is a leading authority on hybrid and virtual learning and work environments, connecting research, practice, and innovation to shape the future of education and workforce success. CHVO also provides leadership development training to equip organizations with the strategies and skills needed to effectively lead hybrid and remote teams. For expert guidance, research-backed insights, and innovative resources to support your hybrid or virtual organization, please visit chvo.nu.edu.

Companion Resource: Download Our Free eBook

To further support your journey in hybrid and remote leadership, download our first ebook, *Winning in the Virtual Workplace* (<https://www.amazon.com/dp/B0D11X2PB3>), which serves as a practical companion to this book, offering actionable strategies and expert insights from leading voices on leadership in hybrid and remote work.

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Foreword: Learning Together in this New World

Mark David Milliron, PhD
President & CEO, National University

The book you're about to enjoy is an exciting and important exercise in learning together. Indeed, the Center for Hybrid and Virtual Organizations (CHVO) at National University was created to bring together scholars and practitioners interested in better understanding and leading in our emerging organizational environments. There is good work to do to unpack what's working, what's not, and what's ahead.

I deeply connect with learning together for a host of reasons. One of the more prominent relates to the work I helped lead in co-founding Civitas Learning. Fourteen years ago, along with co-founders Charles Thornburgh and Laura Malcom, we helped build a company dedicated to helping higher education institutions make the most of the student stories hidden in the data being collected in their quickly expanding digital infrastructures. By leveraging the best of advanced ana-

lytics, data science, design thinking, and artificial intelligence, our mission was to help institutions nationally graduate a “Million More” students.

We named the company Civitas Learning because in Latin it translates to a community learning together. Our strategy was to bring together a dedicated group of institutions and educators committed to embracing these new tools, technologies, and techniques in the new and emerging data-rich world of education. Our goal was to bring to educators and students the infrastructure and tools for them to become their own “student success scientists”, helping more students learn well and cross their commencement stage with credentials arming them to thrive on the road ahead.

What happened next was special. Institutions rallied to the cause and began sharing with each other the steps on the journey. They learned about how to build powerful predictive models; to build applications that supported faculty, administrators, advisors, and students; to test emerging student-success strategies; and to better design pathways to and through their institutions. Some things worked, some things didn’t—but that was the point. We were there to learn together about how to not just survive but thrive on the road ahead.

Enter CHVO. What’s special about this second CHVO book and the case studies within, is that the authors are also pulling

together a broad community to shine a light on what's happening, ask hard questions, build models of promise, and advance practice that can make a difference.

We invite you to be a part of this community learning together because, like Civitas Learning, this work matters. Organizations are making choices and sometimes sweeping changes, and we're still in the earliest of days. Coming out of the pandemic, our tools, technologies, and techniques have exploded with possibilities to organize work and workplaces differently. There are serious implications for the impact on outcomes, quality of workplace culture, work-life balance, and even mental health. Put simply, there are no easy answers, and we all have a lot at stake as this learning comes together.

So, let's roll up our sleeves and get to work!

Introduction

Melody Rawlings, EdD and
John Frame, DPhil

While our first book, *Winning in the Virtual Workplace*, provided insights and strategies to help leaders thrive in remote and hybrid environments, this book brings these concepts to life through case studies. It shows how leaders and managers across industries navigate challenges of remote and hybrid work, exploring real-world scenarios so you can learn from industry leaders and enhance your own virtual leadership skills.

Leadership for a New World, like our first book, follows the structure of the Virtual Leadership Framework (see Figure 1). Each case in the book is aligned with a component of the framework.

This framework, developed by colleagues at the Center for Hybrid and Virtual Organizations, serves as a foundation for understanding and analyzing effective leadership in hybrid

and virtual settings.¹ The framework consists of six interconnected components: Emotional Intelligence, Communication, Engagement, Accountability, Human Capital, and Continuous Improvement. As seen in Figure 1, Emotional Intelligence is at the center of the framework, serving as the foundation for the other components.



Figure 1: The Virtual Leadership Framework

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1. Lubich, K. K., Rawlings, M., & Menefee, S. S. J. (2022). Emotional intelligence and virtual leadership: A framework and pathway forward. *International Leadership Journal*, 14(1), 77–86.

Each of the six components of the framework is briefly described below.

Emotional Intelligence

Emotional Intelligence is central to the Virtual Leadership Framework and is critical to leadership effectiveness. Leaders with high emotional intelligence understand and manage their own emotions while recognizing and responding to the emotions of others. This allows them to thoughtfully manage interpersonal relationships, build trust, and foster a supportive team environment. In remote settings, leaders must be especially attentive to emotional cues and signals, identifying potential challenges early and adapting communication to meet the needs of their team.

Communication

Effective communication is essential in virtual organizations. Leaders must carefully consider both formal and informal communication, as virtual employees and stakeholders depend heavily on electronic interactions. Practicing netiquette, the demonstration of courtesy and respect in online interactions, is vital for building a positive team culture. Establishing clear communication guidelines and strategies helps prevent misunderstandings and promotes collaboration, transparency, and efficiency.

Engagement

Promoting engagement, trust, and dedication is key to a productive and motivated virtual workforce. Leaders can foster engagement by conducting consistent check-ins, creating op-

portunities for social interaction, building a sense of community, and ensuring that all voices are heard and valued. By intentionally cultivating engagement, leaders strengthen team cohesion and create an environment where employees feel invested in organizational success.

Accountability

Accountability is crucial in virtual teams. Leaders establish accountability by defining clear goals, expectations, and performance metrics while ensuring that policies and procedures are transparent. Presence and accessibility are equally important; leaders must be available to guide their teams, monitor progress, and provide support as needed. This visibility reassures employees that the leader is committed to their success and the team's objectives.

Human Capital

Human Capital refers to the unique strengths, skills, and attributes that employees bring to the organization. Leaders leverage human capital by recognizing talent, supporting professional development, promoting inclusivity, and balancing work-life considerations. Maximizing human capital requires understanding individual contributions while aligning them with team and organizational goals.

Continuous Improvement

Continuous Improvement involves the ongoing effort to refine processes, enhance services, and strengthen organizational performance. This includes adopting an approach that emphasizes strengths, recognizing accomplishments, and learn-

ing from setbacks. Leaders also focus on change management, risk mitigation, and business continuity, ensuring that their teams remain resilient and adaptable in the face of challenges.

Altogether, these six components (Emotional Intelligence, Communication, Engagement, Accountability, Human Capital, and Continuous Improvement) make up the Virtual Leadership Framework, providing a model for understanding and analyzing effective leadership in hybrid and remote settings. This book is organized so that each case study aligns with a specific component of the framework, demonstrating how leaders navigate that element in a real-world scenario.

Building on our first book, *Winning in the Virtual Workplace*, this book offers actionable insights that we hope you can apply to your own remote or hybrid team, supporting you in your role as an effective leader building an engaged and high-performing team.

As authors of this Introduction, we wish to note, in the interest of transparency, that artificial intelligence tools have been used in the preparation of this section and may also have been employed in other sections of this volume, including in the development and wording of case studies. All content has been reviewed through the standard editorial process. Some of the cases in this collection are based on real organizations and leaders but have been anonymized to protect confiden-

tiality, while others are entirely fictional. Any resemblance to actual people, living or deceased, or to real organizations, events, or circumstances is purely coincidental.



This book includes eleven case studies spanning a number of topics relevant to hybrid and virtual work environments. In the first case, kicking off the theme of Emotional Intelligence, Melody Rawlings and Randee Sanders explore a company choosing a VP of product development from three internal candidates—each bringing different strengths in design, sales ambition, and emotional intelligence. This case highlights the challenge of balancing expertise, leadership style, and hybrid workplace culture in a strategic leadership decision.

Case 2 focuses on the theme of Communication, where Gleb Tsipursky writes about a law firm moving toward a hybrid work model by redefining its culture to build a more connected, resilient, and future-ready workplace. Case 3 also relates to the theme of Communication, with Kathy Richie exploring how a software company uses culturally aware virtual and hybrid teams to support its global expansion, emphasizing clear communication, cultural training, and strategic collaboration.

In cases 4 and 5, we turn a corner with Gary White and Maranda Johnson-Hartzog writing on the theme of Engage-

ment. Gary explores how a consulting group navigates the shift to a fully virtual organization, addressing challenges in communication, trust, team cohesion, and performance management to build a strong virtual work culture. Maranda examines how a mid-sized technology company, after shifting to a hierarchical leadership model, faces declining employee engagement and must explore transformational leadership, better communication, and renewed autonomy to rebuild a culture of innovation and retention.

Moving into the theme of Accountability, in case 6, Stephanie Menefee explores how a tech startup, after shifting to a fully remote work model, faces declining accountability and morale and must adopt stronger virtual leadership practices, clearer expectations, and outcome-focused communication to rebuild engagement and productivity. In case 7, Lisa M. Harris and Christine Gehrke explore how moving to virtual work revealed leadership and accountability problems that hurt culture and performance, raising the question of whether training can repair the damage.

Shifting to the theme of Human Capital in case 8, Eugene Wilkerson and Rochelle L. Cason-Wilkerson explore a case study about a hospital that rapidly transitioned from in-person care to 100% telehealth during the pandemic and is now reassessing its approach after provider concerns about technology use and care quality. As leadership moves to reduce telehealth services back to 10%, the hospital faces rising staff

attrition as employees leave for organizations that continue to support remote work flexibility. Continuing with the theme of Human Capital, case 9 by Shane Spraggs examines how a mid-sized software company operating fully remotely refined its virtual hiring and onboarding processes to improve engagement, retention, and new-hire integration.

Closing out the book in cases 10 and 11, Megan Dilley, Sunny Ziemer, and Emi Barresi write on the theme of Continuous Improvement. Megan and Sunny explore a case about a 600-person hybrid environmental technology company and how it prepares to hire a dedicated leader of remote work by evaluating its virtual operations and building a strategy to support this leadership role in managing a global hybrid workforce. Emi explores a case study of a global software company that used intentional team building, people-centric leadership, and collaborative technology to strengthen engagement, communication, and culture in a remote work environment.

Together, these experts share lessons about leadership, culture, and teamwork in hybrid and virtual work environments. *Leadership for a New World* offers examples of what works—and what doesn't—when organizations adapt to new ways of working. With that in mind, let's turn the page and step into the first case.

Selecting an Emotionally Intelligent Leader in a Hybrid Tech Company

Melody Rawlings, EdD and
Randee Sanders, DMgt

Mirage, a mid-sized company specializing in adaptive intelligence (AI), is facing an important decision in appointing a vice president of product development. The role is essential for driving innovation, expanding market presence, and maintaining the company's hybrid-first workplace culture. When possible, the organization prioritizes internal promotion. The leadership team considers three internal candidates: Meredith, known for her reliability and impressive design results; Ben, an ambitious sales leader with impressive results but interpersonal challenges, particularly in hybrid settings; and Chris, a strategic thinker with high emotional intelligence (EI) and strong team loyalty who excels in the hybrid workplace. This case provides the opportunity for students to explore the complexities of leadership selection,

balancing technical expertise, EI, and the ability to lead in a hybrid work culture to shape the future of Mirage.

Introduction

Since its founding in 2007, Mirage has been at the forefront of adaptive intelligence (AI), delivering cutting-edge solutions that seamlessly blend data analytics, machine learning, and human-centric design. Initially, Mirage focused on tailored AI systems for healthcare and retail but quickly gained a reputation for creating intuitive systems that adapt to the needs of users. This early success laid the groundwork for Mirage's evolution into a trusted AI partner for organizations across multiple sectors.

Today, Mirage operates as a mid-sized enterprise headquartered in Utah with satellite offices across the United States. Over the past three years, the company has experienced rapid growth, driven by the mainstream adoption of AI in enterprise operations. Mirage offers predictive analytics for supply chains and adaptive security platforms, serving a diverse clientele ranging from Fortune 500 companies to public-sector organizations.

The organization is proud of its hybrid-first workplace culture as a cornerstone of its success. Employees enjoy a foundation of flexibility, collaboration, and innovation, contributing to Mirage's recognition for more than four years running

as one of the best tech companies to work for. As the organization expands into new markets, it faces a critical decision: appointing a vice president of product development to steer its growth while upholding its innovative spirit.

This high-stakes decision requires careful consideration. The leadership team, CEO Janice, COO Marcus, and CFO Linda, recently met to discuss potential candidates for this important role.

The Leadership Debate

Janice understood that EI would be essential for the next vice president of product development, especially given the demands of leading in a hybrid-first environment, and she wanted to ensure the selected candidate possessed strong emotional insight and people skills. In preparation for the meeting with Marcus and Linda, Janice took time to revisit the fundamentals of EI and why it matters, especially in a hybrid workplace. She reviewed Daniel Goleman's framework, which breaks EI into four key areas: self-awareness, self-regulation, relationship management, and social skills (Goleman, 2019). Janice also reviewed the Virtual Leadership Framework, which takes a multifaceted approach to leading virtual and hybrid teams in five key focus areas: communication, engagement, accountability, human capital, and continuous

improvement. At the center of the framework is EI, which connects and strengthens each of the elements (Lubich, et al. 2022).

Janice knew it was no secret that leading and managing hybrid teams presents unique challenges that differ from traditional in-person teams. Lack of face-to-face interaction, limited informal conversations, and the difficulty of reading body language and nonverbal cues all make it harder to build trust and maintain cohesion. Given these realities, Janice believed it was more important than ever for leaders to possess a high level of EI. She saw EI as both a logical and practical framework for navigating the complexities of hybrid work because—despite differences in role, location, or background—people still share the same fundamental emotions, needs, and desires. Positive change can happen when leaders foster understanding, empathy, and collaboration. In particular, the EI components of self-awareness and self-management closely align with the values needed in a collaborative environment, such as concern for self and others, integration, inclusion, compromise, and communication (Cole et al., 2019). Leaders who demonstrate strong EI not only create more connected and engaged teams, but they also drive higher productivity and greater effectiveness in virtual and hybrid settings.

The trio gathered in Mirage’s conference room, where CEO Janice opened the discussion: “Thank you both for attending this important meeting. As we prepare to appoint a vice

president of product development, I want us to put our cards on the table and discuss the candidates we each have in mind. This role is crucial, not only for product innovation, but also for leading our teams in a way that aligns with Mirage's culture."

CFO Linda leaned forward and responded, "For me, the best choice is Meredith, our Director of Product Design. She's been with us for five years and has consistently delivered strong results. Meredith is meticulous, and while she occasionally misses deadlines, she always compensates with extra effort to meet expectations. Her work consistently exceeds standards, and she's been vocal about wanting more responsibility. Meredith reminds me of myself when I was moving up the ranks—a steady, reliable leader with a proven track record."

COO Marcus countered, "Linda, I respect Meredith's contributions, but my choice is Ben, our Director of Sales. His numbers are undeniable; sales have increased 35–40% annually under his leadership. He has bold ideas for new products based on market trends and isn't afraid to take risks. Yes, I've heard some complaints from his team about his lack of availability and empathy, but I believe those are issues he can overcome with coaching. Ben's results-oriented mindset is exactly what we need to expand into new markets."

Janice frowned in concern and responded, “Ben’s lack of emotional intelligence isn’t something to brush aside. We’ve seen firsthand how leadership gaps in that area can impact team trust, cohesion, and morale. Speaking of which, the person I believe is best suited for the role is Chris, our Director of Product Support for home security systems. Chris excels in adaptability and strategic thinking. He has consistently led his team to meet deliverables while maintaining a clear vision for the future. His ability to foster strong relationships is reflected in the lowest turnover rate in the company. Chris understands that leadership isn’t just about results; it’s about inspiring others to achieve them.”

Team Feedback Summary

To better inform their decision, the leadership team also reviewed anonymized feedback from team members across departments.

- Meredith was described as “extremely competent and detail-oriented,” but some noted she could be “hard to read” in remote settings, and she often “sticks to the task rather than checking in.”
- Ben’s team expressed mixed feelings. While they appreciated his “vision and drive,” several mentioned he “rarely asks how the team is doing.” One noted, “It feels like our input only matters if it supports his plan.”

- Chris received consistently positive comments. One team member shared, “Even when we work from home, he reaches out to check in—not just on work, but how we’re managing life. That really makes a difference.”

The Emotional Intelligence Factor

The debate grew more intense as each leader defended their pick. Linda emphasized Meredith’s steady reliability, highlighting an instance when Meredith’s thorough attention to detail saved a major product launch from potential failure. However, Linda also acknowledged that Meredith’s interactions with her team could sometimes come across as overly task focused. Linda explained, “In a hybrid work environment, it’s harder to get a read on how the team is doing. When one of her team members expressed the feeling of being overwhelmed during a tight deadline, Meredith reallocated tasks but didn’t check in on their well-being afterward, which is something that can easily be overlooked in a hybrid work environment in which face-to-face interactions are limited.”

Marcus argued for Ben’s bold vision despite his interpersonal shortcomings. He cited Ben’s successful leadership during a critical sales pitch when his market insights led to securing a lucrative contract. Marcus said, “Ben’s market instincts are exactly what we need, especially in today’s hybrid market. He knows where the opportunities are.” Yet, Marcus conceded

that Ben's team had voiced frustrations about his unavailability and lack of empathy. He acknowledged a time when Ben dismissed a team member's concerns about a scheduling conflict, observing, "That kind of behavior can lead to frustration, especially in a hybrid setup where people aren't in the same space to hash things out face to face."

Janice, however, brought the conversation back to the role's broader demands. "This role is about more than hitting targets," Janice said firmly. "It's about leading in a way that inspires trust and innovation, especially in a hybrid environment in which connection is even harder to maintain. Emotional intelligence is a non-negotiable quality. Ben's numbers are impressive, but his team's concerns about his availability and lack of empathy are red flags. A leader who struggles to connect with their team in both remote and in-person settings risks causing burnout and turnover—issues we can't afford as we scale." Janice then pointed to Chris as a stand-out candidate, offering a specific example of his EI in action: "When a team member faced a family emergency, Chris not only adjusted deadlines but also personally reached out to ensure they felt supported, even though we were working remotely part of the week. This kind of personal touch really matters in a hybrid setting. It's not just about getting the job done; it's about showing your team that you care about them as people, not just employees."

Emotional Intelligence Snapshot

To underscore the significance of the decision, Janice shared a one-page framework with the leadership team, drawn from Goleman's (2019) work, outlining the core domains of EI:

- **Self-awareness** is the ability to understand our own emotions that helps us to understand the emotions felt by others.
- **Self-regulation** comes from the part of our brain that gives us cognitive control, regulating attention, decision-making, voluntary action, reasoning, and flexibility when responding to a situation.
- **Relationship management** involves an ability to empathize and work collaboratively with others, understanding their feelings and perspectives.
- **Social skills** is the ability to understand, use, and manage your emotions in positive ways to reduce stress, communicate effectively, empathize with others, overcome challenges, and handle conflict. Social awareness is a challenging issue in the hybrid world with limited face-to-face interaction. Extra effort and creative ideas need to be explored to address this challenge.

Janice said, “We need a leader who checks these boxes—not perfectly, but meaningfully.”

Marcus reluctantly agreed but countered, “I hear you, Janice, but those are teachable skills. You can’t teach someone to have Ben’s instinct for spotting market opportunities.”

Linda chimed in, “I agree emotional intelligence is important, but we also need someone who can deliver under pressure, especially in a hybrid environment. Meredith has demonstrated that time and again. She’s not flashy, but she’s reliable. When there’s a tight deadline, she delivers! Whether working in the office or remotely.”

Janice shook her head. “Reliability is valuable, but so is vision,” she said. “Chris brings both. He’s adaptable, forward-thinking, and genuinely cares about his team, which is always crucial, especially in a hybrid setting. That balance of emotional intelligence and strategic insight is what sets him apart.”

Scenario-Based Discussion

To assess the candidates’ leadership judgment, Janice proposed a hypothetical situation: “Imagine this: A hybrid team member misses multiple deadlines. Their work has declined, and their usual responsiveness has dropped off. It’s starting to affect project momentum. How would your candidate handle it?”

Linda responded first. “Meredith would definitely address the performance issue and realign expectations,” she said. “She’s

task-focused, so she'd likely move straight into problem-solving. But she might overlook checking in on the *why* behind the drop in performance."

Marcus chimed in, "Ben would likely schedule a quick check-in and push for a turnaround plan. He's results-driven, so he'd be focused on getting things back on track fast. I just don't know if he'd take the time to ask how the person is doing personally."

Janice nodded and added, "Chris would recognize that something deeper might be going on. He'd approach the conversation with curiosity and empathy, asking open-ended questions to understand what's behind the behavior before jumping into solutions. That kind of response not only solves the issue but also strengthens trust."

The Path Forward

As the meeting concluded, it was clear that no single candidate had unanimous support. The three leaders agreed to gather additional insights, including feedback from peers and direct reports, before making a final decision.

Janice said, "We'll reconvene in a week. In the meantime, let's think about which candidate can not only do the job, but also lead most effectively in a hybrid environment, demonstrate emotional intelligence, and elevate Mirage's culture and position as a leader in adaptive intelligence."

The decision ahead would not only shape the company's growth trajectory but also influence its ability to maintain a strong and emotionally aware culture built on collaboration and trust in a hybrid work setting. This capability is essential for sustaining long-term success in the evolving field of adaptive intelligence.



Teaching Notes

Case Synopsis

The focus of this case is Mirage, a fast-growing AI company with a hybrid-first culture. Mirage is facing a crucial leadership decision. The CEO and leadership team are tasked with selecting a new vice president of product development from among three internal candidates. While each candidate offers strong technical skills and strategic vision, the case highlights the importance of EI in effective leadership. Key traits like empathy, adaptability, and authentic communication are crucial for leading in a hybrid environment and fostering innovation, trust, and team cohesion, ultimately shaping the company's future success.

The purpose of this case study is to help students understand the critical role EI plays in effective leadership within a hybrid organization. The case challenges students to develop the skills needed to assess candidates on not only technical quali-

fications but also their ability to foster trust, communication, and adaptability in a blended work environment.

Learning Outcomes

By the end of this case, readers should be able to:

1. **Analyze** the role of EI on leadership effectiveness within hybrid work environments.
2. **Evaluate** how EI impacts team morale, productivity, and organizational culture in a hybrid setting.
3. **Identify** strategies for selecting leaders with the EI required to succeed and foster collaboration in hybrid work environments.

Teaching Objectives

1. **Analyze** the impact of EI on leadership effectiveness in hybrid work environments.
2. **Compare and contrast** the strategic and interpersonal strengths of potential leaders in a hybrid workplace.
3. **Assess** which leadership attributes best align with the operational and cultural demands of a hybrid-first, AI-driven organization.

Teaching Approach

Instructors and trainers can effectively utilize this case by grounding the discussion in Goleman's (2019) model of EI, which includes self-awareness, self-regulation, relationship management, and social skills—a valuable lens for analyzing leadership effectiveness. The Virtual Leadership Framework (Lubich, et al., 2022) provides a foundation to emphasize EI through intentional communication, strategic relationship building, trust, adaptability, and emotionally intelligent leadership. By incorporating these core EI competencies, instructors can guide learners to explore how emotionally intelligent behaviors influence team dynamics, decision making, and virtual collaboration. This approach is adaptable across academic settings such as undergraduate and postgraduate courses, as well as organizational settings focused on professional development, and is suitable for in-person, online, or hybrid delivery.

Discussion Questions

1. What are the potential short- and long-term impacts of prioritizing technical skills over EI in a leadership role within a hybrid workplace?
2. How can EI influence team performance and retention in a hybrid workplace?

3. Why should EI be considered in acquiring organizational leadership talent, whether through promotion or external hire?
4. What strategies can leaders use to develop their own EI and that of their teams?

Suggested Responses

1. In the short term, prioritization of technical skills may help achieve immediate results, but such prioritization may lead to communication gaps, lack of trust, miscommunication, and disengagement. In the long term, not prioritizing EI may lead to burnout, a decline in morale, and turnover, making it difficult to maintain a collaborative and innovative workplace.
2. Leaders with strong EI build trust, improve communication, and create an environment in which everyone's voice is heard. This can lead to a higher level of employee engagement, stronger performance, and greater retention as employees feel supported, respected, and heard, especially in a hybrid work environment.
3. Advancing ideals of EI should begin prior to acquiring talent, since the desire should be to have the type of people who know and understand gainful EI

principles and who will share them with their team. Virtual team members may seek a level of independence unlike in a traditional office setting, and leaders with high levels of EI are more likely to recognize the intentional relationship building skills needed to engage hybrid and fully remote team members. Practicing EI is critical to the development of business continuity and competency and the efficient oversight of stakeholders, including upper management, hybrid, and virtual team members.

4. Leaders can enhance their EI by focusing on self-awareness, actively seeking feedback, and engaging in self-reflection. To develop EI within their teams, leaders should foster an environment of open communication, prioritize active listening, and demonstrate empathy. Encouraging effective conflict resolution and creating opportunities for emotional growth will help strengthen both individual and team collaboration.

Activity

Imagine you are part of the leadership team at Mirage. Using Goleman's (2019) EI framework, evaluate each candidate's strengths and potential risks. Based on the case, who would you recommend and why?

Bonus: Develop a brief leadership coaching plan for the candidate you do *not* choose. What EI skills would you prioritize?

Suggested Solution

Using Goleman’s (2019) EI framework, Chris demonstrates strong self-awareness, empathy, and social skills. He actively listens, builds trust, and supports his team’s emotional needs, making him well-suited for leading in a hybrid environment. Ben shows high motivation and adaptability, but he struggles with empathy and self-regulation, sometimes prioritizing results over relationships. Meredith is a confident visionary, but her limited emotional self-awareness and lack of sensitivity to team dynamics could undermine cohesion.

Based on these observations, Chris is the strongest candidate. His emotionally intelligent leadership style supports his team’s well-being, communication, and collaboration—key qualities needed to lead effectively in Mirage’s hybrid workplace.

Supplemental Resources

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2

Building a Collaborative and Future-Ready Culture in a Hybrid Law Firm

Gleb Tsipursky, PhD

This case study explores a mid-sized law firm (referred to as Jackson & Fields LLP to avoid publicly revealing the client) that is transitioning to a hybrid work model while striving to build a collaborative and resilient internal culture. Faced with challenges common to hybrid environments such as inconsistent communication, gaps in onboarding, diminished mentorship, and resistance to technology integration, the firm's leadership identifies key focus areas in order to address these issues. To foster clear and responsive communication, Jackson & Fields LLP adopts digital collaboration tools and establishes specific response protocols. Recognizing the need for a cohesive team culture, the firm also revamps its onboarding process to emphasize cultural integration alongside technical training, pairing new hires with "culture ambassadors" and utilizing scenario-based learning. Through

mentorship, the firm reimagines professional development by integrating personalized learning plans and informal mentoring opportunities into daily activities. A major element of this transition involves implementing generative AI tools, such as Microsoft CoPilot and NetDocs, to streamline workflows. Leadership introduces a phased rollout with a structured change management approach, aiming to secure buy-in from associates and partners while balancing technological efficiency with the firm's client-focused values.

By engaging in this case study, students will examine practical strategies for creating a cohesive hybrid workplace; evaluate the balance between cultural alignment and technical efficiency; and develop actionable insights for navigating similar challenges in professional services. This case study serves as a blueprint for effectively managing communication, onboarding, mentorship, and technology integration within a hybrid model, with broad applicability across various professional contexts.

Introduction

In the wake of rapidly evolving workplace dynamics, a mid-sized law firm, Jackson & Fields LLP, has embarked on a strategic transformation to adopt a hybrid work model. Driven by an understanding that hybrid structures can offer flexibility and efficiency, the firm is particularly focused on

strengthening its internal culture, enhancing communication, and leveraging emerging technologies like generative AI to stay competitive. During a strategic retreat facilitated by Dr. Gleb Tsipursky, partners and senior associates discussed the critical challenges they face in sustaining a cohesive culture across both in-office and remote environments, particularly concerning communication standards, onboarding practices, mentorship, and technology integration.

Background Information

Founded in the early 2000s, Jackson & Fields LLP has built a reputation as a respected legal service provider in corporate law with a specialization in mergers and acquisitions. As a traditionally office-based firm, its culture has relied heavily on in-person collaboration and mentorship, often reinforced through regular meetings and close interactions between associates and partners. However, with the pivot toward hybrid work, the firm has encountered communication inefficiencies, onboarding inconsistencies, and a lack of structured mentorship, prompting leadership to explore innovative solutions.

Statement of the Problem

The transition to a hybrid work environment has revealed gaps in Jackson & Fields LLP's internal operations. Associates

report inconsistent expectations about email responsiveness, and they struggle without clear protocols to manage collaboration on projects. New hires face challenges in aligning with the firm's culture, as onboarding primarily addresses technical aspects of the job without adequately immersing them in the firm's values. Mentorship, once a hallmark of the firm, has suffered in the absence of regular face-to-face interactions, weakening the support network essential for associate development. Recognizing these issues, the firm has identified the need for a holistic change management approach to reinforce its culture, improve mentorship, and integrate technology effectively.

Significance of the Study

As more firms transition to hybrid models, understanding the strategic components of successful hybrid work implementation has become essential. This case provides a practical look at the intersection of culture, mentorship, technology, and change management in a legal setting, offering insights into building a cohesive and high-performing hybrid team. By navigating this scenario, students will gain valuable skills in balancing technical and cultural elements of onboarding; leveraging mentorship in professional development; and implementing technology with a focus on cultural alignment. These skills are applicable to various professional contexts.

Case Problem

Jackson & Fields LLP has embarked on its hybrid work journey with an ambitious agenda: to create a collaborative, future-ready culture while optimizing operational efficiency through technology. Yet, the challenges have been more substantial than anticipated. Associates struggle with inconsistent communication practices, particularly in response times and expectations about virtual interactions. The onboarding process lacks the depth needed to foster cultural alignment, leaving new hires feeling disconnected from the firm's values and goals. Mentorship has also declined in effectiveness, hindered by reduced face-to-face opportunities that were historically a vital component of associate training and development. Additionally, the firm's plan to integrate generative AI tools like Microsoft CoPilot and NetDocs faces resistance, with some attorneys wary of technology's potential to disrupt traditional workflows and personal client interactions.

As the firm prepares to address these multifaceted issues, Jackson & Fields LLP's leaders seek insights on how best to tackle each component.

Communication Protocols

How can Jackson & Fields LLP establish clear and consistent communication practices in a hybrid model that enhance responsiveness and foster a culture of collaboration? What role

can digital tools play in this transformation, and how can the firm ensure that these tools align with their values?

Cultural and Technical Onboarding

What strategies should the firm adopt to enhance its onboarding program, emphasizing not only technical training but also cultural integration? How can new hires be quickly aligned with the firm's values and practices, creating a cohesive team culture despite physical separation?

Mentorship and Informal Learning

How can Jackson & Fields LLP reinvigorate mentorship within the constraints of hybrid work? What models of mentoring and informal learning could effectively support continuous professional development and cultural immersion, especially for associates who are remote?

Technology Integration and Change Management

With the implementation of generative AI tools, what steps can the firm take to manage this shift and gain buy-in from associates and partners? How can Jackson & Fields LLP address the cultural impact of AI adoption, ensuring that it enhances and does not detract from client satisfaction and firm values?

Overview of Questions for Resolution

As Jackson & Fields LLP pursues its goal of a streamlined and adaptable hybrid model, students are asked to consider the following:

- What communication protocols and practices could reinforce collaboration and responsiveness in the firm's hybrid structure?
- How should the firm structure its onboarding process to support cultural and technical integration from day one?
- In what ways can mentorship and informal learning be adapted to support hybrid associates, and how can the firm make every professional activity an opportunity for learning?
- What change management strategies would facilitate the adoption of AI tools, ensuring they align with the firm's culture and priorities?

These questions require a critical look at how Jackson & Fields LLP can balance the technical demands of a hybrid workplace with a robust, people-focused approach to culture. Students will analyze each aspect, using theoretical frameworks and best practices to propose actionable recommendations.

Scenario Context

As Jackson & Fields LLP transitions to a hybrid work model, it faces challenges that underscore the complexity of aligning a dispersed workforce with the firm's strategic objectives. With nearly half of the associates and partners opting to work remotely at least three days a week, the firm has seen a noticeable gap in communication consistency, mentorship effectiveness, and cultural integration among remote employees. These challenges prompted the leadership team to convene for a strategic retreat, where they identified four focus areas: communication protocols, onboarding practices, mentorship programs, and technology integration.

Communication Protocols and Collaborative Practices

The firm has struggled with inconsistent expectations about responsiveness, especially in managing client communications across different locations. The leadership team decided to address this by implementing specific guidelines for email response times and real-time collaboration using Microsoft Teams. To foster a responsive and communicative culture, Jackson & Fields LLP has also developed a targeted training program focused on maximizing the collaborative functions of Teams. This program includes workshops on managing client projects within Teams, utilizing virtual collaboration tools for case research, and setting response expectations for each team member.

While these efforts have shown early promise in increasing transparency, some associates express concerns that the push for responsiveness feels intrusive, particularly when working remotely. Others struggle with mastering the new tools, leading to a learning curve that impacts productivity. The firm is now considering additional support, such as on-demand training videos and one-on-one coaching, to ease this transition.

Cultural and Technical Onboarding

The leadership team also identified onboarding as a crucial element in building and sustaining the firm's culture. Historically, Jackson & Fields LLP's onboarding was highly technical, emphasizing case management software, billing protocols, and document filing systems. However, new hires often felt disconnected from the firm's core values, with remote associates, especially reporting difficulty feeling part of the team.

To address this, the firm developed an enhanced onboarding program that integrates cultural immersion with technical training. This includes scenario-based exercises simulating client interactions, role-playing sessions that reinforce firm values, and structured feedback loops through which mentors can provide guidance on both procedural and cultural aspects. As part of this initiative, each new hire is also paired with a "culture ambassador," an experienced team member

who helps them understand and integrate into the firm's practices and expectations.

The feedback on this revised onboarding process has been positive, particularly from recent hires who report feeling more connected to the firm's mission and vision. However, some senior associates expressed concern about the time required to participate in these onboarding activities, prompting leadership to explore a balance between thorough cultural integration and minimizing time demands on seasoned staff.

Mentorship and Informal Learning

Mentorship has been a longstanding tradition at Jackson & Fields LLP, where senior attorneys actively guide associates through the nuances of legal practice and client relations. With the shift to hybrid work, however, the frequency and quality of these interactions have diminished. Recognizing that mentorship is critical to associate development, the firm has redefined mentorship as an integral part of every professional activity, encouraging informal learning through ongoing collaboration.

To operationalize this, Jackson & Fields LLP implemented personalized learning plans for each associate, developed in consultation with their mentors. These plans outline specific skills and competencies for each associate to develop, aligned with their career goals. Monthly mentoring sessions

are now held via video calls, supplemented by periodic in-person gatherings to reinforce personal connection. This new approach is supported by structured learning modules available in the firm's knowledge management system, providing resources that associates can access as needed.

The revamped mentorship program has increased engagement, with associates reporting that the personalized approach aligns better with their professional goals. However, remote associates still express a desire for more face-to-face interaction, and some mentors note that balancing these responsibilities with their own caseloads remains challenging.

Technology Integration and Change Management

In its commitment to adopting cutting-edge tools, Jackson & Fields LLP has introduced generative AI technologies, including Microsoft CoPilot for document automation and NetDocs for research and drafting. These tools are intended to reduce time spent on repetitive tasks, freeing attorneys to focus on more complex legal work and client relations. Recognizing the potential cultural impact of this shift, the firm established a change management plan to help gain buy-in from associates and partners. This plan includes informational sessions on the benefits of AI, workshops on effective use of the tools, and open forums where employees can voice concerns and ask questions.

Despite these efforts, reactions to the AI tools have been mixed. While some attorneys see the potential for increased efficiency, others worry that reliance on technology may undermine the firm's reputation for personalized client service. To address this, leadership is considering a phased rollout of these tools, initially targeting routine tasks with minimal client interaction and gradually expanding usage as employees gain confidence and familiarity.

Outcomes and Challenges

The strategies implemented by Jackson & Fields LLP have yielded early signs of success in some areas, particularly in communication and mentorship. Associates have reported improved clarity in response expectations, and the personalized mentoring approach has been well-received. However, challenges remain. The firm continues to refine its onboarding program to balance depth with efficiency, and leadership is evaluating additional measures to support associates who are adjusting to the AI tools.

As Jackson & Fields LLP progresses through this transition, the leadership team recognizes that cultivating a supportive, future-ready culture will require ongoing adjustments and responsiveness to feedback from associates and partners alike.

Conclusion

The transition to a hybrid work model at Jackson & Fields LLP has revealed critical challenges that many professional firms encounter as they adapt to new workplace dynamics. By examining the firm's efforts to establish clear communication protocols, revamp onboarding for cultural cohesion, implement effective mentorship, and introduce generative AI technology, this case study sheds light on the intricate balance required to create a future-ready, collaborative culture.

The firm's leadership team has made commendable strides by establishing response expectations, providing training for digital collaboration, and enhancing mentorship through structured learning plans. These steps have led to improved communication transparency and alignment of professional development with associates' career goals. However, feedback from associates and mentors reveals ongoing challenges, particularly in achieving cultural integration for remote employees and ensuring that technology is adopted with enthusiasm rather than resistance.

Jackson & Fields LLP's approach underscores the importance of a comprehensive change management plan that considers the perspectives and needs of all stakeholders. Their phased approach to AI adoption, combined with forums for open dialogue and mentorship, reflects a commitment to creating a hybrid workplace that harmonizes efficiency with the

firm's established values. This gradual, consultative strategy demonstrates that transitioning to hybrid work requires not only operational adjustments but also a keen sensitivity to the cultural dimensions of a professional services firm.

The insights gained from Jackson & Fields LLP's experience highlight the need for organizations to continually reassess and refine their hybrid work strategies. As the firm navigates these complexities, its focus on feedback-driven improvements and employee engagement provides a model for others aiming to build a resilient, high-performing hybrid team.

Through this case study, students will gain a practical understanding of the strategies required to manage communication, onboarding, mentorship, and technology integration in a professional hybrid setting. They will learn to critically evaluate the effectiveness of these initiatives and apply similar approaches to fostering collaboration and cultural alignment in their own organizational contexts.



Teaching Notes

Case Synopsis

In this case, Jackson & Fields LLP, a mid-sized law firm, is transitioning to a hybrid work model while seeking

to strengthen its internal culture, improve collaboration, and implement generative AI tools. As they navigate these changes, the firm encounters challenges in communication consistency, cultural and technical onboarding, mentorship, and technology integration. The case study encourages students to critically analyze strategies for creating a high-performing hybrid team in a professional services context, focusing on balancing technical efficiency with cultural alignment.

Purpose of the Case Study

This case study examines Jackson & Fields LLP's journey to establish a forward-looking, collaborative, and resilient culture within a hybrid model. It explores how the firm can develop communication protocols, revamp onboarding to emphasize cultural integration, and leverage mentoring as a continuous developmental tool, all while managing the complexities of technology integration. The study aims to present students with real-world challenges that are increasingly common in professional services firms adapting to hybrid work.

Learning Outcomes

By the end of this case, readers should be able to:

- **Evaluate** effective communication protocols for hybrid workplaces, including digital tools that promote responsiveness and collaboration.
- **Analyze** onboarding processes that integrate cultural and technical elements, emphasizing team cohesion and alignment with organizational values.
- **Explore** mentorship models adapted for hybrid environments, emphasizing continuous professional development and informal learning.
- **Assess** change management strategies for technology adoption in professional settings, focusing on balancing efficiency with cultural impact.

Teaching Approach

This case is versatile for use in academic and professional development settings and can be adapted for both group and individual analysis. Suggested teaching strategies include:

- **Discussion-based approach:** In both online and in-person settings, divide students into small groups and assign each group one of the four focus areas (communication, onboarding, mentorship, or technology). After analyzing their assigned area, have

each group present their insights and recommendations to the class. Facilitate a class-wide discussion on how these strategies interrelate to create a cohesive hybrid work culture.

- **Simulation or role-play:** Assign students roles within the firm, such as partner, associate, or mentor, and simulate a strategic planning meeting. Encourage each participant to advocate for solutions to the issues presented in the case, creating a dynamic, real-world learning experience.
- **Case study analysis with written response:** For asynchronous settings, students can individually analyze the case and submit written responses addressing the guiding questions. Students may also create an infographic summarizing their recommendations for visual presentation.

Discussion Questions

1. How can Jackson & Fields LLP develop effective communication protocols to support collaboration and responsiveness in a hybrid model?
2. What role should digital tools play, and how can the firm ensure these tools are effectively adopted by all team members?

3. What improvements should be made to the firm's onboarding process to enhance cultural and technical integration?
4. How can the firm quickly align new hires with its values, creating a unified culture despite remote work?
5. In what ways can mentorship and informal learning be structured to support hybrid associates?
6. How can the firm ensure that professional development remains robust even with limited face-to-face interactions?
7. How can Jackson & Fields LLP manage the adoption of generative AI tools in a way that secures buy-in from both associates and partners?
8. What steps should the firm take to balance the efficiency gains of AI with the need to preserve its culture of personalized client service?

Suggested Solutions

1. How can Jackson & Fields LLP develop effective communication protocols to support collaboration and responsiveness in a hybrid model?

- Establish firm-wide “core collaboration hours” (e.g., 10 a.m. to 4 p.m.) when all personnel must be available for synchronous communication, regardless of their work location.
- Implement standardized Service Level Agreements (SLAs) for communication, such as a four-hour response time for internal emails and a two-hour response time for direct messages within Microsoft Teams.
- Mandate that every project or matter begins with the creation of a “communication charter” outlining the designated primary channels, meeting rhythms, and key contact points for the team.
- Conduct mandatory training on “digital body language” to improve the interpretation of tone in written communication and the effective use of video conferencing etiquette.
- Require that all scheduled meetings include a pre-distributed agenda with clear objectives and conclude with a distributed summary of action items and decisions within 24 hours.

- Encourage partners to schedule and hold weekly virtual “office hours” when associates can ask questions and receive informal guidance, simulating spontaneous in-office interactions.
 - Develop and circulate a “channel guide” that clearly defines the purpose of each communication tool (e.g., email for formal client correspondence, Teams for internal collaboration, etc.).
 - Introduce “deep work” blocks or “no-meeting” periods into the firm-wide calendar to protect time for focused, asynchronous work and reduce virtual meeting fatigue.
2. What role should digital tools play, and how can the firm ensure that these tools are effectively adopted by all team members?
- Position Microsoft Teams as the central collaboration hub by integrating it with other essential firm systems like document management and billing software to create a unified workflow.
 - Create a “technology champions” program by identifying and training tech-proficient individuals within each practice group to provide peer support and promote best practices.

- Develop a role-based training curriculum with modules tailored to the specific daily tasks of partners, associates, and administrative staff.
- Introduce gamification elements to the training process, such as awarding badges for completing modules or offering small incentives for demonstrating proficiency with new tools.
- Build a comprehensive, on-demand learning library of short video tutorials and quick-reference guides to empower employees to find immediate solutions to specific technical problems.
- Establish formal feedback channels, like a dedicated Teams channel or regular surveys, to gather input on the tools and use it to refine processes and training.
- Mandate the use of specific digital tools for key administrative and collaborative tasks, such as requiring all document version control to occur within the designated document management system.
- Regularly showcase success stories and key metrics (e.g., time saved, improved client feedback, etc.) to demonstrate the tangible return on investment (ROI) of adopting new digital tools.

3. What improvements should be made to the firm's onboarding process to enhance cultural and technical integration?
- Design the first week as a structured hybrid experience, blending in-person social events and office tours with virtual introductions to key firm leaders and systems training.
 - Implement a dual-mentorship system by assigning each new hire a "technical mentor" for skill development and a "culture ambassador" from a different department to help navigate the firm's social dynamics.
 - Incorporate realistic, scenario-based exercises into onboarding that challenge new hires to make decisions aligned with the firm's core values in simulated client interactions.
 - Create a structured shadowing program that allows new hires to observe professionals (both virtually and in person), such as partners in client negotiations or associates in drafting sessions.
 - Provide a 90-day "onboarding journey map" that clearly outlines learning objectives, training schedules, key milestones, and planned check-ins with managers and mentors.

- Group new hires into a “cohort” that advances through the onboarding process together, fostering a peer support network through shared training and dedicated social events.
 - Develop a centralized digital onboarding portal that provides asynchronous access to all necessary documents, training materials, schedules, and company contacts.
 - Include a session led by a senior partner about the firm’s history and significant cases to connect new hires with the firm’s legacy and long-standing identity.
4. How can the firm quickly align new hires with its values, creating a unified culture despite remote work?
- Feature “values in action” storytelling during onboarding, when firm leaders and peers share concrete examples of how the firm’s values have been applied in real-world situations.
 - Integrate firm values as a distinct category in all performance reviews and 360-degree feedback processes, signaling that cultural alignment is a key metric for success.

- Provide new hires with a decision-making framework based on firm values, offering guiding questions to apply when facing ethical or client service dilemmas.
- Launch a peer-to-peer recognition program, using a public digital channel where employees can acknowledge colleagues for actions that exemplify firm values.
- Mail a physical “culture pack” to all new hires containing branded items, a welcome letter from the managing partner, and items from local businesses to create a tangible connection to the firm.
- Host mandatory, in-person, firm-wide retreats at least annually that focus specifically on team building, strategic alignment, and cultural reinforcement.
- Organize regular, informal, virtual social events, such as coffee chats or special interest groups, to foster spontaneous personal connections that build a strong culture.
- Ensure senior leadership is consistently visible and accessible to new hires through virtual town halls, “ask me anything” sessions, and active participation in digital channels.

5. In what ways can mentorship and informal learning be structured to support hybrid associates?
- Adopt a project-based mentoring model in which associates receive real-time coaching from the senior lawyer leading each specific matter, providing varied and context-rich guidance.
 - Establish a “reverse mentoring” program that pairs junior associates with senior partners to share knowledge on emerging technologies, new communication norms, and generative AI tools.
 - Host regular virtual “brown bag” lunches when individuals can informally present a recent legal insight or practice tip, followed by a collaborative Q&A session.
 - Mandate structured feedback sessions after the completion of every major project, creating predictable and consistent opportunities for targeted professional development.
 - Form small “mentoring circles” consisting of a partner and several associates at different levels who meet monthly to discuss career progression and challenges in a confidential setting.

- Utilize a “learning in the flow of work” digital platform on which associates can ask questions and receive answers from subject matter experts, with the results archived into a searchable knowledge base.
 - Formalize Personalized Learning Plans (PLPs) that include a mix of formal training, experiential learning goals (e.g., taking the lead on a deposition), and relationship-building objectives.
 - Cultivate a culture of “sponsorship” by encouraging senior partners to not only provide advice but also actively advocate for their mentees for high-visibility assignments and promotions.
6. How can the firm ensure that professional development remains robust even with limited face-to-face interactions?
- Develop and publish a detailed competency framework that clearly outlines the skills and behaviors required for advancement at each stage of an associate’s career.
 - Invest in a high-quality e-learning platform and have senior lawyers curate learning paths that align with the firm’s competency framework and specific practice areas.

- Conduct virtual simulations of trials, negotiations, and other key legal activities using video conference breakout rooms, allowing for practice and real-time coaching from partners.
- Designate firm-wide “professional development days” when billable work is paused and all lawyers participate in sessions on strategy, skills, and business development.
- Offer access to external executive coaches for high-potential senior associates to help them develop advanced leadership, client management, and business development skills.
- Implement a formal rotation program that allows associates to spend time in different practice groups to gain broader institutional knowledge and a more diverse skill set.
- Formally track and reward non-billable development activities, such as mentoring, publishing articles, or presenting at industry events, by linking them to compensation and advancement decisions.

- Proactively pursue client secondment opportunities when associates can be temporarily embedded with a client, providing invaluable commercial experience that is well-suited for hybrid work.
7. How can Jackson & Fields LLP manage the adoption of generative AI tools in a way that secures buy-in from both associates and partners?
- Form an AI steering committee with members from all levels of the firm—partners, associates, IT, and staff—to guide implementation and ensure diverse perspectives are considered.
 - Launch a pilot program with volunteer “early adopters” from various practice groups to test the tools on real-world tasks and champion their benefits to their peers.
 - Develop and disseminate a clear and evolving “AI use policy” that addresses client confidentiality, data security, and the ethical obligation to verify AI-generated output.
 - Consistently frame the technology as a tool for “augmentation, not replacement,” emphasizing how it frees up lawyers to focus on high-value strategic work and client relationships.

- Deliver mandatory, practice-group-specific training that focuses on practical use cases, such as using AI to accelerate due diligence review for M&A or summarize depositions for litigation.
 - Provide a “sandbox” environment in which all employees can experiment with AI tools using non-confidential data, fostering learning and innovation without risk.
 - Proactively address how AI-driven efficiencies will impact the billable hour model and compensation and explore alternative fee arrangements that reward value and efficiency.
 - Widely publicize “early wins” from the pilot program, sharing specific metrics and testimonials that create a compelling, data-driven case for firm-wide adoption.
8. What steps should the firm take to balance the efficiency gains of AI with the need to preserve its culture of personalized client service?
- Institute a mandatory “human-in-the-loop” policy requiring that a qualified lawyer thoroughly review, edit, and approve any AI-generated work product before it is sent to a client or filed with a court.

- Commit to reinvesting the time saved through AI into more value-added client activities, such as strategic planning sessions, proactive industry updates, and deeper relationship-building.
- Develop clear guidelines for communicating the firm's use of AI to clients, framing it transparently as a commitment to providing innovative and cost-effective legal services.
- Actively solicit feedback from key clients about the firm's use of AI, engaging them in dialogue to ensure the technology enhances and does not detract from their experience.
- Increase investment in training for uniquely human "soft skills" such as empathy, creative problem solving, and building trust, as these become greater differentiators.
- Create and train lawyers on a framework that helps them distinguish between "high-tech" tasks suitable for AI (e.g., legal research) and "high-touch" interactions that must remain human led (e.g., delivering sensitive advice).

- Update standard client engagement letters to include transparent language about the firm's use of AI and other advanced technologies in service delivery.
- Closely monitor client satisfaction metrics and other relationship-focused Key Performance Indicators (KPIs) and treat any negative trend as a trigger to immediately review and adjust AI-related processes.

Supplemental Resources

Instructors may find the following resources helpful for facilitating this case study:

Returning to the Office and Leading Hybrid and Remote Teams by Dr. Gleb Tsipursky: This book provides practical insights into managing hybrid and remote teams effectively, offering strategies and frameworks that align closely with the challenges presented in this case study.

ChatGPT for Thought Leaders and Content Creators by Dr. Gleb Tsipursky: This book explores the integration of generative AI tools, providing a relevant perspective on leveraging AI in professional environments. Its insights will be especially useful in discussions around technology adoption in hybrid workplaces.

Articles on Mentorship and Hybrid Work Models: Relevant journal articles or industry reports on evolving mentorship structures and hybrid workplace strategies.

AI and Legal Industry Reports: White papers or research on AI adoption in law firms and professional services, such as those available through McKinsey & Company or the American Bar Association.

Bloom's Taxonomy for Learning Outcomes: To assist in writing effective learning outcomes, instructors can refer to Bloom's Taxonomy action verbs for clear guidance.

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Intercultural Communication for Remote and Hybrid Teams: A Case Study for Strategisoft

Kathy Richie, DM, MBA

In our global world, technology allows us to connect with virtual and hybrid teams that have been brought together for a common purpose. Using innovation and creativity, strategically assembling multicultural teams may enhance competitive advantage by combining cultural knowledge and decision-making skills. The potential for increasing cultural diversity awareness within an organization demonstrates a potential competitive advantage in the global marketplace. To maintain a high level of engagement, clear and succinct communication is required.

Strategisoft is a software company that specializes in strategic leadership with innovative software products. For several years, Strategisoft has focused on brand recognition in the

U.S high-tech market with the long-term goal of expanding to the global marketplace. The newest software product, Global Reach Software, is being overseen by a lead team manager who was chosen for her proven leadership skills. Her team is focused on the short-term goal of creating remote and hybrid teams made up of salespeople, software developers, and negotiators who are competent in their jobs. The team is also focused on understanding the expectations for work standards within their local country. Multiple geographic locations were identified for the internal staff working remotely or locally in a hybrid situation. Cultural awareness training is the first step to understanding cultural differences, using the five primary Hofstede culture dimensions and the web-based country comparison tool.

Introduction

Strategisoft is in the final stages of implementing their Global Reach Software after a recent period of beta testing by the development team. It is time to release this software, which is set to become the newest AI process tracking software for many industries. This is a highly anticipated event by the stakeholders of Strategisoft.

Sophia Zhang is the manager who has been selected to manage the team implementing the global rollout. She has been planning to bring her team together for training and strategic goal setting. Unfortunately, the CTO, Matt Brewer, also in-

interviewed for the highly visible position that was awarded to Sophia. While he is not visibly uncooperative, he has gained the internal support of the CEO to create a local team in one centralized location in the United States. Matt has quietly created a political wave of uncertainty. Sophia believes the best way to leverage the skill set of her sales and development support team is to seek out skills and experience regardless of geographic location.

The CEO, David Miller, has communicated a need for a written sales and support plan for the highly anticipated software that Sophia and Matt should be working on together to deliver within two short weeks. David met with Sophia and Matt to discuss the need for this project to be successful for the company to have a competitive advantage in the future. He maintains that Sophia will continue as manager of the core Global Reach product release team, and Matt will continue with data analytics and other data collected for decision making as the software licenses are sold to various companies. Everyone agrees that communication software tools will be an asset for communicating internally with employees and externally with customers.

Cultural Diversity as a Competitive Advantage

The benefit for Strategisoft is this new software product can easily be sold in a first phase to their established top 100 corporate accounts. The sales strategy for new customers will

be the second phase, which will focus on the testimonies of the established Strategisoft customer base. Ancillary services, such as consulting and customization of the software for the needs of the customer, will be a highly profitable services offering. Customer relationship management (CRM) software will be used to track the relationship-building sales efforts of Sophia's sales and support team.

Sophia understands the dynamics of digital leadership in creating a remote team from established employees and contract workers. Remote teams are a radical concept that, in a long-term setting, will dramatically alter conventional workplace norms (Asfahani, 2025). In this digital era, a critical skill set, competencies, and practices will be required to inspire and motivate individuals in remote locations. Sophia's rationale is that collaborative leadership should be an example for executives and policymakers to manage and lead teams globally.

Multiple methods can be used for communicating important information to the team, including written sources such as email. The first team is estimated to be made up of eight to ten people with the requisite skills and knowledge as subject matter experts, without the limitation of location. Live team communication will occur weekly using software such as Teams or Zoom. All agendas and slides will be part of a follow-up sent to all attendees after each meeting. In addition, Sophia plans to suggest one-on-one coaching and individual

progress reviews weekly for each team member to prepare and discuss progress. If sales create growth, the goal is to set aside a budget each year for the global team to meet live for strategic planning and goal setting.

Technology connects our world globally as a gig economy. The world of work has shown a trend towards an independent worker economy that follows this foundation to use specific skill set knowledge for contract workers to meet project goals within companies (Puig, 2024). The benefits of integrating the right skill set with the use of contract workers creates access to specialized talent and could be a true benefit for Sophia without a long-term commitment. Benefits and office space are not required, and individuals have greater autonomy. The gig economy represents a transformation of self-managed individuals who take personal responsibility to manage their time and professional development in a remote setting (Puig, 2024).

By using digital tools, the organizational culture needs leadership influence. Sophia will need to establish trust with all employees on her remote team. For a strong leader to have an impact on growth and retention, effective communication is needed to encourage employee engagement (Ebojoh & Hogberg, 2024). Clear communication must also include respect of boundaries and protection of proprietary company

information. Training will help the Global Reach software sales and support team, led by Sophia, to create a climate of learning and sharing.

It is important to monitor the progress on deliverables when there is a physical separation. A trusting leadership style without constant “eyes” on employees creates flexibility for shared tasks and the ability to interact and respond as needed. Building team spirit will increase team productivity and performance based on shared ideals. Trust will be negatively impacted if a conflict occurs affecting trust (Ebojoh & Hogberg, 2024), a fact of which Sophia will need to be constantly cognizant.

Cultural diversity must be recognized by organizations for remote and in-person teams. Acknowledging our differences is important for creating a values-based culture free of bias (Ketemaw et al., 2024). Diversity of thought is required for a diverse staff to overcome critical obstacles, beyond language barriers. The improvement of organizational performance has implications for solving problems and the ability to apply creative thinking. Reducing miscommunication increases the likelihood of developing positive cross-cultural relationships. Sophia must include a strategy to avoid miscommunications that could be caused by cultural differences in order for her remote team to thrive.

The Hofstede model is a solid strategy for Sophia to use as a cultural framework as it applies to different genders, ethnic groups, and social classes. Geert Hofstede conducted his life's work in the Netherlands, creating six different cultural dimensions as the general representation of culture. Many anthropologists, such as Hofstede, have divided cultures according to their methods of communicating. He completed cross-cultural research in over 150 countries throughout the span of his career. As far back as the 1970s, Hofstede created a large survey database for IBM with data collected from over 100,000 questionnaires. Key findings in the early years included leadership findings that were based more on culture than location. The problems he identified included:

- Dependence on management;
- Need for rules and structure;
- Balance between the individual goals and interdependence with the company; and
- Ego values such as financial needs, social values such as cooperation, and a good living situation.
- Hofstede studied the countries' differences and identified six dimensions:
- Power distance: Solutions for the inequality of human hierarchy in the community or workplace.

- **Uncertainty avoidance:** Ways that a society of people cope with uncertainty.
- **Individualism vs. collectivism:** Integration of individuals or collective teams for recognition of accomplishments.
- **Masculinity versus femininity:** Emotional descriptors for a society based on behaviors (e.g. cooperation versus aggressiveness).
- **Long-term versus short-term orientation:** Focus for the current and the future.
- **Indulgence versus restraint:** Gratification related to enjoying life (Hofstede, 2011).

Case Problem

Sophia Zhang must create a strong proposal to build a sales and support team for the CEO of Strategisoft to approve remote work of subject matter experts (SMEs). Her colleague, Matt Brewer, is also creating a proposal for an in-office sales and support team to meet the goals of selling the Global Reach software. Both leaders understand the senior leadership visibility and risk factors for success to meet the goals for the company's financial growth.

The managers will each have to prepare a written proposal for remote work (Sophia's team model) and brick and mortar

(Matt's team model). Sophia plans to focus on the succinct need for clear communication and use of other digital technologies. She also will focus on the multicultural benefits of using Hofstede's six cultural dimensions for success.

Next Steps

David Miller, the CEO of Strategissoft, will use the following questions as he evaluates the two proposals:

- Which proposal (remote or in-office) will make the best use of employee skills and experience to support the sale of Global Reach Software and build trust with customers?
- What does a SWOT (strengths, weaknesses, opportunities, and threats) analysis indicate for each proposal?
- Which proposal best represents the company's future direction toward global expansion?

Status Report

Sophia Zhang is the chosen leader for the global reach team. Matt Brewer will continue in his existing role as CTO of Strategissoft. It must be determined whether the best course of action is to create a remote sales and support team or to create a team that is centrally located in the company's location in the United States. The assumption is that careful consider-

ation will be given to multicultural diversity factors for success. Hofstede's country comparison tool will be one strong method to evaluate the dimensions of cultural differences in the workplace, which will apply to a remote or in-office team.

Conclusion

A competitive advantage is created through trust and collaboration with influence from organizational leaders. Creating remote and hybrid teams based on skills and talents strengthens the need for understanding and interacting effectively with diverse populations. The emphasis on cultural immersion for global teams highlights the transformative impact of enhancing empathy, adaptability, and the necessity of recognizing a cultural lens that affects perception and avoids personal bias. These strategies for all-work teams will contribute to cultural competency and open-mindedness.



Teaching Notes

Synopsis

This case focuses on the ethical dilemma of a company working to advance growth in the company while identifying the best work model (in-office, hybrid, or fully remote). The goal is to assemble a team with the skills and talents needed for developing and selling software in a global marketplace. It is

important the global expansion to increase market share is not based on an ethnocentric model that mimics the cultural standards of the United States in other non-U.S. countries. Instead, the right organizational model will need to be based on a geocentric model that views the global market as one single integrated and culturally centric market.

Purpose of the Case Study

The objectives of this case are to deepen understanding of the importance of cultural diversity awareness and the need to maintain consistent brand recognition in a multinational company. Culturally diverse work teams need to recognize local country culture, market conditions, and customer preferences for products and marketing. A foundation of open and flexible communication strategies should help reduce costs, encourage efficiencies, and improve employee retention. Staffing practices that draw from a broad talent pool will create an environment in which the best individuals for the job are hired, regardless of their ethnicity or nationality.

Learning Outcomes

It is common for high-tech companies to focus on the technical or hard skills of their employees to design and implement the products and services. Software design protocol is complex and requires innovative features to give the product a competitive edge, if even for a short period of time in the marketplace. Since these analytical and quantitative skills are

the priority for many high-tech organizations to survive, soft skills may be overlooked or given less priority. In order for a remote or hybrid work environment to be successful, the right blend of soft skills must be recognized to capitalize on the right people doing the right thing. People who work remotely must be confident and accountable, focused on communication of results to measure productivity.

By the end of this case, readers should be able to:

1. **Examine** leadership approaches that promote effective strategies for communicating across multicultural boundaries for remote and hybrid teams.
2. **Identify** personal communication skills for leading multicultural virtual and hybrid organizations.
3. **Develop** and **demonstrate** knowledge of the five Hofstede cultural dimensions.

Teaching Approach

A variety of organizations could use this case study, such as a learning and development department in a multi-national corporation or an undergraduate or graduate business course in higher education. The case applies most appropriately to a business setting focused on leadership and organizational culture principles and soft skills development. The case could be the basis for group or individual analysis in a face-to-face or asynchronous online class setting.

Discussion questions could be used to evaluate considerations for this potential real-world case problem.

Students or employees evaluating the case should be encouraged to complete a SWOT analysis to help with a final recommendation for creating a remote team or not in the case of Strategisoft.

Final recommendations could be presented to the class either through a recorded presentation or written paper.

Emphasis should be placed on thinking outside the box, with innovative solutions that may not be implied with the case summary.

Creativity is to be recognized with higher level thinking.

Discussion Questions

1. How could leadership at Strategisoft communicate the importance of the relationship between team diversity and an inclusive environment?
2. What are some initiatives that leadership could use to create open-mindedness for inclusivity and diverse teams?
3. What are some leadership considerations for the business model related to global expansion to the marketplace?

4. Should the model be hybrid, in-office, or strictly remote?

Suggested Solutions

1. To experience inclusion, individuals need to feel a sense of belonging so that each team member is treated as an insider. Each person should be able to freely express their unique cultural identities. Leaders must create an environment of trust. The first step would be to create training for the Hofstede cultural comparison tool. The next step would be to create teams to discuss the six cultural dimensions related to team member choices of different countries.
2. Leaders should encourage their culturally diverse teams to work together interdependently to arrive at creative solutions to complex problems. Recognizing this uniqueness requires open-mindedness in order for communication to be proactive and to avoid potential tensions between relational identities. Transformational leaders create a vision for the organization, and groups could work together to create this charter by drafting creative ideas of problem solving. Sharing, discussing, and utilizing perspectives should be documented with divergent ideas in group team-building sessions.

3. Employee-customer relationships should be explored through self-awareness training and modeling in groups. Cultural competencies are recognized through self-awareness and the understanding of others at an individual level, both in customer relationships and at the institutional level.
4. Leaders need to be aware of and evaluate issues such as proximity bias, which creates inequity between people who are in a brick-and-mortar office and those who work remotely. The in-office employees have more face-to-face time to share ideas informally. One solution is to have a daily video conference with all team members, regardless of location, to discuss current issues. Managing people remotely requires more intentional communication to keep everyone on the same page.

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Enterprise Consulting Group: Analysis of the Transfer to a Virtual Organization

Gary S. White, PhD

The rise of virtual organizations, driven by digital technology and globalization, poses both challenges and opportunities for leadership. This case study examines strategies for effective management in a virtual environment, focusing on communication, trust building, performance management, and fostering a positive organizational culture. As Enterprise Consulting Group transitioned to a fully virtual setup due to COVID-19, the company encountered significant issues including communication barriers, reduced team cohesion, and performance management difficulties. The leadership, led by founder James Campbell, faced challenges including asynchronous communication, loss of informal networks, and visibility of work. This case study high-

lights the comprehensive strategies needed to address these challenges and ensure success in a virtual organization.

Introduction

The advent of digital technology and the increasing globalization of business have fundamentally reshaped how organizations operate. One of the most significant developments in this new landscape is the rise of virtual organizations. These entities function without a centralized physical location, relying heavily on digital communication tools to connect employees who may be dispersed across various geographical locations. This shift presents a unique set of challenges and opportunities for leaders who must navigate the complexities of managing remote teams. This case study explores how leaders can effectively lead employees in a virtual organization, focusing on critical areas such as communication, trust building, performance management, and fostering a positive organizational culture.

Background

Enterprise Consulting Group, a small business consulting company in the United States, faced a pivotal moment in 2020 when leadership decided to transition to an entirely virtual organization. The move was driven by the COVID-19 pandemic, which forced many businesses to rethink their traditional operating models. The company's leadership recognized the potential benefits of a virtual setup, including

increased flexibility, reduced overhead costs, and the ability to attract talent from a broader geographical area. However, they were also acutely aware of the challenges that would come with this shift. Maintaining productivity, engagement, and collaboration among employees spread across different time zones was no small task. This case study examines the strategies that Enterprise Consulting Group's leaders could implement to address these challenges and ensure the success of the virtual organization.

The Shift to Virtual

The transition to a fully virtual organization was not a decision taken lightly by Enterprise Consulting Group's leadership. The leadership team, headed by company founder James Campbell, faced an unprecedented situation brought on by the COVID-19 pandemic, prompting him to carefully consider both immediate and long-term implications for the company's operations. On the one hand, there was an urgent need to ensure the health and safety of employees, which meant minimizing physical interactions and adhering to social distancing guidelines. On the other hand, Campbell and his fellow leaders were acutely aware of the potential challenges that a virtual environment could introduce, including communication breakdowns, reduced team cohesion, and difficulties in performance management.

One of the most immediate challenges was the emergence of communication barriers. In a physical office, employees rely heavily on informal interactions to share information and solve problems quickly. The virtual environment, however, necessitated a shift to digital communication tools such as emails, instant messaging, and video conferencing. This transition led to several issues:

- **Asynchronous communication:** Different time zones and varying work schedules caused delays in responses and created misunderstandings.
- **Reduction of non-verbal cues:** The lack of face-to-face interaction among employees limited the ability to convey and interpret non-verbal cues, leading to miscommunication.
- **Technical difficulties:** Inconsistent internet connections and unfamiliarity with new software tools further hampered effective communication.

Campbell also noted a reduction in team effectiveness. The physical separation of team members led to a noticeable decline in team cohesion. Employees reported feelings of isolation and detachment from their colleagues and the organization as a whole. The absence of daily social interactions and team-building activities contributed to this issue:

- **Loss of informal networks:** Spontaneous hallway conversations and casual office interactions, which played a vital role in fostering relationships, were lost.
- **Decreased collaboration:** Virtual meetings often felt formal and rigid, lacking the fluidity and spontaneity of in-person discussions. This hindered collaborative efforts.
- **Employee well-being:** The lack of social support and increased stress of adjusting to remote work negatively impacted employee morale and mental health.

Performance management also became more challenging in the virtual setting at Enterprise Consulting Group. Managers struggled to effectively monitor and evaluate employee performance without the direct oversight they were accustomed to:

- **Visibility of work:** The lack of physical presence made it difficult for managers to gauge productivity and assess the quality of work.
- **Setting clear expectations:** Without regular in-person check-ins, employees often felt uncertain about their responsibilities and performance expectations.

- **Feedback mechanisms:** Providing timely and constructive feedback was more challenging, as virtual feedback sessions lacked the immediacy and personal touch of face-to-face conversations.

Recognizing the gravity of these considerations, the leadership team, led by Campbell, undertook a comprehensive analysis of the pros and cons of transitioning to a virtual organization. Many operational factors needed to be evaluated.

The Issues

One of the first significant considerations was an overhaul of the company's communication strategy. In a traditional office setting, most communication happens informally. Colleagues chat by the watercooler, share quick updates in the hallway, and resolve issues spontaneously. In the absence of a physical office, these informal exchanges were lost, leading to fragmented communication. Misunderstandings became more frequent as employees struggled to convey their messages clearly through digital channels. The lack of face-to-face interaction also meant that non-verbal cues, which play a crucial role in effective face-to-face communication, were often missed.

Without the benefit of face-to-face interactions, the leadership understood the importance of establishing clear and frequent communication channels. The big question, however, was how to accomplish this. The loss of informal, sponta-

neous interactions that typically occur in an office setting meant that employees had to be more intentional about staying connected.

Another critical aspect of the transition was maintaining oversight and control over employee performance. The leadership recognized that traditional performance management practices often relied on physical presence. Therefore, direct supervision needed to be reimagined for a virtual context. Measuring productivity and performance is inherently more complex in a virtual setting. In a traditional office, leaders can monitor employees' work habits and output more directly. In a virtual environment, this visibility is reduced, making it challenging to assess performance accurately. Leaders had to develop new metrics and methods for tracking productivity without micromanaging employees or infringing on their autonomy.

Additionally, leadership needed to discover ways to build trust and accountability within the virtual environment. Trust is a critical component of any successful team and building and maintaining it in a virtual environment presented a significant challenge. Without direct supervision, leaders were concerned about accountability and whether team members were fully engaged with their work. The physical distance made it difficult to gauge the effort and commitment of employees, leading to a potential erosion of trust. Leadership needed to find new ways to build and sustain trust to ensure a cohesive and productive team.

Furthermore, one of the unintended consequences of moving to a virtual setup was the dilution of the company's culture. Enterprise Consulting Group had built a vibrant and cohesive culture over the years, but the physical separation of employees threatened to erode this sense of community. Maintaining team spirit and ensuring that employees felt connected to the company's values and each other became a top priority for the leadership team. In the latest employee survey, over 75% of employees reported they did not feel a sense of community within the company and among the employees. The transition to virtual work significantly impacted Enterprise Consulting Group's culture. Several employees have pointed out that the absence of physical presence has eliminated the spontaneous interactions and camaraderie that often strengthen team bonds. Employees quickly discovered that virtual environments challenge traditional cultural norms, leading to potential miscommunication and a sense of isolation. Moreover, the lack of face-to-face engagement hindered reinforcing shared values and practices. Campbell realized that a cohesive company culture required intentional efforts to foster connection, such as regular virtual meetings, team-building activities, and transparent communication. Thus, while virtual work offers flexibility, it necessitates strategic initiatives to effectively preserve and nurture company culture. The leadership team needed to find a workable solution.

Time Zone Challenges

Time zone differences significantly challenged the management of the virtual workplace at Enterprise Consulting Group, creating various obstacles to seamless communication and collaboration. In a globalized workforce, employees are spread across different continents, making synchronous communication difficult. This disparity in working hours led to delays in decision-making and project timelines as team members waited for overlapping work hours to discuss and resolve issues. One major challenge was scheduling meetings. Finding a convenient time for all participants was arduous, often resulting in early morning or late-night meetings for some team members. This affected employees' work-life balance and led to fatigue, reducing overall productivity and job satisfaction. Additionally, the asynchronous nature of communication often led to misunderstandings and a lack of immediate feedback, which slowed down workflows and caused frustration among team members.

Moreover, time zone differences created a sense of isolation for remote workers who felt disconnected from their colleagues. Campbell was concerned that this could impact team cohesion and the overall sense of belonging within the organization. The leadership team needed to find a way to mitigate these challenges.

Work-Life Balance

The company's shift to a virtual work environment introduced significant challenges to work-life balance. One of the primary negative effects was the blurring of boundaries between work and personal life. In a virtual setting, employees often find it difficult to delineate work hours from personal time, leading to overwork and burnout. Some employees began to complain the constant connectivity enabled by digital communication tools meant that employees were often expected to be available outside traditional working hours, disrupting personal routines and reducing time for rest and leisure.

Moreover, the absence of physical office space eliminated the natural transition between home and work. This lack of separation can create a pervasive sense of always being "on," contributing to stress and anxiety. Additionally, virtual work environments can lead to feelings of isolation and disconnection from colleagues, exacerbating mental health issues. The lack of social interaction and support can diminish job satisfaction and motivation.

Another negative effect was the potential for an unhealthy work environment at home. Some employees felt that they were working in unsuitable conditions without a designated workspace, leading to physical discomfort and strain. Furthermore, balancing household responsibilities with profes-

sional duties can increase stress, particularly for those with caregiving responsibilities.

Therefore, the transition to a fully virtual organization by Enterprise Consulting Group was a complex and multifaceted process. It required careful planning, significant adjustments, and a focus on maintaining effective communication, oversight, and trust. By addressing these challenges head-on, the company hoped to navigate the transition successfully and position itself for continued success in the evolving business landscape. For the leadership team, the experience highlighted the importance of proactive leadership and the willingness to adapt in the face of unprecedented challenges. However, they were very open to suggestions for improvement.

Case Problem

You have been hired as an expert outside consultant to advise Campbell and his management team regarding effective strategies for mitigating the issues associated with the transition to a virtual environment. Your task is to recommend strategies for effective leadership at Enterprise Consulting Group that CEO Campbell can implement with his leadership team. Specifically, consider what you would recommend for some of the following issues that face the organization:

- Communication and digital communication tools
- Communication frequency and clarity
- Overcoming time zone challenges
- Trust building
- Transparency and accountability
- Holding regular one-on-one meetings
- Team-building activities
- Performance management strategies
- How to set clear goals and expectations
- Continuous feedback and recognition
- Utilizing performance metrics
- Fostering a positive organizational culture
- Emphasizing core values
- Promoting work-life balance
- Encouraging professional development

Conclusion

The rise of digital technology and globalization has fundamentally reshaped organizational operations, with virtual organizations emerging as a significant development. This case study of Enterprise Consulting Group highlights the complexities of transitioning to a virtual setup driven by the COVID-19 pandemic. Leaders must navigate communication barriers including reduced team cohesion, and performance management challenges to maintain productivity, engagement, and collaboration. Effective strategies include investing in advanced communication tools, fostering virtual team-building activities, and providing ongoing support and training. By addressing these challenges, organizations can leverage the benefits of a virtual environment, such as increased flexibility and the ability to attract diverse talent, ensuring long-term success in the digital age.



Teaching Notes

Synopsis

When Enterprise Consulting Group transitioned to a fully virtual setup, the company faced significant issues such as communication barriers, reduced team cohesion, and performance management difficulties. Leadership encountered challenges including asynchronous communication, loss of

informal networks, and visibility of work. This case explores comprehensive strategies required for effective management in a virtual environment, emphasizing communication, trust-building, performance management, and cultivating a positive organizational culture.

Purpose of the Case Study

The purpose of this case is to help students understand the challenges faced by leadership, including communication barriers, reduced team cohesion, and performance management difficulties, and to present comprehensive strategies to address these challenges and ensure success in a virtual organization.

Learning Outcomes

By the end of this case, readers should be able to:

1. **Develop** the ability to critically analyze challenges to change that leaders face and identify effective methods for communicating change to employees.
2. **Identify** the leadership skills needed to successfully navigate times of change within the organization.
3. **Evaluate** strategies to transition an organization successfully into a virtual environment.

Teaching Approach

This case study can apply to a wide variety of organizations, including for-profit and nonprofit organizations. It is also suitable in both on-ground and online classroom settings. Conducting a case study analysis in a classroom setting can be highly effective in developing students' critical thinking and problem-solving skills. Here are several suggestions:

1. **Verify relevance:** Ensure that the case study is pertinent to the course material and relatable to the student's experiences or future career paths. This enhances engagement and applicability.
2. **Provide clear instructions:** Clearly outline the objectives, expectations, and assessment criteria for the case study analysis. This ensures students understand what is required of them.
3. **Encourage group work:** Form small groups to analyze the case study. Collaborative analysis promotes diverse perspectives and fosters teamwork.
4. **Facilitate guided discussions:** After group analysis, hold a class discussion to compare findings and interpretations. This encourages critical thinking and allows students to learn from each other.
5. **Use real-world scenarios:** Emphasize current industry challenges or historical events related to lead-

ership challenges in the virtual environment. This makes the analysis more relevant and engaging.

6. **Integrate multimedia:** Use videos, articles, and interactive tools to supplement the case study. This can enhance understanding and maintain interest.
7. **Encourage role playing:** Have students assume different roles (e.g., CEO, customer, employee) to analyze the case study from various perspectives. This can deepen their understanding of the issues involved.
8. **Provide feedback:** Offer constructive feedback on the students' analyses, highlighting strengths and areas for improvement. This helps students refine their analytical and leadership skills.
9. **Reflect and summarize:** Conclude with a reflection session when students can summarize key learnings and discuss how they can apply these insights in real-world contexts.

These strategies can create a dynamic and effective learning environment for case study analysis.

Suggested Solutions

Six strategies that Enterprise Consulting Group should consider:

Step 1: Establishing a digital infrastructure—Establishing a robust digital infrastructure is the first step in transitioning to a fully virtual organization. Enterprise Consulting Group should invest in high-quality communication tools and ensure that all employees can access reliable internet connections and the necessary hardware. This foundational investment was critical for seamless communication and collaboration.

Step 2: Redefining roles and expectations—Leaders should work with employees to redefine roles and set clear expectations. This involves updating job descriptions to reflect the new virtual work environment and establishing performance metrics focusing on outcomes rather than hours worked. Employees should be empowered to take ownership of their tasks and given flexibility to manage their schedules.

Step 3: Implementing regular check-ins and feedback mechanisms—Regular check-ins need to be implemented to maintain connection and provide support. Managers should schedule weekly one-on-one meetings with their team members to discuss progress, address challenges, and provide feedback. Additionally, monthly team meetings and quarterly performance reviews should be conducted to ensure alignment with company goals.

Step 4: Enhancing team cohesion through virtual activities—Enterprise Consulting Group can introduce vir-

tual team-building activities to foster a sense of community and team spirit. These activities can range from virtual coffee breaks and online games to more structured team-building exercises. These initiatives will help employees build relationships and stay connected despite the physical distance.

Step 5: Prioritizing professional development—Recognizing the importance of continuous learning, the company should offer various professional development opportunities. Employees will be encouraged to attend virtual workshops, webinars, and industry conferences. This not only enhances their skills but also keeps them engaged and motivated.

Step 6: Promoting work-life balance and well-being—Leaders should implement policies to support work-life balance, such as flexible working hours and mental health days.

Additional Recommended Strategies for Effective Leadership in a Virtual Organization

Communication—Effective communication is the cornerstone of successful virtual leadership. In a traditional office, much of the communication happens informally, but in a virtual setting, intentional strategies must be implemented to facilitate clear and frequent communication.

Digital communication tools—Enterprise Consulting Group could leverage digital communication tools to bridge

the physical gap. Platforms like Slack for instant messaging, Zoom for video conferencing, and Trello for project management became essential. The choice of tools is crucial; they must be user-friendly, reliable, and capable of supporting synchronous and asynchronous communication. Ensuring that all employees were comfortable using these tools was a key part of the transition process.

Communication frequency and clarity—Regular check-ins and clear communication protocols should be established to ensure everyone is on the same page. Daily stand-up meetings, weekly team meetings, and monthly all-hands meetings can be scheduled to keep everyone aligned. Each meeting must have a clear agenda, and follow-up notes should be shared to maintain transparency and accountability. This structured approach will help prevent communication breakdowns initially plaguing the virtual setup.

Overcoming time zone challenges—With employees spread across different time zones, scheduling meetings becomes a significant challenge. Enterprise Consulting Group could adopt a flexible approach, rotating meeting times to accommodate different time zones and ensuring that all key information is documented and accessible asynchronously. This flexibility can help ensure that all employees felt included and valued, regardless of their location.

Trust building—Building trust in a virtual environment requires deliberate effort. Trust is foundational to team cohesion and productivity, and it can be more challenging to foster without face-to-face interactions.

Transparency and accountability—Leaders at Enterprise Consulting Group should emphasize transparency in their communications and decision-making processes. By openly sharing information about company performance, strategic goals, and individual roles, leaders can build a culture of trust and mutual respect. Regular updates and open forums for discussion allow employees to feel informed and involved in the company's direction.

Regular one-on-one meetings—Managers should hold regular one-on-one meetings with their team members to provide personalized support, gather feedback, and address concerns. These meetings are crucial for building strong relationships and understanding individual needs and motivations. They provide a platform for employees to voice their thoughts and for managers to offer tailored guidance and support.

Team-building activities—Virtual team-building activities can be organized to strengthen interpersonal connections. These include virtual coffee breaks, online games, and team-building exercises, allowing employees to bond and build trust outside work-related tasks. These activities would

help create a sense of camaraderie and reinforce the company's culture and values.

Performance management—Effective performance management in a virtual organization requires clear expectations, continuous feedback, and a focus on outcomes rather than processes.

Setting clear goals and expectations—Enterprise Consulting Group could implement a goal-setting framework that aligns individual objectives with company goals. Clear performance expectations could be established, and employees could be given the autonomy to manage their work within those parameters. This approach would empower employees to take ownership of their tasks and contribute to a sense of accountability and motivation.

Continuous feedback and recognition—Regular feedback loops should be established to ensure continuous improvement. Managers should provide constructive feedback during regular check-ins and recognize achievements publicly to motivate and engage employees. This focus on continuous feedback helps maintain high-performance standards and encourages a culture of learning and growth.

Utilizing performance metrics—Data-driven performance metrics can be used to assess productivity and outcomes. These metrics provide an objective basis for performance evaluations and help identify areas for improvement.

Leaders could make informed decisions about resource allocation and strategic priorities by focusing on measurable outcomes.

Fostering a positive organizational culture—Creating a positive organizational culture in a virtual setting involves promoting employees’ sense of belonging, purpose, and shared values.

Emphasizing core values—Enterprise Consulting Group’s leadership can reinforce the company’s core values in all communications and decision-making processes. These values serve as a guiding principle for organizational behavior and interactions. By consistently highlighting and rewarding behaviors aligned with the company’s values, leaders ensure that the culture remains strong and cohesive.

Promoting work-life balance—Leaders recognize the importance of work-life balance and implement policies to support it. Flexible working hours, mental health days, and encouraging employees to take regular breaks help prevent burnout and maintain overall well-being. Leaders can create a supportive and sustainable work environment by prioritizing employee well-being.

Encouraging professional development—Opportunities for professional development should be prioritized to foster growth and engagement. Online training programs, virtual workshops, and access to industry conferences can be offered

to help employees expand their skills and knowledge. This investment in professional development enhances employee capabilities and contributes to job satisfaction and retention.

Supplemental Resources

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Building Employee Engagement at Tech Solutions, Inc.

Maranda Johnson-Hartzog, MS ODL

Tech Solutions, Inc., a mid-sized technology company specializing in software development and IT consulting, has faced a decline in employee engagement following a major restructuring effort. Initially thriving on a culture of innovation and collaboration, the company implemented a hierarchical leadership model in 2022 to streamline operations. However, this restructuring led to unintended consequences, including decreased employee autonomy, communication breakdowns, and lower job satisfaction. These challenges have resulted in an increased turnover and a noticeable drop in engagement scores among employees.

The key stakeholders in this case include CEO John Smith, who prioritizes expansion and operational efficiency; HR manager Susan Lee, who is responsible for employee rela-

tions and retention; team leaders who bridge the gap between leadership and employees; and the employees themselves, who have been directly impacted by these organizational shifts. The restructuring limited employee input in decision making, contributing to dissatisfaction and weakening morale. Employees expressed concerns about transparency, motivation, and career development, signaling a disconnect between leadership's vision and the workforce's needs.

Recognizing the urgency of the situation, company leadership sought advice from an organizational behavior expert. The expert identified the restructuring's negative impact on engagement and emphasized the importance of shifting toward a transformational leadership model. The expert's recommendations included empowering employees through leadership development programs, enhancing communication channels to improve transparency and trust, increasing autonomy in decision-making to restore innovation, and reinforcing a company culture that aligns with employees' values.

To address these issues, Tech Solutions, Inc. must implement changes that prioritize employee engagement. Those analyzing this case will have the opportunity to weigh in on the strategic changes that will best help Tech Solutions, Inc. engage employees by evaluating different leadership approaches, communication improvements, and cultural initiatives. They will consider how increasing employee autonomy, fos-

tering transparency, and promoting a collaborative work environment can drive engagement and retention. Through this analysis, those examining the case can develop an action plan that aligns with best practices in organizational behavior and supports long-term success.

This case highlights the significance of leadership, communication, and organizational culture in maintaining employee engagement. By implementing strategic changes, Tech Solutions, Inc. can create a more motivated and committed workforce, ultimately improving both employee satisfaction and organizational performance.

Introduction

Employee engagement is a significant factor in an organization's success, influencing productivity, retention, and overall job satisfaction. Tech Solutions, Inc., a mid-sized technology company specializing in software development and IT consulting, has faced declining employee engagement following an organizational restructuring. This case study examines the root causes of disengagement and explores leadership, communication, and cultural strategies to re-engage employees and improve organizational performance.

Context

Founded in 2010, Tech Solutions, Inc. has grown to a workforce of 150 employees, including software engineers, project

managers, and support staff. The company initially thrived due to a strong culture of innovation and collaboration. However, in 2022, a restructuring initiative aimed at streamlining operations introduced a more hierarchical leadership model, resulting in unintended consequences such as reduced employee autonomy, weakened communication, and declining job satisfaction. Following the restructuring, the company also adopted a hybrid work model to support flexibility. While remote work provided autonomy and work–life balance benefits, it also introduced challenges related to communication, team cohesion, and employee engagement.

Key Stakeholders

- CEO John Smith—A visionary leader focused on expansion and operational efficiency.
- HR manager Susan Lee—Oversees employee relations, recruitment, and retention strategies.
- Team leaders—Manage daily operations and serve as intermediaries between leadership and employees.
- Employees—Software engineers, project managers, and support staff directly impacted by leadership decisions and organizational culture shifts.

Organizational Restructuring

In 2022, Tech Solutions, Inc. transitioned to a hierarchical structure, resulting in the following:

- Limited employee input in decision-making.
- A surge in resignations, particularly among high-performing employees: increased turnover signaled dissatisfaction.
- Declining engagement scores: employee surveys revealed lack of motivation and concerns over career development.

Current Challenges

Tech Solutions, Inc. faces four primary challenges affecting employee engagement:

- Reduced employee autonomy: Employees feel disempowered due to centralized decision-making, limiting creativity and innovation.
- Communication breakdown: A widening gap between leadership and employees has led to a lack of transparency, reducing trust and morale.
- Low job satisfaction: Increased control and reduced collaboration opportunities have diminished job fulfillment.

- Misalignment in leadership style: The CEO's transactional approach prioritizes efficiency but lacks the motivational elements of transformational leadership.
- The shift to hybrid work has made it more difficult to maintain consistent communication and connection among teams, amplifying disengagement issues.

Professional Insight

Recognizing the urgency of Tech Solutions, Inc.'s declining employee engagement, company leadership sought insight from a highly respected professor with expertise in organizational behavior and leadership. The professor's assessment reinforced that the company's restructuring, while intended to drive efficiency, inadvertently created disengagement by limiting employee autonomy, reducing transparency, and weakening the company's once-strong culture of collaboration.

The professor emphasized that leadership plays a pivotal role in reversing these trends and advocated for a shift toward a transformational leadership model, which fosters empowerment, open communication, and shared purpose. Addition

ally, the expert stressed the importance of restoring autonomy, improving communication channels, and realigning the company's culture with employee values to rebuild engagement and performance.

With these expert insights in mind, current leadership believes the below solutions and recommendations provide a strategic roadmap to address Tech Solutions' challenges. By implementing these evidence-based strategies, the company can create an environment in which employees feel valued, motivated, and committed to long-term success:

- **Adopt transformational leadership:** The CEO and other leaders should shift toward a transformational leadership style that emphasizes employee empowerment, collaboration, and shared vision. This can be achieved through leadership development programs and regular communication with employees to align organizational goals with their aspirations (Colquitt et al., 2024).
- **Enhance communication channels:** Improving communication between management and employees is crucial for rebuilding trust and transparency. Implementing regular town hall meetings, feedback sessions, and open-door policies can help bridge the communication gap and ensure that employees feel heard and valued.

- **Increase employee autonomy:** To enhance job satisfaction, Tech Solutions should consider decentralizing decision-making processes and allowing employees greater autonomy in their roles. This could involve empowering teams to make decisions related to their projects and encouraging innovation and creativity.
- **Strengthen organizational culture:** Rebuilding a strong organizational culture that aligns with employees' values is essential for increasing engagement. This can be achieved by involving employees in the development of the company's mission and values, as well as recognizing and celebrating achievements that reflect these values.

The case of Tech Solutions, Inc. highlights the impact of leadership, communication, and culture on employee engagement. By transitioning to a transformational leadership model, improving communication, restoring autonomy, and reinforcing a positive culture, the professor believes the company can rebuild engagement and improve overall performance.

Theoretical Analysis

The challenges at Tech Solutions, Inc. can be analyzed through various leadership, motivation, and organizational culture theories. Transformational leadership, as proposed by Bass (1990), emphasizes motivation and engagement by fos-

tering a shared vision, providing support, and empowering employees. Shifting from the company's current transactional leadership approach to a transformational one can significantly enhance employee commitment and morale. Similarly, servant leadership (Greenleaf, 1977) prioritizes the needs of employees, encourages trust, and creates a supportive work environment, which could help address the company's declining engagement levels.

From a motivational perspective, Hackman and Oldham's (1976) job characteristics model highlights autonomy, skill variety, and feedback as critical components of job satisfaction and engagement. Tech Solutions' restructuring has diminished employee autonomy and communication, failing to meet these core job dimensions. Additionally, Deci and Ryan's (1985) self-determination theory identifies autonomy, competence, and relatedness as fundamental to motivation. Restoring employee control over their work, fostering professional growth, and strengthening team collaboration could help rekindle engagement and job satisfaction.

In terms of organizational culture, Cameron and Quinn's (1999) competing values framework suggests that Tech Solutions has shifted from a clan culture—characterized by collaboration and employee focus—to a hierarchy culture, which prioritizes control, efficiency, and structure. This shift has contributed to resistance and disengagement among employees. Rebalancing the culture by reintroducing elements

of flexibility, employee empowerment, and open communication can help realign the company's values with workers' expectations, improving overall morale.

Conclusion

Tech Solutions, Inc. stands at a critical juncture. The restructuring initiative, while driven by a desire for operational efficiency, inadvertently undermined the company's collaborative culture and employee morale. A shift from a transactional to a transformational leadership style—along with efforts to increase transparency, restore autonomy, and realign company values with employee expectations—is essential in both in-office and hybrid work environments. Implementing these changes will not only rebuild trust and engagement but also position Tech Solutions for long-term success by fostering a motivated and innovative workforce. Organizational behavior principles such as transformational leadership, self-determination theory, and the job characteristics model provide a strong foundation for driving this transformation.



Teaching Notes

Synopsis

Tech Solutions, Inc., a mid-sized technology company specializing in software development and IT consulting, has

been facing declining employee engagement following an organizational restructuring. Initially a company that thrived on innovation and collaboration, the restructuring led to a more hierarchical leadership model, which inadvertently resulted in reduced employee autonomy, weakened communication, and decreased job satisfaction. As a result, the company has experienced increased turnover, disengaged employees, and misalignment between leadership styles and employee expectations.

This case study requires students to analyze the factors contributing to employee disengagement, explore leadership and motivation theories, and propose solutions to rebuild engagement. Students will assess organizational behavior principles, including transformational leadership, communication strategies, and workplace autonomy, to develop recommendations for improving engagement at Tech Solutions, Inc.

Purpose of the Case Study

The purpose of this case study is to explore the causes and consequences of declining employee engagement at Tech Solutions, Inc. following a restructuring that introduced a hierarchical leadership model. By analyzing leadership styles, communication challenges, and cultural shifts, the case aims to help readers understand the role of transformational leadership, employee autonomy, and organizational culture in

fostering engagement. The case is intended to help develop analytical, strategic, and leadership skills in diagnosing organizational behavior problems and formulating actionable engagement solutions aligned with best practices.

Learning Outcomes

This case study is designed to help students develop leadership, communication, and analytical skills related to organizational behavior and employee engagement. By the end of this case, readers should be able to:

1. **Understand** the impact of leadership styles on employee engagement and organizational culture.
2. **Analyze** the role of communication in employee motivation, trust, and performance.
3. **Develop** strategic recommendations to improve workplace engagement and organizational effectiveness.

Teaching Approach

This case study is versatile and can be adapted for multiple learning formats. In an in-class discussion or small-group activity, students can be divided into small groups to analyze the case and answer key discussion questions. Each group presents their findings, followed by a class-wide discussion to explore different perspectives and solutions.

For asynchronous online learning, students can submit a written response analyzing the case, ensuring they engage with the material independently. Additionally, as an option, students may create an infographic or a brief presentation to visually summarize their recommendations, promoting creativity and critical thinking in their analysis.

Discussion Questions & Tips for Resolution

1. What leadership challenges contributed to the decline in employee engagement at Tech Solutions, Inc.?
 - The main challenge was the adoption of a hierarchical and transactional leadership style, which reduced empowerment, limited communication, and disconnected leadership from employees' needs.
2. How has the shift from a collaborative to a hierarchical structure impacted morale and productivity?
 - It led to decreased autonomy, created communication barriers, and diminished innovation, resulting in low morale and a drop in productivity.
3. How does the CEO's leadership style contribute to the issue?

- The CEO's transactional style prioritizes efficiency over employee development, limiting inspiration, motivation, and emotional connection with staff.
4. How can Tech Solutions, Inc. rebuild trust and transparency within the company?
- By establishing open communication channels, holding regular town halls, involving employees in decision-making, and ensuring leadership accountability, Tech Solutions, Inc. can rebuild trust and transparency.
5. What communication strategies should leadership implement to bridge the gap between employees and management?
- Leadership should implement regular feedback loops, anonymous suggestion platforms, and two-way communication systems that encourage employee voice.
6. How can employee feedback be integrated into decision-making?

- This can be accomplished through structured forums like employee councils, regular surveys with follow-up actions, and collaborative decision-making models at the team level.
7. What role does autonomy play in employee engagement?
- Autonomy empowers employees, increases intrinsic motivation, enhances job satisfaction, and supports innovation.
8. How does a lack of autonomy impact innovation and motivation?
- It stifles creativity, creates feelings of powerlessness, and reduces employees' willingness to go beyond basic job expectations.
9. What strategies can be used to restore autonomy while maintaining organizational efficiency?
- Strategies include delegating decision-making authority within teams, implementing agile work methods, and allowing employees to set goals aligned with organizational priorities.
10. Which motivational and leadership theories can be applied to improve employee engagement?

- Transformational leadership, self-determination theory, and the job characteristics model all offer frameworks for boosting engagement and motivation.
11. How can transformational leadership create a more engaged workforce?
- By inspiring a shared vision, fostering trust, encouraging professional growth, and recognizing individual contributions.
12. How do motivation theories (e.g., job characteristics model, self-determination theory) inform engagement strategies?
- These theories stress the importance of autonomy, meaningful work, competence, and relatedness, all of which are central to designing engaging work environments.
13. What concrete steps should Tech Solutions, Inc. take to improve its organizational culture?
- Tech Solutions, Inc. should reintroduce collaboration practices, celebrate team successes, involve employees in shaping company values, and shift back toward a clan culture.

14. How can leaders ensure alignment between company values and employee expectations?
- Leaders can ensure this by engaging employees in defining core values, communicating those values clearly, and embedding them into performance evaluations and reward systems.
15. What role do rewards and recognition play in rebuilding engagement?
- Recognition fosters a sense of value and belonging, while both intrinsic and extrinsic rewards enhance motivation and reinforce desired behaviors.
16. How does remote or hybrid work influence engagement, communication, and leadership effectiveness at Tech Solutions, Inc.?
- Remote and hybrid work increase flexibility and autonomy but create challenges for communication and connection, requiring leaders to foster transparency, inclusion, and regular virtual engagement to maintain trust and collaboration.

Suggested Solutions

To address the challenges at Tech Solutions, Inc., students should consider the following evidence-based solutions and

discuss why they are or are not the best for Tech Solutions, Inc.

1. Shift to transformational leadership: Leaders should inspire and empower employees through a shared vision rather than a sole focus on efficiency and control. Training programs for leadership should emphasize motivational leadership and employee development.
2. Enhance communication channels: Introduce regular town hall meetings, feedback sessions, and open-door policies to encourage transparent communication. Implement an internal platform where employees can share ideas and concerns anonymously.
3. Increase employee autonomy: Decentralize decision-making by allowing teams greater control over their projects. Provide opportunities for employees to innovate and take ownership of initiatives.
4. Strengthen organizational culture: Reestablish the company's core values and involve employees in defining the company's mission. Recognize employee contributions through awards, bonuses, and non-monetary incentives such as career development opportunities.

5. Strengthen hybrid and remote engagement: leaders should leverage digital collaboration platforms, establish regular virtual check-ins, and create inclusive recognition systems that reach all employees regardless of location.

This case study provides an opportunity to analyze real-world organizational challenges related to leadership, communication, and engagement. By applying leadership theories and motivational models, students can develop actionable solutions that align with best practices in organizational behavior. The goal is to help students think critically about leadership effectiveness and employee motivation, preparing them to apply these insights in future managerial or leadership roles.

Activity

Objective: Create an action plan for improving employee engagement at Tech Solutions, Inc.

Instructions

Step 1: Reflect to Understand Engagement

Before addressing Tech Solutions' issues, reflect on your own experiences with workplace engagement. Answer the following questions:

- Have you ever felt highly engaged or disengaged in a job, school project, or team activity?

- What factors contributed to your motivation or lack thereof?
- How did leadership, communication, and autonomy affect your level of engagement?

Step 2: Diagnose the Issues

Based on the case study and solutions proposed by the highly regarded professor, analyze the following engagement challenges at Tech Solutions, Inc.:

- **Reduced employee autonomy:** What are the risks of limiting autonomy at a company that values innovation? How might increased autonomy improve job satisfaction and performance?
- **Communication breakdown:** What are the potential consequences of poor communication between leadership and employees? What methods could improve transparency and trust in the organization?
- **Low job satisfaction:** What impact does job satisfaction have on productivity and turnover? What factors influence job satisfaction at a technology company?

- **Leadership misalignment:** How does the CEO's transactional leadership style contribute to disengagement? What leadership strategies could be implemented to inspire and empower employees?

Step 3: Create an Engagement Action Plan

Now that you have identified the core issues, develop a strategic action plan to improve engagement at Tech Solutions, Inc. Address the following:

1. Recommend leadership changes (if needed).
2. Propose ways to improve transparency and employee feedback loops.
3. Suggest policies to empower employees and encourage creativity.
4. Develop an approach to shift the company culture back toward collaboration and employee-focused values.

Step 4: Apply the Concepts to Your Own Situation

Reflect on your findings and consider how these concepts apply to your own personal or professional experiences. Answer the following:

- What leadership and communication strategies from your action plan could be applied to improve

engagement in your own workplace, school, or organization?

- How can you take an active role in fostering engagement in a group or team you are part of?

Assignment Components

Students will engage in three key tasks to reinforce their understanding of employee engagement and organizational effectiveness.

- **Case study analysis:** Examine the organizational restructuring at Tech Solutions, Inc. and identify the primary factors contributing to declining employee engagement. Analyze the leadership style, communication breakdowns, and cultural shifts that have negatively impacted employee motivation and satisfaction. Apply relevant leadership and motivation theories to assess how the company's challenges could be addressed.
- **Strategic engagement proposal:** Develop a detailed strategy to improve employee engagement at Tech Solutions, Inc., incorporating leadership adjustments, communication enhancements, and cultural realignment. Recommend concrete steps to transition leadership from a transactional to a transformational approach, emphasizing empowerment and

trust building. Propose initiatives such as leadership training, feedback loops, decentralized decision making, and improved employee recognition programs.

- **Personal reflection and application:** Reflect on personal experiences with workplace engagement or disengagement. Identify lessons from the case study that could be applied to personal or professional environments. Explore how transformational leadership and motivational strategies can be leveraged to foster engagement in real-world settings.

Key Terms

The terms below provide a foundation for understanding the case study and help students analyze the factors affecting employee engagement at Tech Solutions, Inc.

Autonomy: The degree to which employees have control over their work, including decision making, task management, and creative problem solving.

Change Management: The structured approach organizations use to transition employees, teams, and operations through changes in structure, leadership, or culture.

Clan Culture: A workplace culture characterized by collaboration, employee involvement, and a strong sense of community and shared values.

Communication Breakdown: A failure in information sharing between employees and management, often leading to misunderstandings, mistrust, and disengagement.

Employee Engagement: The level of commitment, enthusiasm, and emotional connection that employees have toward their work and organization.

Employee Recognition: The acknowledgment and reward of employee contributions to reinforce positive behaviors and boost morale and engagement.

Employee Turnover: The rate at which employees leave an organization, whether voluntary (resignations) or involuntary (terminations).

Feedback Mechanisms: Formal and informal channels, such as performance reviews and employee surveys, that allow employees to share concerns and receive constructive input on their work.

Hierarchy Culture: An organizational structure emphasizing control, stability, and efficiency, often at the cost of flexibility and employee empowerment.

Job Characteristics Model (Hackman & Oldham, 1976): A model identifying five key job dimensions—skill variety, task identity, task significance, autonomy, and feedback—that influence employee engagement and motivation.

Job Satisfaction: The overall sense of fulfillment and contentment employees feel regarding their job roles, work environment, and career growth opportunities.

Motivation Theories: Psychological frameworks, such as self-determination theory and the job characteristics model, that explain factors influencing employee motivation and behavior.

Organizational Culture: The shared values, beliefs, and behaviors that shape the work environment and influence employees' attitudes and performance.

Psychological Safety: The belief that employees can express ideas, concerns, and mistakes without fear of negative consequences from leadership or peers.

Retention Strategies: Organizational efforts to retain top talent through incentives such as professional development, recognition programs, and career advancement opportunities.

Self-Determination Theory (Deci & Ryan, 1985): A motivation theory stating that autonomy, competence, and relatedness are essential for intrinsic motivation and job satisfaction.

Trust in Leadership: The degree to which employees believe that leadership acts with integrity, transparency, and in the best interest of employees and the organization.

Transformational Leadership: A leadership style that focuses on inspiring and motivating employees through vision, empowerment, and fostering a strong organizational culture.

Transactional Leadership: A leadership style centered on structure, rewards, and control, while performance is managed through incentives and disciplinary measures.

Workplace Transparency: Open and honest communication from leadership regarding company decisions, policies, and future directions to build trust and engagement.

Supplemental Resources

Colquitt, J. A., LePine, J. A., & Wesson, M. J. (2024). *Organizational behavior: Improving performance and commitment in the workplace*. McGraw-Hill Education.

Hackman, J. R., & Oldham, G. R. (1976). Motivation through the design of work: Test of a theory. *Organizational Behavior and Human Performance*, 16(2), 250-279.

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6

Building Accountability in the Virtual Workplace at Nova Solutions

Stephanie S. Menefee, PhD

Nova Solutions, a tech startup specializing in software development, transitioned to a fully remote work environment during the pandemic. While the transition initially seemed smooth, significant challenges emerged over time, affecting accountability, productivity, and employee satisfaction. Employees reported feeling disconnected, unsupported, and unclear about expectations, while managers struggled to effectively monitor progress and provide necessary guidance. These issues led to declining morale and inefficiency, prompting the CEO to seek guidance from a virtual leadership consultant.

One employee's letter highlighted the main concerns faced by the workforce. Employees felt uncertain about their responsibilities and how their work contributed to the company's

goals. A lack of clear expectations in meetings and delayed responses from management created frustration. Additionally, employees expressed concern that performance metrics emphasized time spent online rather than meaningful outcomes, leading to a perception that “looking busy” was more valued than actual contributions. Fragmented communication across multiple platforms caused confusion, and the absence of managers when support was needed exacerbated the sense of isolation.

The consultant identified five primary challenges contributing to these issues: (1) unclear goals and expectations; (2) ineffective performance metrics focused on hours rather than results; (3) inconsistent use of virtual communication tools; (4) managers lacking remote leadership skills; and (5) limited manager presence and availability. To address these concerns, the consultant recommended a structured approach to rebuilding accountability and engagement.

Those analyzing this case can expect to take on the role of the virtual leadership consultant, evaluating the challenges Nova Solutions faces and considering the best strategies to improve accountability and more in a remote work setting. By engaging in this analysis, participants will gain a deeper understanding of leadership challenges in remote teams, develop problem-solving skills related to virtual workplace dynamics, and refine their ability to propose actionable, real-world solutions that enhance productivity and employee well-being.

This case study highlights common challenges in remote work and emphasizes the importance of leadership, technology, and culture in fostering accountability and collaboration. Through thoughtful implementation of the consultant's recommendations, Nova Solutions can enhance employee satisfaction, rebuild trust, and improve overall productivity in a virtual setting.

Introduction

Nova Solutions, a tech startup specializing in software development, transitioned to a fully virtual workplace during the pandemic. Initially, the transition appeared smooth, but challenges soon emerged in maintaining accountability, monitoring productivity, and fostering employee satisfaction. Employees reported feelings of disconnection and lack of support, while managers struggled to track team progress effectively. These issues led to declining morale and inefficiency. To address these challenges and rebuild accountability in the remote workplace, the CEO engaged a virtual leadership consultant. The first thing the CEO did was provide the consultant with a stack of correspondence from disgruntled employees. Below is one of the many letters:

Subject: Concerns Regarding Our Remote Work Environment

Dear Management Team,

I am writing to express some concerns about our current remote work structure. While I understand the challenges of transitioning to a fully virtual workplace, there are ongoing issues that are impacting my ability to perform effectively and feel connected to the team.

First, I often feel unclear about my responsibilities and how my work contributes to the larger goals of the company. Meetings rarely address specific expectations, leaving me to guess at what is needed. When I ask for clarification, it sometimes takes days to get a response.

Additionally, I've noticed that our performance metrics seem to focus on hours spent online rather than meaningful outcomes. This approach makes me feel as though my value is measured by "busy work" rather than the actual impact of my contributions.

Communication across the team has also become increasingly fragmented. With so many platforms in use, it's hard to know where to find files or updates. This lack of consistency wastes time and adds unnecessary stress.

Finally, it feels like our managers are unavailable when we need them most. I understand that they are juggling many responsibilities, but their absence leaves me and others feeling unsupported.

I hope these concerns can be addressed, as I truly want to see Nova Solutions thrive. Improving communication, leadership accessibility, and clarity around goals would make a huge difference for our team.

Sincerely, [Disgruntled Employee #43]

Consultant Insight

After reviewing the letters and documentation provided by the CEO, the consultant identified several key challenges that were contributing to the accountability and productivity issues at Nova Solutions. These challenges, outlined below, highlight the critical areas that the consultant believed required attention to foster a more cohesive and effective virtual work environment.

- **Lack of clear goals and expectations:** Without consistent in-person meetings, employees often misunderstood their tasks, leading to delays and confusion about priorities.
- **Inadequate performance metrics:** Managers focused on monitoring logged hours rather than evaluating quality outcomes, creating an emphasis on “looking busy” instead of achieving meaningful results.

- **Inconsistent use of virtual tools:** Communication platforms like Slack, Zoom, and Asana were available but used inconsistently across teams, leading to fragmented communication and inefficient workflows.
- **Inexperienced virtual leadership:** Managers lacked training in leading remote teams, resulting in ineffective communication, unclear expectations, and insufficient team support.
- **Limited manager presence:** Managers were often unavailable during crucial times, leaving employees feeling unsupported and disengaged.

Based on the challenges identified, the consultant proposed the following solutions to address the accountability and productivity issues at Nova Solutions. According to the consultant, these strategies are designed to create a more structured, supportive, and results-driven virtual work environment while fostering stronger communication and leadership practices.

- **Set clear goals and expectations:** Define measurable, outcome-focused goals (using objective key results (OKRs)) for each team. Develop a virtual handbook outlining communication norms, protocols for meetings, and performance expectations.

- **Adopt outcome-based metrics:** Shift the focus from monitoring logged hours to evaluating completed projects and their impact. Implement biweekly check-ins for employees to discuss progress, challenges, and feedback.
- **Leverage virtual tools consistently:** Standardize Microsoft Teams for communication and file sharing. Use Asana for task management to ensure transparency and accountability across workflows.
- **Provide leadership training:** Train managers in effective virtual communication, using tools efficiently and fostering emotional intelligence. Emphasize the importance of proactive support and cultural sensitivity.
- **Maintain manager presence:** Schedule regular one-on-one meetings to address employee concerns and provide guidance. Introduce daily “virtual office hours” for employees to drop in with questions or updates.

Conclusion

The Nova Solutions case provides a compelling exploration of the complexities organizations face when transitioning to and sustaining a remote work environment. While the shift to virtual operations initially appeared seamless, deeper

issues with accountability, communication, leadership engagement, and performance evaluation soon surfaced. These challenges mirror widespread struggles across remote workplaces in which a lack of structure and support can quickly erode productivity and morale. Through the lens of this case, it becomes clear that success in virtual settings hinges on intentional leadership, consistent communication frameworks, and outcome-driven performance metrics. The consultant's recommendations offer a roadmap for reestablishing trust, clarity, and collaboration while also emphasizing the need for long-term cultural shifts. Ultimately, Nova Solutions' experience shows how fostering accountability in remote teams is a matter of not only policy and technology, but also leadership presence, empathy, and continuous adaptation to evolving workplace dynamics.



Teaching Notes

Synopsis

In this case study, Nova Solutions, a tech startup specializing in software development, transitioned to a fully remote work environment during the pandemic. While initially smooth, the shift resulted in challenges related to accountability, productivity monitoring, and employee satisfaction. Issues such as unclear expectations, fragmented communication, and the

absence of leadership support led to employee dissatisfaction and decreased efficiency. A virtual leadership expert was consulted to diagnose these problems and propose solutions aimed at fostering a structured and accountable virtual work environment. This case provides students with an opportunity to analyze real-world issues in remote work, develop leadership strategies, and propose actionable solutions for improving communication and engagement in virtual teams.

Purpose of the Case Study

The purpose of this case study is to explore the challenges of fostering accountability, communication, and productivity in a remote work environment. Using the example of Nova Solutions, the case examines how unclear expectations, inadequate leadership visibility, and ineffective performance metrics can negatively impact employee engagement and organizational effectiveness. Through the lens of a virtual leadership consultant, this study aims to help the student develop practical strategies for improving accountability and remote team management. It is designed to equip students with the skills to analyze virtual workplace challenges, apply leadership best practices, and propose actionable solutions for remote team success.

Teaching Objectives

This case study is designed to help students understand leadership challenges in remote work environments and how to

foster accountability, clear communication, and engagement in virtual teams. By the end of this case, readers should be able to:

1. **Identify** and **analyze** key challenges of managing a remote workforce, including unclear goals, performance measurement issues, and lack of leadership presence.
2. **Evaluate** and **apply** leadership strategies to improve virtual accountability, communication, and employee engagement.
3. **Develop** practical recommendations for structuring an effective remote work environment by integrating leadership skills, technology tools, and performance metrics.

Teaching Approach

This case study can be utilized in various learning settings, including business, public administration, and leadership courses. It is flexible for use in both virtual and in-person classrooms. Below are suggestions for facilitating the case:

- Classroom setting (on-ground or synchronous online)
 - Allocate one class period for discussion.

- Break students into small groups to analyze the case and answer key questions.
- Each group presents their responses to the class, followed by a larger discussion.
- Asynchronous online setting
 - Allow one week for case analysis and responses.
 - Require students to submit a written response addressing key questions.
 - Option: Students can create an infographic summarizing their recommendations and post it to a discussion board for peer interaction.

Assignment Components

Students will complete three tasks to reinforce their learning:

1. Analyze the case study and employee's letter: Identify key challenges at Nova Solutions and assess the effectiveness of the solutions implemented.
2. Draft a response to the employee's letter: Write a management response addressing the concerns raised, proposing concrete actions for improvement.
3. Develop a virtual accountability plan: Design a brief action plan for an organization transitioning

to remote work, incorporating leadership strategies, technology integration, and performance metrics.

Discussion Questions

Students could analyze the case study using the following questions:

1. How do the challenges faced by Nova Solutions reflect broader issues in remote work environments?
2. How do Nova's accountability issues connect to common struggles in remote work, such as poor communication, lack of structure, and unclear performance expectations?
3. How might unclear goals and lack of manager presence contribute to employee dissatisfaction?
4. Discuss how limited leadership engagement, delayed responses, and ambiguous responsibilities impact employee morale and productivity.
5. Which of the solutions implemented at Nova Solutions would you prioritize, and why? Encourage students to critically evaluate the proposed solutions, selecting those they believe would have the most immediate impact and explaining their reasoning.

6. Imagine you are a virtual leadership consultant. How would you address the concerns raised in the employee's letter?
7. Draft a response outlining specific actions to improve communication, leadership support, and work clarity.
8. What additional steps could Nova Solutions take to foster collaboration and accountability in the long term?
9. Encourage students to propose long-term strategies, such as ongoing leadership training, refined performance metrics, and structured communication frameworks.

Suggested Solutions

1. The challenges faced by Nova Solutions reflect broader issues common to many remote work environments. As companies shifted to virtual models during the pandemic, many struggled to maintain the same levels of clarity, communication, and connection that physical offices naturally support. At Nova, employees experienced disconnection, unclear expectations, and inconsistent leadership support, all of which are well-documented hurdles in remote settings. These problems highlight the wide-

spread need for structured communication, accessible leadership, and clear goal setting in distributed teams. Nova's situation underscores how failing to adapt traditional management practices to the remote environment can quickly erode accountability and morale.

2. Nova's accountability issues directly mirror widespread struggles seen in remote work. A major concern was the absence of clear communication, which left employees unsure of their responsibilities and disconnected from the company's broader goals. This lack of structure was further compounded by inconsistent meeting practices and delayed managerial responses. Furthermore, performance evaluations based on time spent online rather than meaningful results made employees feel that productivity was being misjudged. These conditions fostered a workplace culture in which appearing busy seemed more important than producing valuable work, weakening the very essence of accountability.
3. The lack of managerial presence and vague goal setting at Nova Solutions contributed significantly to employee dissatisfaction. When managers are absent or unresponsive, employees feel abandoned, particularly in a remote context in which opportunities for spontaneous check-ins or informal conversations

are minimal. Without clear goals, workers are left to guess what success looks like, which can be demotivating and stressful. This ambiguity fosters uncertainty and disengagement, eroding trust in leadership and diminishing the sense of purpose that connects individuals to their work and organization.

4. Limited leadership engagement, slow response times, and vague roles had a detrimental impact on both morale and productivity at Nova Solutions. Employees reported feeling isolated and unsupported, which undermined their motivation and job satisfaction. Delayed responses from management not only hindered decision-making but also signaled a lack of urgency or care, further demoralizing staff. Moreover, when responsibilities were poorly defined, it became difficult for team members to coordinate effectively or hold one another accountable. These conditions led to confusion, inefficiencies, and a growing distrust between staff and leadership.
5. Among the solutions implemented at Nova Solutions, prioritizing the adoption of outcome-based performance metrics would likely yield the most immediate impact. Shifting the focus from hours worked to results achieved addresses a core complaint from employees that their contributions were being undervalued in favor of “looking busy.” This

change reinforces a culture of accountability based on tangible impact rather than superficial presence. Additionally, it can quickly realign employee motivation with organizational goals and provide a clearer picture of performance, which is important for effective remote management.

6. A virtual leadership consultant could approach the concerns raised in the employee's letter with a commitment to restoring clarity, connection, and support. They could first validate the employee's experience and acknowledge the legitimate frustrations they described. Then, they could emphasize the need for clear communication protocols, streamlined digital tools, and consistent leadership engagement. Introducing defined goals tied to organizational outcomes, creating dedicated time for managerial availability, and standardizing communication platforms to reduce confusion could also help. These steps would collectively rebuild trust, ensure alignment, and empower employees to thrive in a virtual environment.
7. In response to the employee's letter, it could be helpful to propose several specific actions to improve the work environment. First, establish clear, outcome-based goals for each employee, aligned with team and company objectives. Second, introduce a

biweekly one-on-one check-in system so employees can discuss progress and obstacles and receive timely feedback. Third, streamline communication platforms, standardizing Microsoft Teams and Asana for all collaboration and file-sharing needs. Fourth, managers will participate in leadership training focused on remote communication, emotional intelligence, and proactive support. Lastly, implement daily virtual office hours, ensuring managers are consistently available to support their teams.

8. To foster long-term collaboration and accountability, Nova Solutions should invest in several additional initiatives. Ongoing leadership development is essential to equip managers with the skills needed to lead virtual teams effectively. Refining performance metrics to better capture qualitative outcomes will ensure employees feel fairly evaluated and appreciated. Nova should also implement a structured communication framework that defines expectations around response times, meeting norms, and platform usage. Regularly scheduled team-building activities and feedback loops will reinforce a culture of trust, transparency, and continuous improvement, helping to sustain engagement and cohesion over time.

9. In the long term, Nova Solutions can build a resilient and high-performing virtual workplace by implementing strategies such as continuous leadership training focused on remote-specific competencies and emotional intelligence. They could also refine their performance evaluation systems to emphasize outcome-based metrics that reflect true contributions rather than time spent online. Structured communication frameworks, including defined protocols for meetings, updates, and collaboration tools, can prevent fragmentation and misalignment. Additionally, creating a culture that values proactive feedback, team recognition, and psychological safety will be critical in maintaining high morale and accountability across the organization.

Activity

This activity invites you to step into the role of a virtual leadership consultant as you analyze the challenges and solutions at Nova Solutions. Using the provided questions, reflect on how the case study illustrates broader issues in remote work environments; evaluate the effectiveness of the proposed solutions; and consider how you might address specific employee concerns. This exercise encourages you to prioritize actionable strategies, develop creative solutions, and propose long-term improvements to enhance collaboration, accountability, and overall team satisfaction in a virtual workplace.

Consider these questions before you begin the activity:

- How do the challenges faced by Nova Solutions reflect broader issues in remote work environments?
- How might unclear goals and the lack of manager presence contribute to employee dissatisfaction, as highlighted in the employee's letter?
- Which of the solutions implemented at Nova Solutions would you prioritize and why?
- Imagine you are a virtual leadership consultant. How would you address the concerns raised in the employee's letter?
- What additional steps could Nova Solutions take to foster collaboration and accountability in the long term?

Now that you've considered the challenges and solutions at Nova Solutions, here's an opportunity to hone your skills with a hands-on activity. This assignment will help you analyze real-world issues, craft thoughtful responses to employee concerns, and develop practical strategies for improving accountability and engagement in virtual organizations. Dive into the case study, respond to the employee's letter, and design a virtual accountability plan to put your ideas into action.

- Analyze the case study and employee's letter: Identify key challenges faced by Nova Solutions and evaluate the effectiveness of the solutions implemented. Reflect on how these solutions could be adapted for similar virtual organizations.
- Draft a letter in response to the employee's letter: Write a response from management addressing the concerns raised and outlining specific actions to improve clarity, support, and communication.
- Develop your virtual accountability plan: Create a brief action plan for an organization transitioning to remote work, incorporating principles of accountability, leadership development, and employee engagement.

As you work through these questions, keep in mind a few key focus areas to guide your analysis. Look for the main accountability challenges and consider how the solutions implemented at Nova Solutions could apply to similar virtual settings. Reflect on the leadership skills and strategies that are critical for fostering collaboration and clarity in remote teams. Finally, think about how your proposed action plan can balance accountability, employee engagement, and leadership development to create a sustainable framework for

virtual work. These points can help shape your responses and action plan:

- **Analyze challenges in virtual organizations:** Identify common accountability issues that arise in remote work environments and evaluate their impact on team performance and morale.
- **Evaluate the effectiveness of solutions:** Assess the strategies implemented by Nova Solutions and determine which actions had the most significant impact on productivity and satisfaction.
- **Understand leadership competencies for virtual teams:** Explore how leadership skills such as clear communication, emotional intelligence, and technological proficiency are critical in managing remote teams.
- **Draft recommendations for long-term success:** Propose additional solutions that could strengthen Nova Solutions' accountability plan and ensure sustainable improvements.

Key Terms

The list below covers the essential concepts needed to understand and analyze the challenges and solutions presented in this case study.

Accountability: The responsibility of employees to complete assigned tasks, meet expectations, and take ownership of their work outcomes.

Collaboration Tools: Software such as Slack, Zoom, and Google Drive that facilitate teamwork and interaction in a remote work environment.

Communication Breakdown: A failure in exchanging information effectively, often leading to misunderstandings, inefficiency, and decreased productivity.

Emotional Intelligence (EI): The ability of leaders to recognize and manage their own emotions while understanding and influencing the emotions of others.

Employee Autonomy: The degree of independence employees have in making decisions and managing their tasks without micromanagement.

Employee Engagement: The level of enthusiasm, commitment, and involvement an employee has in their job and the organization.

Employee Morale: The overall job satisfaction, confidence, and attitude of employees toward their workplace and responsibilities.

Feedback Mechanism: Processes and tools used to provide employees with performance-related input, ensuring continuous improvement and alignment with organizational goals.

Leadership Visibility: The extent to which leaders are present, accessible, and engaged with employees in the workplace, influencing morale and motivation.

Micromanagement: A management style in which leaders excessively control or oversee employees' tasks, often leading to disengagement and reduced motivation.

Organizational Culture: The shared values, beliefs, and practices that influence how employees interact and work within a company.

Outcome-Based Performance Evaluation: A measurement approach that assesses employees based on completed work and results rather than time spent working.

Performance Metrics: Standards used to measure an employee's effectiveness and productivity, which can include qualitative or quantitative assessments.

Proactive Support: A leadership approach with which managers anticipate employee needs and provide guidance before issues escalate.

Remote Work: A work arrangement in which employees perform their job duties outside of a traditional office setting, often using digital tools to stay connected.

Task Management Tools: Digital platforms such as Asana, Trello, or Microsoft Teams used to organize, assign, and track project progress in remote settings.

Trust Deficit: A situation in which employees lack confidence in management's ability to support and lead them effectively, often due to poor communication or lack of responsiveness.

Virtual Leadership: The ability of managers to lead, communicate, and support their teams effectively in a digital or remote work environment.

Virtual Office Hours: Scheduled times when managers or team leaders are available online to address employee concerns, answer questions, and provide guidance.

Workplace Transparency: The practice of openly sharing information, decisions, and expectations to build trust and alignment within an organization.

Overcoming Accountability Challenges in a Virtual Work Environment

Lisa M. Harris, DBA and
Christine Gehrke, DBA

Montezooma, Inc. (Montezooma), a California-based corporate customer service consulting company, operated as a brick-and-mortar business for over two decades until the COVID-19 pandemic forced a rapid transition to a fully virtual work environment. This transition brought significant challenges for leadership, particularly around accountability, which strained team dynamics and threatened the company's culture, reputation, and financial stability. The main characters of the study included Montezooma's vice president of customer service, Fredrick Thournberg, and the customer service director, Teanna Mouree. Montezooma began to face significant leadership and accountability challenges due to Fredrick's inability to manage Teanna through the transition to a virtual work environment, partly

due to her micromanagement and ill-treatment of her team. Despite Montezooma's commitment to its mission and vision (a culture of accountability), the culture and financial stability suffered due to a lack of leadership accountability from Fredrick. But can the lack of accountability be reversed through training to restore company culture and financial stability?

Introduction

This case examines the leadership challenges at Montezooma, a corporate customer service consulting firm that creates customized training solutions, helps organizations build high-performance cultures, and aligns employee behavior with strategic goals. The California-based company has just under 200 employees. It operated as a brick-and-mortar business for over 20 years, with all consulting services previously delivered in person to clients.

During the COVID-19 pandemic, the company was forced to quickly adopt a virtual work model, providing all consulting services using electronic tools such as Zoom or Microsoft Teams. This shift introduced new challenges for leadership, particularly in managing team dynamics and ensuring accountability across both in-person and virtual settings. The case focuses on the accountability challenges of the senior vice president of customer service, Fredrick Thournberg, and the customer service director, Teanna Mouree.

The case chronicles the significant leadership and accountability challenges Fredrick faced in managing Teanna and her team's productivity. Fredrick failed to address Teanna's ongoing management and performance issues, including micromanagement and consistently taking credit for her team's work. This management style created an unhealthy relationship with her team members, a problem that existed even before the transition to virtual work but was exacerbated by it. The transition also affected clients and, consequently, the company's financial stability. Fredrick's reluctance to counsel and correct Teanna led to declining team morale and productivity, underscoring the necessity of mediation, targeted training, and leadership coaching.

To help clients build high-performance cultures and align employee behavior with strategic goals, Montezooma's philosophy was to foster excellence in customer service, transformational leadership baked in responsibility, and a healthy and thriving culture focused on the importance of accountability. Accountability plays a crucial role in workplace dynamics, directly influencing employee engagement, productivity, and organizational success (Pollack, 2024a).

Since its founding over 20 years ago, Montezooma had fostered a culture of accountability, recognizing that accountability is essential for both building a healthy workplace environment and empowering employees to reach their highest potential. Montezooma considered accountability the oblig-

ation to accept responsibility and justify one's actions, emphasizing its own role in maintaining ethical and effective leadership. Leadership believed they had discovered a way to cultivate an accountable culture in which all employees took ownership of their actions to promote well-being and organizational health, and they shared this model with clients. They also emphasized that for teams to be effective, both leaders and individual members must take ownership of their actions and remain accountable to their colleagues (Kankaraš, 2024). However, Fredrick's failure to hold himself accountable for his own management decisions regarding one of his employees had a significant impact on the company's culture and financial well-being.

The Role of Accountability at Montezooma

Montezooma's mission and vision were critical to its operational success and the change to a virtual work environment. The mission involved driving excellence through accountability, innovation, and teamwork to cultivate a healthy culture and foster strong customer relationships. At the same time, the company was dedicated to setting the standard for accountability, customer focus, and innovation while cultivating a thriving work culture. This mission and vision remained in place through the shift to a virtual work environment. Despite the company's commitment to its mission and vision, the once-healthy culture suffered due to a lack of accountability by both Teanna and Fredrick. The transition to

a virtual work environment damaged customer relationship, pushing the company to the brink of financial instability as customers began to withdraw their business. Fredrick's responsibility to address Teanna's performance issues was critical to restore accountability, improve team dynamics, and stabilize the company's financial position.

But, who were Teanna and Fredrick, and what happened within their leadership and accountability efforts that almost cost the company its reputation, financial stability, and a healthy culture? What leadership training measures could Montezooma implement to transform the culture, overcome these virtual-era challenges, and turn the organization around both professionally and financially?

Teanna Mouree: The Problematic "Closer"

Teanna, the customer service director at Montezooma, Inc., had been in her leadership role for over seven years. She earned the nickname "the closer" because she was skilled at securing deals and maintaining strong client relationships. Teanna also had a reputation for micromanagement, manipulation, and constant hovering over her team, undermining their efforts. Rather than empowering her team, she belittled and berated them, creating a culture of fear and frustration and, thus, a toxic work environment. She frequently took credit for their hard work and participated in idle gossip, but all the while she ensured that upper management viewed her as the driving

force behind her department's success. At the same time, her team remained unrecognized and became disheartened, but this was overlooked by leadership due to the team's consistently high sales before the COVID-19 pandemic.

Despite overseeing customer service, Teanna often missed internal administrative deadlines and failed to meet key performance goals. Instead of taking accountability for her actions, she shifted the blame onto her employees. Her ability to close deals was mainly due to her team's tireless efforts, rather than solely her contributions. Teanna's team handled much of the groundwork, problem-solving, and execution that led to each successful client interaction. However, in moments of success, Teanna always stepped to the forefront, claiming sole credit for it. Her manipulative tactics created tension and ensured that dissenting voices were silenced. She fostered an atmosphere in which the team feared retaliation if they spoke out against her behavior. This created a revolving door of disengaged team members, some leaving due to burnout, while others remained stuck in a toxic environment in which their contributions were unappreciated.

Despite her understanding of the company's mission and values, her actions increasingly undermined team cohesion and the organization's reputation. Teanna struggled to adapt to the virtual work model. She preferred that her team work in the office or at the client's office where she would be present to observe them instead of managing them through virtual

communication channels. When the customer service department transitioned to a 100% virtual work environment, she did not adapt, routinely missing virtual meetings and failing to respond to critical communications and deadlines from her team. Teanna's leadership failures, which had previously threatened team morale, became even more pronounced in the virtual work environment. This increased tension, and customers noticed the impact on team morale, including Montezooma's long-term clients. This in turn affected customer relationships and overall financial success.

Fredrick Thournberg: The Reluctant Leader

Fredrick, the vice president of customer service at Montezooma, Inc., was known for his ability to drive excellence in customer service. He had been a mainstay at Montezooma for over fifteen years. His strategic mindset and focus on efficiency helped streamline company processes and improve performance. However, when managing people, particularly holding leaders accountable, Fredrick fell short.

One of his most significant failures was his inability to address the ineffective and toxic leadership of Teanna. Despite repeated employee complaints about her mistreatment, micromanagement, and manipulative behavior, Fredrick chose to

look the other way. He disliked conflict and avoided difficult conversations, allowing Teanna to continue creating a hostile work environment without consequence as long as her team produced the expected level of sales and productivity.

Freedrick's reluctance to intervene had serious repercussions for the company's operations. As Teanna continued to belittle and exploit her team, morale plummeted, and productivity suffered. Employees felt unsupported and disengaged, resulting in missed deadlines and decreased service quality. This was initially difficult to observe, as client services were being delivered virtually without direct visual oversight. The ripple effect extended beyond internal operations as longtime clients noticed deterioration in service quality. Dissatisfied with the declining standards, several opted not to renew their contracts, putting the company's reputation and revenue at risk.

By failing to uphold Montezooma's culture of accountability, Freedrick enabled a toxic workplace and jeopardized the company's long-term success. His inaction underscored the critical role that leadership accountability plays in maintaining a healthy virtual work environment. Without it, even the strongest operational strategies could not prevent the fallout of poor leadership and disengaged employees. These behaviors, left unaddressed by Freedrick, further disrupted workflow and lowered overall team morale. His reluctance to confront the issue allowed Teanna's actions to persist unchecked,

eroding trust and productivity. Not only were long-term clients opting not to renew their contracts, but even more customer service employees were opting to leave the company and work for competitors.

The revolving door of disengaged team members increased significantly in this virtual work environment. Not having employees in the office reduced the opportunities for Fredrick and Teanna to talk, not only with each other but also with the customer service team employees. Face-to-face discussions could have revealed sooner when an employee was considering leaving, allowing Fredrick and Teanna to speak with the employee and try to convince them not to leave the company. The employee turnover rate exceeded the rate under Teanna pre-COVID-19.

Montezooma's Leadership Reaction

Eventually, the accountability challenges and complaints from Teanna's team reached the desk of the Chief Human Resource Officer (CHRO) and the Chief Executive Officer (CEO) of Montezooma, sparking action. Noticing the increase in turnover, the HR team started conducting virtual exit interviews with Teanna's team members who had left. In these interviews, often-cited reasons for leaving were decreased morale, declined engagement, productivity, and a lack of healthy culture in the customer service department. Additionally, more clients decided not to renew services;

complaints increased; long-term clients threatened the CEO to terminate their contracts; and employee morale, engagement, and productivity declined. The company also faced an unhealthy cultural shift. Montezooma's leadership recognized that immediate changes were needed, as the company's financial stability was in jeopardy. The CEO and CHRO called a meeting with Fredrick to discuss the situation with his team, specifically within the customer service department, and eventually brought Teanna into the discussion. The CHRO and CEO initiated a formal investigation into Teanna's department.

This was initially a shock to the CEO since Teanna had been with Montezooma for seven years, and Fredrick for 15 years, with no formal complaints or known incidents. For two years before COVID-19, they had worked as a team to help the company grow its revenues threefold. Given this, leadership's first reaction to the new emerging challenges was not to fire Fredrick and Teanna, but to find a resolution—if they were both willing to change their behavior and leadership efforts. The CEO assigned this task to the CHRO to help turn the customer service department around without firing Fredrick or Teanna.

The CHRO and HR team met with Fredrick and Teanna to discuss accountability measures and develop a plan to rectify the situation. The first meeting began with an HR plan for conflict resolution and mediation between Teanna

and Fredrick. It was decided that a comprehensive training and coaching plan should be developed to provide Teanna's team with counseling. This was important due to decreased morale and trust and cultural challenges. To rebuild culture and productivity, the goal was to strengthen team dynamics, enhance accountability, and restore organizational trust with both employees and customers, with the hope that this would once again lead to a healthier company culture. But how did they go about doing this? With Teanna and Fredrick's willingness to change, the HR department implemented an accountability intervention, including targeted training, leadership coaching, and a conflict resolution plan tailored to their individual assessment needs, as outlined below.

Targeted Training, Coaching, and Conflict Resolution

Under the direction of the CEO, the CHRO implemented conflict resolution strategies for Teanna and Fredrick. The training sessions covered several critical areas:

- **Leadership Accountability**—Fredrick and Teanna learned about setting clear expectations, providing regular feedback, and taking responsibility for individual and team performance (Pollack, 2024b).
- **Conflict Resolution**—They received training on effective conflict resolution strategies to address interpersonal issues within the team and enhance communication (Skillssoft, n.d.).

- **Goal Setting and Performance Management**—The program emphasized setting measurable goals, tracking progress, and maintaining consistency in team accountability (HRDQ, 2020).

Conclusion

The case of Montezooma highlights the critical need for leadership accountability, particularly in a virtual work environment. Fredrick's initial reluctance to address Teanna's behavioral and performance issues resulted in declining team morale and customer dissatisfaction, weakening the company's reputation. However, through coaching and targeted training sessions, Fredrick and Teanna can gain the skills needed to transform their leadership approaches, fostering a more productive and cohesive team.

Montezooma's serves as a compelling example for organizations navigating similar challenges. It reinforces the necessity of establishing clear expectations, fostering accountability at all levels, and equipping leaders with tools to effectively manage in-person and remote employees. Ultimately, the case study demonstrates that leadership accountability as a corrective measure is a foundational element of sustainable organizational success.



Teaching Notes

Synopsis

Montezooma, Inc., a California-based corporate customer service consulting company, faced a critical leadership crisis after transitioning from a traditional brick-and-mortar operation to an entirely virtual work environment during the COVID-19 pandemic. This abrupt shift exposed significant accountability challenges, particularly within the customer service division led by vice president Fredrick Thournberg and director Teanna Mouree.

Fredrick struggled to manage Teanna's problematic leadership style, marked by micromanagement and credit-taking, which led to declining team morale and productivity. His reluctance to address these issues undermined Montezooma's long-standing culture of accountability, damaging both employee engagement and client relationships. As a result, the company's reputation and financial stability were severely threatened, highlighting the urgent need for intervention.

Despite the significant challenges, there is hope for Montezooma. The company can restore its culture and financial stability by implementing targeted leadership training and renewing accountability measures. This case study offers insights into the crucial role of accountability in maintaining high-performance teams in a virtual work environment.

Purpose of the Case Study

The purpose of this case is to demonstrate the detrimental impact of failing to uphold leadership accountability during the transition to a virtual work environment and how structured interventions can mitigate the negative consequences. Freedrick's inaction weakened his team's efficiency and set a precedent for tolerating underperformance. Addressing these leadership shortcomings required structured interventions, including accountability training and conflict resolution strategies, to restore workplace cohesion and operational effectiveness. Applying this in the new virtual work environment creates another layer of complexity in implementation.

Learning Outcomes

By the end of this case study, readers will have gained practical strategies to enhance leadership effectiveness, proactively address workplace conflicts, and implement training solutions that strengthen accountability, foster healthy team morale, and boost productivity in virtual work settings. At the end of this case, readers should be able to:

1. **Define** the consequences of a leader's failure to address toxic behaviors and enforce accountability, including impacts on team morale, productivity, finances, and organizational culture.

2. **Summarize** the key challenges of resolving conflicts and mediating disputes in virtual work environments and their impact on team performance and client relationships.

3. **Illustrate** how leadership accountability and proactive conflict resolution strategies can improve team cohesion and workplace outcomes in virtual settings.

Leadership and Accountability in Changing Workplaces

This case study can be applied in academic and organizational settings to examine the challenges faced by a company that lacks accountability for a manager but then transitions to a remote, virtual, or hybrid work environment. The case can also be used to facilitate discussions in academic settings, linking theoretical concepts with real-world applications in leadership and accountability. In a business setting, human resources professionals and trainers can utilize the case to develop actionable employee plans within organizational settings, enhancing leadership effectiveness and accountability practices during changes in the workplace environment.

The Teaching Objectives of the Case:

1. Analyze the challenges a company faces when transitioning to a virtual work environment, including the impacts on productivity, morale, and organizational culture.

2. Assess the effectiveness of accountability measures implemented by leadership in organizational change.
3. Examine change management frameworks and their role in guiding the transition to virtual work environments.
4. Foster critical thinking by identifying potential gaps in leadership strategies and proposing alternative approaches to improve accountability and team dynamics.
5. Encourage problem-solving skills by designing practical solutions to address organizational challenges outlined in the case study.

These objectives aim to create a comprehensive learning experience that bridges theory and practice while emphasizing critical thinking and problem-solving.

Teaching Approach

To initiate engagement, instructors and trainers can pose thought-provoking, opening questions tailored to the audience level:

- **Undergraduate**—Focus on foundational leadership concepts and simple applications of the Virtual Leadership Framework. Use guided activities to

introduce critical thinking and team-based problem solving. What challenges might leaders encounter when transitioning to a virtual or remote work environment? How could these impact team dynamics?

- **Graduate**—Incorporate theoretical depth, such as frameworks for change management and leadership styles, alongside practical applications. How can the Virtual Leadership Framework help leaders maintain accountability while navigating organizational changes?
- **Professional Development**—Prioritize actionable insights and real-world applications. Emphasize problem solving for specific challenges participants may face in their organizations.

Encourage participants to share their initial reactions and insights to establish a connection between their personal experiences and the case study content.

Group Activities

- **Role-Play Scenarios**—Divide participants into groups and assign roles (e.g., CEO, CHRO, HR manager, team leader, employee). Using the case study, each group will develop and present a plan to

resolve a specific challenge faced during the transition (e.g., holding managers accountable or addressing employee burnout).

- **Virtual or Hybrid Leadership Simulation**—Challenge groups to design leadership strategies while adapting to shifting variables, such as sudden remote work directives or team conflicts. Incorporate elements of the Virtual Leadership Framework, such as communication and trust-building techniques.

Individual Activities

- **Debrief Discussions**—Facilitate reflective discussions after the case activity. Ask participants to share what they have learned and evaluate the effectiveness of their proposed solutions. Encourage connection to the Virtual Leadership Framework and its role in accountability and successful change management.
- **Action Plans**—Participants can create actionable leadership plans tailored to their contexts, applying insights from the case study and relevant theoretical frameworks. This ensures retention and relevance of learning beyond the session.

- **Case Study Analysis Report**—Assign a brief report analyzing the case study and proposing strategies based on the Virtual Leadership Framework. This task helps consolidate theoretical understanding and practical application.

These activities encourage critical thinking and problem solving, emphasizing the application of theoretical concepts and leadership strategies in real-world scenarios.

Discussion Questions

1. Considering the identified critical areas, what are the key components of a comprehensive targeted training, coaching, and conflict resolution plan for Fredrick and Teanna?
2. What could be the potential outcomes of this comprehensive targeted plan?
3. What special considerations should this plan include in a virtual work environment?

Case discussion questions can be added to the above primary questions based on the purpose of using the case. Discussions can be used to achieve the learning objective, tailored to various learning objectives, and adapted to multiple contexts (online or in person).

1. How can leaders strike a balance between accountability and empathy when managing resistance to change within a virtual work environment?
2. How might inconsistent accountability enforcement among managers affect employee morale and organizational culture during the transition to virtual work?
3. What strategies can be implemented to ensure accountability in virtual work models without micro-managing or compromising employee autonomy?
4. How does the shift to virtual work reshape traditional metrics for evaluating leadership performance and accountability?
5. What are the potential long-term consequences of neglecting leadership accountability during organizational change periods, and how can these be mitigated?

These discussion questions encourage critical thinking, debate, and reflection on both theoretical concepts and practical applications, providing opportunities to explore diverse perspectives.

Suggested Solutions

1. Considering the identified critical areas, what are the key components of a comprehensive, targeted training, coaching, and conflict resolution plan for Teanna and Freedrick?

Teanna's Behavior and Leadership Training Plan

- **Behavioral Coaching**—One-on-one coaching sessions will help address her toxic leadership behaviors, micromanagement, manipulation, and belittling. These sessions will emphasize the negative impact of these behaviors on team morale, trust, and productivity and the need for training in empathetic leadership in order to deeply understand her team emotionally and intelligently and rebuild their trust (Lofgren, 2025).
- **Leadership Development**—Enrolling in a leadership program focused on emotional intelligence, conflict resolution, and effective team management will help her recognize the importance of constructive feedback, delegating tasks, and empowering her team instead of controlling them (Hacking HR Team, 2024).
- **Accountability and Performance Management**—Enrolling in an online accountability train-

ing course will help Teanna hold her teams accountable peacefully and effectively without resorting to manipulation or intimidation (Pollack, 2024a).

- **Customer Service Excellence Training**—This training program should help her improve communication skills and customer interactions. It should also encourage her to acknowledge her team’s achievements instead of taking credit for their work, enhancing team motivation and cohesion (Bullwinkle, 2024). She will learn how to enhance client relationships by fostering trust within her team, leading to more authentic and effective customer engagement (Skillsoft, n.d.).

Fredrick’s Accountability and Leadership Training Plan

- **Conflict Resolution and Difficult Conversations:** Workshops held by Fredrick to address personnel issues will help Teanna learn techniques for assertive communication, active listening, and providing constructive feedback to employees exhibiting disruptive behaviors (Gould Training, n.d.).
- **Leadership Confidence and Decision Making:** Executive coaching sessions and practicing scenario-based decision making will enhance

Fredrick's ability to enforce company policies (Hubble, 2025).

- **Performance Management Strategies:** Structured employee evaluations with regular feedback loops will prevent future managerial lapses. This training covers performance review best practices, goal setting, and monitoring employee progress (Litzenberger, 2024).
- **Cultural and Team Dynamics Training:** Through cultural competency training, Fredrick will develop strategies for cultivating a virtual-friendly culture that balances flexibility with accountability, enhancing team morale and productivity to adapt effectively to evolving work dynamics (Liddell, 2024).
- **Mentorship and Development:** Mentorship will help employees gain valuable insights into handling complex leadership challenges, reinforce a culture of accountability, and improve employee engagement, fostering a stronger bond based on trust and mutual respect (Andrews, 2024). Like Teanna, Fredrick will enroll in an online leaders' accountability training course to learn how to peacefully and effectively hold himself and his team accountable (Pollack, 2024a).

2. What are the potential outcomes of this comprehensive, targeted plan?

Fredrick and Teanna completed the assigned training sessions and quickly began applying their new skills. Morale began to be restored as employees witnessed positive changes in leadership and management. Fredrick used the following structured training sessions to get the department back on track and rebuild morale (Expert Panel, 2025):

- Communicating clear expectations by defining necessary tasks, nonnegotiable requirements, and deadlines.
- Implementing accountability frameworks to foster a culture of ownership, responsibility, and commitment.
- Encouraging self-motivation by training Teanna to uphold her commitments to herself and the team.
- Setting measurable objectives and deadlines to ensure progress and completion.
- Fostering peer accountability by pairing team members to track progress and provide feedback.

As Teanna's performance improved, the team benefited. Teanna improved in managing her team, fostering collaboration, consciously reducing office gossip, and engaging in

positive, professional conversations with her team, colleagues, and customers. She became more accountable for her actions, took ownership of her performance, attended virtual meetings regularly, met deadlines, and communicated effectively with her team to work toward a more professional and respectful work environment (Pollack, 2024a). With Teanna focused on delivering high-quality service and maintaining clear communication, customer complaints decreased, and positive feedback increased. The company's reputation for excellent customer service was restored, and the department's overall performance improved (Pollack, 2024a).

Freedrick, who previously struggled with conflict and accountability, became more confident in his leadership role. For Freedrick, the coaching and training sessions in leadership development, customer service, and conflict management improved and refined his leadership style, equipping him to promptly provide constructive feedback, address performance issues, and promote accountability within his team (Pollack, 2024b). With a firmer grasp of leadership accountability, Freedrick set more precise expectations and guided Teanna and his employees toward improved performance.

3. What special considerations should this plan include to effectively address the unique challenges and opportunities in return-to-work and hybrid work environments, considering various companies and industries?

The primary consideration is that all planned activities and training will be conducted virtually. Any training selected should require participants to pass a quiz or submit a written report to ensure they were actively engaged in the training and demonstrated comprehension of key concepts. Considering the seriousness of the situation, these check-ins should be monthly for the first six months to ensure sufficient progress tracking.

Customer service department employees should be surveyed periodically for the first six months to ensure progress is made on the department culture. Since this is a virtual environment, the CEO and HR cannot visually see that the environment is improved; therefore, they must have responsive data from employees of an improved environment.

Key Terms

Change Management: The systematic approach of dealing with the transition or transformation of an organization's goals, processes, or technologies (Hanna et al., 2024).

Conflict Resolution: The process that two or more parties use to find a cordial solution or resolve a problem, creating a positive work environment based on communication and trust (Intuit Mailchimp, n.d.).

Employee Performance: Describes how well employees complete their duties and contribute to the organization's success, including efficiency, productivity, and quality of work (Litmos, 2025).

“Healthy” Workplace Culture: A culture in which employees feel safe, valued, and have growth opportunities. It is characterized by open communication, mutual respect, and a sense of community (Spartaco, 2024).

Leadership Accountability: When employees in a management or leadership role hold themselves accountable for their actions and decisions, they are responsible for their team's successes and failures (Indeed, 2024).

Targeted Training: Refers to a planned set of activities to enhance employee skills and leadership behaviors required to achieve broader business goals (Sharma, 2022).

Supplemental Resources

Center for Hybrid and Virtual Organizations
www.chvo.nu.edu

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Navigating the Continuation of a Hybrid Work Environment in a Hospital Setting

Eugene Wilkerson, PhD, SPHR and
Rochelle L. Cason-Wilkerson, MD

The University of New Haven is located in a western state, in a city with a population of two million. New Haven is a “research one” institution with a medical school and various nationally ranked departments. The New Haven Hospital is attached to the university and is a magnet for physicians who seek a research career or an inpatient hospital setting.

A few months before the COVID-19 pandemic, New Haven Hospital developed a strategic plan to transform 10% of its healthcare services into telehealth over the next five years. Once implemented, the hospital planned to study the impact of telehealth on patient care and evaluate whether expansion

was an option. The COVID-19 crisis forced the hospital to accelerate its plans and create a 100% telehealth environment within eight weeks.

Now, four years after the pandemic, the hospital faces various organizational challenges. Telehealth is popular among patients because of its convenience, yet many doctors remain uncomfortable with the technology. Many providers (physicians and nurse practitioners) have expressed concerns about the quality level of patient care. This has caused the hospital to propose a strategic plan to reduce the telehealth patient population to no more than 10% within the next 12 months.

An emphasis on face-to-face patient care is believed to improve patient care. The shift away from telehealth has increased the attrition rate among staff—registered nurses, medical assistants, certified nurse assistants, schedulers, front desk staff, and IT support—who benefited from telehealth, as it expanded opportunities to work from home. They are leaving for opportunities at other hospital systems that have embraced telehealth.

Introduction

Dr. Charles Smith, President of New Haven Hospital, is contacting Jones and Jones Consulting to assist with several human resources and organizational development issues. (Please see the letter below for case details.) Integrating telehealth into the outpatient environment is central to several human

resources and organizational development issues he seeks to solve. Dr. Smith is attempting to balance the expectations of a complex patient population that desires to receive the highest quality care in the most convenient manner possible. Telehealth is a popular option among much of the patient population. In addition, he is managing the expectations of several internal stakeholders who have differing views on the value of telehealth.

Dr. Smith reports to the University of New Haven's president, who advocates for new technology and innovation. The providers at the hospital have raised several concerns about their ability to provide quality patient care using telehealth. For hospital staff, telehealth is popular, as it allows for more opportunities to work from home, creating a better work-life balance.

Your task is to (1) identify the human resources and organizational problems that existed before COVID-19; (2) understand the issues surrounding the integration of a virtual environment into a traditional face-to-face environment; and (3) propose human capital, communication, and process-related solutions that address the issues you see at a leadership, customer, and employee level.

Email from President to Consultant—Confidential Internal Documents Included

Dear Jones and Jones,

My name is Dr. Charles Smith, and I have been the President of New Haven Hospital for the last 10 years. My background includes thirty years of experience in various roles within my sub-specialty of anesthesiology, including department chair and dean of the School of Medicine. I served as Provost/Executive Vice President for Academic Affairs for seven years before being appointed hospital president. This is how I met Dr. Theo Young, Dean of the School of Medicine at Queens Hospital in Vancouver, Canada, who referred me to you. He has spoken highly of your work with his hospital, which addressed their human resources and organizational development challenges. Our hospital will benefit from your expertise.

New Haven Hospital is an academic hospital focused on improving the health of our community. It is located in Havenport, an urban center of 2.5 million people surrounded by an expansive rural community of 1.5 million. The hospital has 1024 faculty and providers, two-thirds in clinical roles and one-third in academic medicine and research roles. The community has 523 part-time faculty and providers and many private practice physicians with part-time appointments and hospital privileges.

According to the last financial audit, the hospital generated \$950 million in revenue from patient care, other services, and grants in the last fiscal year. Year over year, revenues are down approximately \$10,000,000. We are considering limiting the number of Medicaid patients we accept due to low reimbursement for service. The operating expenses are increasing and are estimated to reach \$900 million next year. The hospital's assets total \$6 billion, while liabilities are approximately \$2 billion.

In addition to the main hospital campus in Havensport, there are four satellite campuses. The Lakeside Campus is 30 miles north of the main hospital but within the Havensport Metropolitan area. The Southport Campus is located 60 miles south in the city of Talens. These locations have substantial staff with inpatient capabilities. The East Regional Campus is located 80 miles from the main hospital in a rural community of less than 20,000 people. This outpatient facility is staffed Monday to Friday with nurse practitioners, who serve as the providers, and other staff, including nurses and front desk personnel. There are exam rooms where patients can see primary care and sub-specialists via telehealth. The West Regional Campus is located 60 miles from the main hospital in a community of 10,000 people and has outpatient facilities and staffing similar to the East Campus.

The organizational structure at the University of New Haven is complex. As President, I report to the New Haven Hospital

Board of Directors. There is also a dotted-line reporting relationship to the University of New Haven President, Brent Martinez, who was appointed to the role approximately six months before COVID. Previously, he spent 25 years with Procter and Gamble in various leadership and executive positions in the Latin American Division, eventually serving as its President. He served as P&G's Chief Innovation Officer and then Chief Operating Officer before New Haven University recruited him.

With a wealth of private sector experience, President Martinez has emphasized technological innovation, introduced data-driven user experience principles to our patient and customer service efforts, and enhanced the university brand by focusing on marketing. My counterparts at the university level include the Executive Vice President of Human Resources, Executive Vice President of Technology and Innovation, Executive Vice President of Finance and Operations, and the Provost/Executive Vice President of Academics.

As hospital President, my direct reports include the Vice President of Human Resources, Vice President of Technology and Innovation, and Vice President of Finance and Operations—all counterparts but technically one executive level below the executive staff at the university level. I do not have a Vice President of Academics; however, the Dean of the School of Medicine has a dotted-line reporting relationship with me to fill that role. His name is Dr. Phillip Wright. His

academic discipline is also anesthesiology, and he technically reports to the provost, just like the other school deans. I work closely with Dr. Wright, and we ensure the hospital and medical school operate efficiently. New Haven Hospital and the School of Medicine embedded within it generate more revenue than the other academic schools combined. Generally, 70% of our departments are focused on primary care, such as family practice, internal medicine, and pediatrics. The remaining 30% include sub-specialties such as cardiology, surgery, and gastroenterology. As dean, Dr. Wright's direct reports include the Associate Dean of Primary Care, the Associate Dean of Sub-Specialty Care, the Assistant Dean for Academics and Accreditation, the Assistant Dean for Technology and Innovation, an Assistant Dean of Human Resources, and an Assistant Dean of Finance and Operations.

Dr. Elizabeth Ralet is the Provost, and her tenure at New Haven University spans twenty-five years. She was appointed to this position when I moved into the role of hospital president and is the academic leader for all four schools within the university. In addition to the School of Medicine, the University of New Haven has a School of Pharmacy, School of Nursing, and School of Public Health. Dr. Ralet comes from my sub-specialty of anesthesiology. She is an established researcher and published author who is well-respected in the academic community. I am grooming her to be my successor, as I retire in 18 months.

Now that I have given you some background, I want to highlight some of our issues. The university has an unofficial practice of promoting people from within the organization. For example, the Associate Dean of Sub-Specialty Care will likely succeed Dr. Wright as Dean of the School of Medicine. Her background is in anesthesiology. This approach ensures continuity of leadership and the continuation of our strong culture of consensus building.

As a leader, President Martinez believes that internal competition fosters innovation and creates opportunities for better customer interactions. At times, this philosophy is at odds with the traditional academic culture of New Haven University. The school deans are experienced and have worked together for seven years, and I am starting to see elements of competition in their interactions. This is a concern for me.

You will also see a significant level of alignment between the positions at the university, hospital, and school levels. We have an Executive Vice President of Technology and Innovation, Vice President of Technology and Innovation, and Assistant Dean for Technology and Innovation. President Martinez created these new positions when he arrived a few months before the COVID crisis. These roles also exist within the Schools of Pharmacy, Nursing, and Public Health.

Pre-COVID, these positions were extremely valuable. New Haven Hospital developed a strategic plan to transform 10%

of its healthcare services into telehealth over the next five years. Once implemented, the hospital planned to study the impact of telehealth on patient care and evaluate whether expansion was an option.

The COVID crisis forced the university to accelerate its plans and create a 100% telehealth environment within eight weeks. The accelerated move toward telehealth was primarily top-down. The CEO made the case, and the Executive Vice President of Chief Technology and Innovation—along with the Vice President of Technology and Innovation and the Assistant Deans of Technology and Innovation—acted quickly to acquire hardware and establish basic processes to facilitate communication between physicians and patients. The primary care and sub-specialty department heads were responsible for scheduling.

Our focus on the mission and the situation's urgency allowed us to move quickly. People understood that we had no time to debate the pros and cons of this change. We had to keep moving forward and figure it out. This was a monumental achievement that required a significant amount of dedication from all employees. We were able to meet the needs of our patients during a crisis. While it is not popular to say, the reality is that their efforts saved the hospital financially.

Post-COVID, the hospital environment, under my direction, began to migrate away from telehealth. We gradually

integrated face-to-face appointments into our schedule six months after the initial move to 100% telehealth. Sub-specialists were the first to change their schedules. The complexity of the patients' cases requires that they receive priority. They were back to 100% face-to-face appointments within three months. Primary care moved slower, increasing face-to-face appointments by 10% each month for the next seven months. The decision was made to keep 30% of all appointments as telehealth. This has caused several issues:

- Nurses and staff: Turnover has increased by 100%. This employee population appears to prefer the telehealth environment. Our exit interviews suggest they are leaving and will accept less money for the convenience of working from home.
- Nurse practitioners: Turnover has increased by 42%. Approximately 76% of the patient care in the satellite campus is provided by this patient population. This group prefers the telehealth option.
- Physicians: The turnover among this employee group has remained steady. This employee group has resisted the move toward telehealth, as they have concerns about the quality of patient care.
- The dean of the Medical School agrees with the faculty.

In my opinion, the problem resides with the emphasis on telehealth. Post-COVID, these technology and innovation positions have been the source of great concern. Reporting to me within the hospital, there have been three Vice Presidents of Technology and Innovation in the last five years. They have a dotted-line relationship with the Executive Vice President of Technology and Innovation. The Vice President of Technology and Innovation, who reports to me, has an MBA from Vanderbilt University and has spent 10 years as an IT project manager for various startup companies. This is the only position on my team not filled by someone with a terminal degree. There has been similar turnover within the role at all levels of the organization.

I believe those working under the Executive Vice President of Technology and Innovation Officer became accustomed to making decisions that impact faculty, physicians, and patients without securing feedback. I would often hear about technology changes after the decisions were already made. There is a focus on technology upgrades, which often has unintended consequences for day-to-day patient interactions. There was very little talk of providing training when new platforms were integrated. Deans and department heads were expected to work with the integration specialists from the software provider to ensure training occurred.

To secure feedback on the changes that resulted from COVID-19, the university implemented a series of surveys.

Please see Appendix A, which contains six of the most concerning questions from the original 30-question survey. Appendix B contains all the questions asked in a pulse survey sent to patients. As president, I am attempting to balance the requests of a clearly evolving patient group that desires to receive patient care in the manner that is most convenient for them. At the same time, I need to address the divide among the employee group—providers and staff—as well as the divide between primary care and sub-specialists, who have different views regarding telehealth.

In my recent strategic plan, I announced an effort to move 90% of all patient care to a face-to-face environment. My approach does not fit with the CEO's vision; however, the physicians are the backbone of the hospital, and I take their opinions very seriously. They have my support.

Attachments in the form of two appendices are enclosed, to which the following confidentiality statement applies.

CONFIDENTIALITY NOTICE: The content of this e-mail, along with any attachments, is covered by state and federal law governing electronic communications and may contain confidential and legally privileged information. The information is intended only for the use by the individual or entity named above. If you are not the intended recipient, you are hereby notified that any disclosure, copying, or distribution or the taking of any action in reliance on the contents of this e-mailed infor-

mation is strictly prohibited. If you have received this e-mail in error, please contact the sender and delete the e-mail and any attachments from all computers.

I look forward to hearing from you about possible next steps.

Charles Smith, MD

President, New Haven Hospital

Appendix A: Overview of Employee Opinion Survey

The New Haven Hospital and the Medical School conducts employee opinion surveys every three years. These surveys are an important source of feedback for leadership. The completion percentage was approximately 50%.

An outside consultant facilitates survey administration. The consultant created a bank in questions that fall into 10 categories: (1) leadership, (2) total rewards, (3) climate/culture, (4) engagement, (5) collaboration, (6) communication, (7) working conditions, (8) training and development, (9) performance appraisals, and (10) compensation. For each survey cycle, only five categories are analyzed. The last survey was conducted two years ago and included the following categories: (1) climate/culture, (2) communication, (3) customer satisfaction, (4) engagement, and (5) training and development.

A Likert scale is used with the following response options: strongly disagree, disagree, neutral, agree, and strongly agree.

Partial results are reported below, along with comments that were deemed important by the hospital president. For this survey, providers are physicians and nurse practitioners. Staff are registered nurses, medical assistants, certified nurse assistants, schedulers, front desk staff, and IT Support.

1. Climate/culture: I am respected and valued here.
 - 71% of providers agreed or strongly agreed.
 - 49% of staff agreed or strongly agreed.
2. Communication: This organization encourages open communication.
 - 51% of providers agreed or strongly agreed.
 - 41% of staff agreed or strongly agreed.
3. Customer: The organization is committed to improving the face-to-face customer experience.
 - 31% of providers agreed or strongly agreed.
 - 35% of staff agreed or strongly agreed.
4. Customer: The organization is committed to improving the telehealth customer experience.
 - 32% of providers agreed or strongly agreed.
 - 36% of staff agreed or strongly agreed.

5. Engagement: My organization makes good use of my skills and abilities.
 - 70% of providers agreed or strongly agreed.
 - 35% of staff agreed or strongly agreed.
6. Training and development: I receive the training I need to do my job well.
 - 51% of providers agreed or strongly agreed.
 - 35% of staff agreed or strongly agreed.
7. Please provide us with your thoughts and suggestions on how we can make our hospital more successful. Please know that identifiable information such as your name will not be used to report survey results or comments.
 - a. Comment #1—This employee is a pediatric nurse practitioner. “I have been employed at New Haven Hospital for over 10 years. I am planning to leave within the next few months. Plenty of jobs for people with my skill set will allow me to work from home. I am willing to take less money for the convenience. Balancing a career and family is difficult. I don’t think people realize the stress and cost of driving to work daily in a busy city.”

- b. Comment #2—This employee is a primary care doctor. “I left a private practice to come to this university and work with underserved populations. I believe telehealth is compromising the quality of our patient care. For a 30-minute telehealth appointment, I spend 10 minutes navigating technology issues. This is supposed to be done by staff before the patient is let into my Zoom room. Many patients use cellular service or free Wi-Fi when connecting for an appointment. These services are unreliable, but our population has no choice, as paying for Wi-Fi is another bill many cannot afford. I am excited that we are returning to a 100% face-to-face model of care.”
- c. Comment #3—This employee is a primary care doctor. “I hate telehealth. I understand why we had to use it during COVID. However, we were never really trained on how to use this technology. The constant upgrades are a problem. We need either better training or a return to a 100% face-to-face model of care.”
- d. Comment #4—This employee is a sub-specialist doctor. “Things are going great. COVID seems like a minor issue now, as we resumed our normal approach to care three or four years ago.”

- e. Comment #5—This employee is a primary care nurse. “I love the mission of this hospital. I come from an underserved, diverse background and appreciate the opportunity to contribute to my community. While telehealth has its challenges, I love this model of care. My biggest issue is technology. Nurses spend a significant amount of time helping patients address technology issues. This is not my job.”
- f. Comment #6—This employee is an IT support professional. “When I was hired six years ago, my job was to help patients navigate the electronic medical records and electronic pay system. After COVID, my job now includes troubleshooting technology issues related to Zoom for customers on various computer systems and mobile devices. I am not trained for this type of work. The doctors don’t know anything about computers and don’t want to learn. They should help the patient and stop relying on people like me to address every issue.”

Appendix B: Overview of Customer Survey Responses

During the first three months of the year, the School of Medicine conducted a pulse survey to understand the customer experience in our hospitals. The survey is sent via text to patients

immediately after a visit with their primary care physician. We serve over 1.5 million patients every year. Two months of results from approximately 20,000 respondents have been analyzed and are outlined below.

1. Was your appointment via telehealth or face-to-face?

a. 75% of the appointments were face-to-face.

b. 25% were telehealth.

2. I would like to choose between telehealth and face-to-face visits. (Yes or no)

a. 87% yes

b. 14% no

3. Rate your interaction with the doctor and office staff during the face-to-face visit.

(Positive, neutral, or negative)

1. 73% positive

2. 12% neutral

3. 15% negative

(Positive, neutral, or negative)

1. 62% positive

2. 17% neutral

3. 21% negative

(Yes or no)

1. 73% yes

2. 27% no

(Yes or no)

1. 68% yes

2. 32% no

Conclusion

Organizations across the United States are struggling with technology integration and its impact on human capital. Key issues include balancing new communication platforms with existing human capital within the organization and enhancing the overall customer experience. Further rapid advances in technology create skills gaps for workers and customers. This is a challenge that organizations must solve to increase profitability. The organizational environment can become volatile when resistance to change from the internal workforce and external customers is not effectively managed.



Teaching Notes

Synopsis

The main issues with the case study revolve around four areas:

1. Understanding the organization's historical context and cultural dynamics is essential. Students are expected to conduct a foundational analysis that identifies the organization's cultural typology, structural framework, and prevailing leadership models.
2. The implications of nepotism warrant careful consideration, as they can significantly impact workforce morale, equity, and long-term performance outcomes.
3. The evolution of communication practices, particularly in response to technological advancements, represents a critical area for organizational assessment and strategic planning.
4. The appendix offers valuable insights designed to support the organization's commitment to continuous improvement and informed decision making.

Learning Outcomes

By the end of this case, readers should be able to:

1. **Diagnosis** the organizational culture of the organization.
2. **Evaluate** worker development surrounding telehealth in a hospital's COVID and post-COVID environment.
3. **Evaluate** the implementation of new technology related to telehealth in the COVID and post-COVID environment.
4. **Think** critically about the current telehealth environment and how best to address lingering issues that still impact physicians' ability to provide exceptional patient care.

Teaching Approach

Instructors should consider leading students toward solving the problem by examining interactions at the leadership, employee, and customer levels. At the leadership level, interactions among the leaders, between leaders and employees, and the leadership understanding of the customer base are important. At the employee level, their lack of engagement with leadership, the competitiveness within the employee group, and their belief that they cannot effectively impact the health

of their patients are concerns. For customers, the largest issues are the hospital's lack of understanding of their social issues, the superficial customer survey, and poor communication. Specific instructor notes are included at the end of each paragraph.

Discussion Questions

Discussion question #1 is connected to LO #1.

The first four paragraphs are background. New Haven University is very important to the state and local economy and community. They are financially stable; however, they have significant debt. Shifting political winds can move them from profitable to unprofitable in a short period of time. The board of directors is deeply concerned about this and seeks a president with substantial experience in managing budgets and overseeing large-scale operations. They are less concerned about academic qualifications and culture. Analyze the thinking of the board. What are the pros and cons of their approach? How will this impact the organization in five years? How will this affect the culture of an academic institution?

Discussion question #2 is connected to LO #1 and #2.

Talk about the pros and cons of a culture emphasizing internal promotions. Talk about the impact of nepotism on culture and the need for succession planning. There is a balance between creating continuity and the need for new ideas from

people with different experiences. Why does the president emphasize competition versus consensus? Is this a problem? How would you characterize or categorize the organizational structure of the hospital?

Discussion question #3 is connected to LO #1, #2, and #3.

Prior to COVID-19 and during the pandemic, the technology and innovation positions were valuable. Post-COVID, the positions have become a nuisance. Why? Is there some elitism at play? The competitive nature of someone from the private sector may not mesh with the consensus-building approach of someone from academia. The hospital president and deans are not invested in the success of the individuals they hire for this role, which contributes to the turnover issues. How do you help clarify the role? What were the hiring requirements for this position? Who developed them? How was the role defined within each school? How do you address the turnover issues?

Discussion question #4 is connected to LO #3 and #4.

The one-way communication that allowed for the accelerated implementation of technology worked only for a short period of time. There was no engagement with faculty along the way. Was this appropriate during a crisis? The organization believed it was, and people went along with it—or were they frustrated and decided to check out mentally? What is the experience level of the people developing the processes? Did

they secure feedback? How was the information communicated? The senior leadership did not establish feedback loops as new technology was introduced. Further, they did not solicit feedback regarding current processes. They stayed in crisis mode, making decisions quickly and without input.

Discussion question #5 is connected to LO #3 and #4.

Will the decision by the president fix the issues outlined above or make them worse? What type of strategic planning process did he follow? Why implement a plan not supported by the CEO? The president did not clearly communicate the decision regarding the reintegration of face-to-face patient care. He seems to have a bias towards sub-specialists.

Suggested Solutions

Let us discuss the possible solutions in the context of the learning outcomes.

LO #1: **Evaluate** the worker development surrounding telehealth in a hospital's COVID and post-COVID environment.

- Senior leadership needs to:
 - Communicate an impartial hiring philosophy to avoid nepotism.

- Rethink the role of the Chief Technology and Strategy Officer and prioritize enhancing the user experience. Further, this office needs to be collaborative and not top-down.
- Provide clarity regarding who is responsible for training.
- Deans need to:
 - Be aware of their biases toward to face-to-face patient care.
 - Provide training on how to lead a virtual environment.
 - Encourage deans to complete training on how to promote the importance of telehealth as a strategic advantage.
 - Focus on training needs.

LO #2: **Evaluate** the implementation of new technology related to telehealth in the COVID and post-COVID environment.

- The president is appropriately focused on the external environment. He needs to pay more attention to the internal environment. Perhaps a COO could provide operational leadership and ensure that all

areas are communicating. This is clearly not on the radar of the president.

- The AD of Technology and Innovation must establish more collaborative communication processes.

LO #3: **Think** critically about the current telehealth environment and how best to address lingering issues that still impact physicians' ability to provide exceptional patient care.

- The current approach for employee opinion surveys and customer surveys is inadequate and must be revised.
- This organization needs additional feedback loops.

Supplemental Resources

Center for Hybrid and Virtual Organizations
www.chvo.nu.edu

Rawlings, M., Allen, B., Bakari, M., Frame, J., Larsen, L., Menefee, S., Richie, K., Sanders, R., White, G. (Eds.) (2024). *Winning in the virtual workplace: 10 Experts reveal how to lead your remote team to success.* (<https://www.amazon.com/dp/B0D11X2PB3>)

Optimizing Remote Hiring and Onboarding

Shane Spraggs

TechCorp, a mid-sized AI-driven sales software company, transitioned to a fully remote work model in March 2020. With 100 employees distributed across different locations, the company sought to refine its remote hiring and onboarding processes to improve efficiency, engagement, and retention. This case study explores how TechCorp addressed challenges in virtual recruitment, assessed remote work competencies, standardized onboarding, and improved new-hire integration. The study provides insights into best practices for remote workforce expansion and structured onboarding, ensuring long-term success in a digital-first environment.

Introduction

TechCorp, a leader in AI-driven sales tools, has operated remotely since the onset of the COVID-19 pandemic. While the transition to remote work was initially successful, lead-

ership identified critical gaps in hiring and onboarding practices. Inconsistent experiences among new hires, difficulty assessing remote work capabilities, and the lack of standardized training led to challenges in employee retention and engagement. This case examines how TechCorp addressed these obstacles by refining its recruitment and onboarding processes.

Statement of the Problem

TechCorp faced several key issues in its remote hiring and onboarding process:

- Lack of a consistent candidate evaluation framework—Hiring managers struggled to assess remote work capabilities effectively.
- Inconsistent onboarding across departments—New hires reported varying experiences depending on their department, leading to disparities in training and preparedness.
- Low level of early employee engagement—New employees took longer to integrate into the company's culture and workflows due to the absence of structured orientation and support.

Scenario Context

To tackle these challenges, TechCorp partnered with external consultants to evaluate and optimize its hiring and onboard-

ing processes. The assessment focused on recruitment strategy, new hire integration, and performance tracking during the initial months of employment.

The Onboarding Delay Challenge

Prior to becoming a remote-only business, TechCorp hosted onboarding sessions every second Wednesday for new recruits. These in-person sessions covered mission, vision, values, policies, and company guidelines. Because new hires were already in the office, they had naturally familiarized themselves with their workstations, met team members, and begun engaging with their departments before the formal onboarding began.

When the company shifted to remote work, it maintained the same biweekly onboarding schedule—except now, new hires were at home, often waiting up to two weeks before receiving any structured guidance. Some managers compensated by introducing recruits to processes earlier, but this was inconsistent across departments. The orientation sessions themselves were delivered via video conferencing, making them no different from a pre-recorded session that new hires could have accessed on day one. This delay negatively impacted new employees' engagement, leaving them feeling disconnected from the company.

The Workspace Challenge

Once TechCorp became a fully remote business, another challenge emerged: productivity issues among recruits living in large metropolitan areas. With expensive rent and small apartments, many younger employees shared living spaces with roommates, leading to frequent distractions. This problem affected their ability to focus, collaborate effectively, and maintain work efficiency. Recognizing that no policy, process, or budget could fully address this issue, TechCorp implemented a new hiring requirement—candidates needed to have a quiet, dedicated workspace. To enforce this, they incorporated a workspace inspection into the hiring process. By verifying this requirement upfront, TechCorp significantly reduced productivity disruptions among new hires.

Strategic Actions Taken

Improving the Hiring Process

- **Improved candidate screening:** Implemented qualifying questions to assess remote work readiness (e.g., home office setup, time management skills, self-motivation, etc.).
- **Remote work simulations:** Candidates were tested on their ability to work asynchronously and communicate effectively via digital platforms.

- Video interview assessments: Hiring managers evaluated candidates' workspace setups and internet reliability.

Standardizing Onboarding for Consistency

- Company-wide orientation: Every new hire underwent a structured onboarding program that covered the company's mission, values, and best practices for remote work.
- Department-specific training: Managers provided tailored onboarding sessions to introduce new hires to department workflows.
- Role-specific training: Each new hire received a structured plan outlining job responsibility, success metrics, and initial objectives.

Improving New Hire Engagement

- Onboarding buddy system: Each new hire was paired with an experienced employee to guide them through the first few months.
- Self-paced learning modules: Pre-recorded training sessions allowed new employees to learn at their own pace.

- Regular check-ins and goal setting: Weekly one-on-one meetings were implemented to track progress and address challenges.

Ensuring Productivity from Day One

- Home office and ergonomic assessments: New hires received workspace assessments to minimize long-term health issues.
- Clear performance milestones: Structured performance reviews at 30, 60, and 90 days ensured alignment with company goals.

Outcomes and Results

- Reduced early turnover: The improved hiring process resulted in a 20% reduction in new employee attrition.
- Higher onboarding satisfaction: 90% of new hires reported feeling engaged and well-prepared for their roles after the first month.
- Increased productivity: Employees integrated into workflows 30% faster due to structured training and clear expectations.

- Stronger cultural connection: The onboarding buddy system improved social connections and reduced feelings of isolation among remote employees.

Conclusion

TechCorp's case highlights the critical role of structured hiring and onboarding in remote work environments. By refining candidate screening, standardizing onboarding, and enhancing engagement strategies, the company successfully improved new-hire retention and productivity. Organizations seeking to optimize their remote workforce can adopt similar best practices to build high performing, engaged teams.



Teaching Notes

Case Synopsis

This case centers on TechCorp, a mid-sized software company that transitioned to a fully remote model during the COVID-19 pandemic. It highlights two core challenges: inconsistent and delayed onboarding and productivity issues caused by inadequate remote workspaces. The case provides a detailed look at the company's efforts to refine hiring practices, establish structured onboarding, and improve early employee engagement. This scenario is particularly relevant for courses or workshops on remote leadership, human capital

management, organizational behavior, and strategic HR. It offers practical applications for assessing remote work readiness and designing onboarding experiences that promote productivity and a sense of belonging in distributed teams.

Purpose of the Case Study

The purpose of this case study is to highlight the strategies implemented by TechCorp to improve its remote hiring and onboarding practices. By addressing these challenges, the company aimed to enhance employee engagement, streamline training processes, and ensure long-term success for its distributed workforce. This case provides valuable insights for organizations navigating similar remote work challenges.

Learning Outcomes

By the end of this case, readers should be able to:

1. **Evaluate** the challenges and solutions associated with remote hiring and onboarding.
2. **Implement** best practices to improve virtual recruitment and new hire integration.
3. **Analyze** the impact of structured onboarding on employee engagement and retention.

Teaching Approach

This case study can be used in both academic and organizational training environments to explore effective strategies for hiring and onboarding in remote work settings. Instructors are encouraged to begin with a discussion around the question: “What does a successful remote onboarding experience look like from the employee’s perspective?”

Students can work individually or in groups to analyze the case and then apply the Virtual Leadership Framework to identify key success factors and challenges. A suggested group activity involves creating a mock onboarding checklist that categorizes onboarding activities into three levels: company-wide orientation, department-specific training, and role-specific training. This exercise encourages students to think critically about sequencing, ownership, and delivery format for each onboarding element.

For in-person or hybrid settings, instructors may organize a workshop where teams present their checklists and receive peer feedback. In online courses, students can collaborate via shared documents and present their work in discussion forums or virtual breakout rooms. This case is suitable for undergraduate and postgraduate courses in human resources, leadership, or organizational behavior, as well as for professional development workshops focused on virtual team management.

Discussion Questions

1. How can organizations ensure they are hiring candidates who are well suited for remote work?
2. What steps can be taken to standardize onboarding in a virtual environment?
3. How does early employee engagement impact long-term retention in remote teams?
4. What roles do performance tracking and goal setting play in new hire success?

Suggested Solutions

1. Implement structured remote work simulations as part of the hiring process.
2. Develop a company-wide onboarding program with consistent milestones.
3. Use onboarding buddies and mentorship programs to integrate new hires.
4. Conduct regular check-ins to assess engagement and address challenges early.

Supplemental Resources

Center for Hybrid and Virtual Organizations

CHVO.nu.edu

Rawlings, M., Allen, B., Bakari, M., Frame, J., Larsen, L., Menefee, S., Richie, K., Sanders, R., White, G. (Eds.) (2024).

Winning in the virtual workplace: 10 Experts reveal how to lead your remote team to success. (<https://www.amazon.com/dp/B0D11X2PB3>)

Spraggs, S., & Watson, C. (2023). *The power of remote: Building high-performing organizations that thrive in the virtual workplace.* Forbes Books.

Investing in Sustainable Success with a Dedicated Head of Remote Role

Megan Dilley and Sunny Ziemer

The Head of Remote is a new role in the modern workplace, taking on a variety of names and forms. It's essential that modern organizations are equipped with the knowledge and understanding of the vital role played by Head of Remote so they can proactively staff this position with expertise that aligns with their unique needs.

Sunshine Inc. is a hybrid 600-person environmental technology company committed to their hybrid work program, with workers spread across the United States, South America, and Europe. Prior to the 2020 COVID-19 pandemic, Sunshine Inc. employees worked on-site with headquarters in San Francisco and satellite offices in New York, Buenos Aires, and Barcelona. As of today, Sunshine Inc. has downsized office spaces in all locations in favor of working from home three

to four days per week, leaving office spaces to function as communal hubs. Sunshine Inc. has identified their need to hire a Head of Remote as an internal expert who can manage the hybrid program, but the Head of People recognizes they don't currently have the expertise to prepare for this role. So, they've hired you, Remote Work Strategy Consultant, to help. Through this case, you'll help prepare Sunshine Inc. for filling a new Head of Remote role by evaluating the organization's virtual operations and building a roadmap to support the Head of Remote's success.

Background

Managing Sunshine Inc.'s remote work program has become increasingly unwieldy as its demands have grown and changed over time. We have felt stuck in the current challenges of the program and are worried about it will impact continued success. Some of our leaders have called for more days back in the office, while others preferred looking for solutions to keep remote-first values at the forefront. Sunshine Inc. has hit an impasse and is no longer building for the future of our workplace strategy. Instead, we have reacted to complaints and issues as they arise, which has left us in a vicious cycle of frustration and disappointment with our current program. By remaining in a reactive state, Sunshine Inc. has been exposed to countless risks for poor employee experience, turnover, discrimination, noncompliance, and lawsuits.

We understand that a new role such as Head of Remote can be a vital element in building, nurturing, and adapting our virtual infrastructure for long-term hybrid success. However, we don't know where to start or what this new role should focus on. We've learned that the role of Head of Remote is to champion the practice as an integral business strategy, one that is paramount to maintaining business continuity.

Purpose of the Case

By working with you to evaluate the needs of the Head of Remote for our hybrid organization, Sunshine Inc. will be able to create a preliminary plan outlining what the new Head of Remote might to achieve in their first 12 months, putting us on the path to sustainability in remote work with a special emphasis on compliant practices, increased productivity, and employee satisfaction.

You'll use Distribute's 6 Pillars for Remote Success as an analysis framework for evaluating how the Head of Remote role will benefit Sunshine Inc., as well as for determining the necessary role plan and roadmap for the Head of Remote. By completing this case, you'll walk away with new or improved understanding that the necessary investment needed for long-term remote and hybrid success is ongoing. Additionally, you will understand that the subject matter is broad reaching into every facet of operations, requiring committed companies to set aside a role in their headcount in order to

be compliant, maintain or increase employee satisfaction, and ultimately help the organization reach their business objectives through a high functioning, satisfied, and safe workforce.

Case Information

Thank you for helping Sunshine Inc. analyze our virtual operations and build a plan for our future Head of Remote. Before we get started with the analysis, more background information may be useful. We want to share how we came to the decision to hire a Head of Remote. From our research, we learned that some organizations have decided to centralize workplace strategy under a Head of Remote or similar role, while others have shared responsibilities across multiple roles and departments. Some have relied on simply updating Human Resources policies. We have decided to create a Head of Remote role at Sunshine Inc. to address the unique challenges of managing a large, globally distributed workforce. This position will help us maintain a compliant and engaging remote work program that supports both employee well-being and organizational success. Additionally, we have learned there are two main types of Head of Remote: the internal advocate and the external advocate.

Internal advocate: For organizations with hybrid or fully remote models whose primary goal is to build and maintain distributed operations, ensuring an equal experience for the

entire workforce, focusing on building a virtual operations model and culture of location-irrelevance.

External advocate: For organizations with hybrid or fully remote models whose primary goal is to position themselves as a leader in the remote work industry to support product development or sales.

We determined the internal advocate best fits our need for maintaining our distributed work program, as we aren't looking to strategically position ourselves as a leader in remote work practices. However, if by way of our operations and employee experience we do become seen as a leader in remote work, we'll see that as a reward for our dedication and investment to building a sustainable hybrid work program at Sunshine Inc.

Now that we know we're seeking an internal advocate as our Head of Remote, we're ready to work with you, Remote Work Strategy Expert, to analyze our current operations and build a role plan and roadmap for the success of our future Head of Remote.

Let's get started on the analysis.

Analysis

Using Distribute's 6 Pillars for Remote Success (workforce, infrastructure, culture, management, workplace, and compliance), the Head of People for Sunshine Inc. provided re-

sponses below to a series of questions about our virtual operations as they relate to each pillar. These responses will help us decipher what the role plan and roadmap for the future Head of Remote will look like.

Workforce

Encompasses all support and strategies for the workforce from hiring to offboarding, such as talent acquisition, learning and development, and well-being.

Q: Are employees trained on the hard and soft skills necessary for remote work so they can be successful in a hybrid work environment?

A: Sunshine Inc. references some skills needed in onboarding materials, but outside of that, they're not addressed again unless a performance issue arises.

Infrastructure

Encompasses the technology and practices that support workflows including software, hardware, and communication expectations.

Q: Do employees across all time zones have a standard to follow for response time to messages so they can manage their productivity and communication? Is this information stored in a communication charter?

A: It varies from team to team and location to location. We hire people who are dedicated to the work we do, so it goes without saying that they take pride in getting back to people quickly. It seems like most people respond within the same business day and that works just fine.

Culture

Encompasses a foundation of cultural alignment through day-to-day work practices, rituals, rewards, and DE&I based on our mission, vision, and values.

Q: Do employees across the globe feel valued and like equal members of the team, whether they are working in the office or at home? A: Each location has a very unique set of events that happen in person. We use these events to draw people to the office and give them something fun through which to connect with each other. So far, days when employees work from home are the “head-down” days when we don’t expect much culture-related activity.

Management

Encompasses leadership training, performance management, and goal setting practices.

Q: How do team members and managers stay aligned and transparently see what everyone else on their team is working on?

A: We have a very friendly culture in which people chat about work and openly share what they are working on. We have an “if you have a question, just ask” mentality. Some teams like using project management systems like Asana to track tasks, but this varies.

Workplace

Encompasses the setup, safety, and continuity of workplaces in and out of the company office location.

Q: Have you given employees clear guidelines for setting up their home offices, and do you know whether their workspaces meet safety and productivity standards?

A: We check in to ask if they need anything when they join the company, but after that we expect we’ll hear from them if additional support is needed.

Compliance

Encompasses the laws, regulations, and comprehensive policies necessary to protect both employees and employers.

Q: Does Sunshine Inc. have a comprehensive remote work policy in place that provides employees with the guidelines, norms, and expectations for remote work at the company?

A: We updated our employee handbook to include a section about hybrid work rules for days spent working at home or in the office, but that’s it.

Results

Good news! The company has begun the hard work of converting their operations to hybrid best practice; however, across the board in workforce, infrastructure, culture, management, workplace, and compliance, it is apparent that Sunshine Inc. still has work to do. In all examples, Sunshine Inc. has started but not completed the work or simply does not know the depth to which they need to go in each category in order to support productivity and promote equal employee experience. A Head of Remote will certainly be able to help Sunshine Inc. build out their hybrid work program and ensure its long-term success. It's great that you made the decision to invest in a Head of Remote who focuses on internal advocacy.

Conclusion

Based on the information gathered in the analysis, Sunshine Inc. has made the right decision to hire an internal advocate Head of Remote to continue the process of converting their operations to virtual and maintaining and enhancing the program long-term. In the creation of the role plan and roadmap, it will be important that Sunshine Inc. and the Remote Work Strategy Expert take into consideration each of Distribute's 6 Pillars for Success (workforce, infrastructure, culture, management, workplace, and compliance) and the current state of operations within each pillar to help prioritize

objectives for the future Head of Remote. Sunshine Inc.'s commitment to hybrid work success by hiring a Head of Remote is a big step in the right direction towards ensuring company resources, employees, and practices support access, equality, and overall business strategy.



Teaching Notes

Synopsis

This case provides a framework for learning about and evaluating the need for a Head of Remote role that would be most appropriate for a distributed company that wishes to invest in a best-in-class, sustainable, distributed work program. It gives learners the foundation to conduct an initial analysis on the organization's virtual operations, make informed decisions about the scope and responsibilities of the Head of Remote role that best fits the company's needs. Learners can then begin building a role plan and strategic roadmap for the position.

Learning Outcomes

By the end of this case, readers should be able to:

1. **Describe** the purpose, objectives, and benefits of the Head of Remote role. Learners will be introduced to

the role of Head of Remote and how the position contributes to organizational success and why it is increasingly important for distributed companies.

2. **Assess** the need for a Head of Remote in their virtual operations. Learners will be able to recommend the specific responsibilities and reporting structure that best fit the organization's needs.
3. **Identify** the qualifications, skills, and role objectives needed for an effective Head of Remote. Learners will use this information to draft a tailored job description and develop a strategic role plan for recruiting or promoting the right candidate for the position.

Teaching Approach

This case can be utilized in both academic and organizational settings. Learners can work together to utilize the analysis included or conduct their own analysis of the organization using the questions included to build a preliminary role plan and roadmap for the future Head of Remote.

Discussion Questions

1. Why would an organization need a Head of Remote?

2. What qualifications or skills would you look for in an internal advocate?
3. What qualifications or skills would you look for in an external advocate?
4. What would you look for to indicate cultural alignment for a hybrid company?
5. How would you rank the 6 Pillars of Remote Success in order of importance, and how would you recommend the company prioritize projects for their Head of Remote?

Suggested Solutions

1. Remote work lacks consistency and regulation across states and countries, making remote work an ever-changing landscape. Leaders must be equipped to work towards proactive visions for how we work while also adapting and reacting to the immediate and changing needs of laws, regulation, and society. Organizations need a dedicated champion for hybrid and remote work to function as an expert on best practice. They also need a cross-functional partner to advocate for change and long-term success throughout the organization. Like dedicated roles for marketing, revenue, sales, operations, technology, finance, and human resources, having a Head

of Remote is essential for distributed organizations and worthy of ongoing key performance indicators (KPIs) to support an entire role.

2. An internal candidate should have a proven record of remote work experience, cross-functional leadership skills, and experience working on company culture, people teams, HR, or in other employee experience-related functions.
3. An external candidate should have a marketing and communications background and an ability to work cross-functionally with business operations and people teams to evangelize remote work practices. Public speaking skills and an influencing profile are needed.
4. Mission, vision, and values are imbued through the employee experience, from onboarding, day-to-day workflows and communications, and performance reviews to rituals and events. Location must be irrelevant in a successful remote and hybrid work environment. Equality of experience is paramount.
5. All pillars are important, and many overlap. Thinking from a highest-to-lowest-risk perspective can be helpful. If there are things that need to be addressed that fall under the compliance pillar, they should be taken care of as soon as possible to help alleviate legal

risk or other concerns. From there, look for ways to be efficient and overlap initiatives between categories. Use the pillars as a framework for building organizational objectives and KPIs to make sure you are covering everything.

Supplemental Resources

Center for Hybrid and Virtual Organizations - chvo.nu.edu

Free eBook: *Winning in the virtual workplace: 10 Experts reveal how to lead your remote team to success.* (<https://www.amazon.com/dp/B0D11X2PB3>)

Whitepaper: Do You Need a Head of Remote?

<https://www.distributeconsulting.com/whitepaper-head-of-remote/>

Whitepaper: How to Adapt Company Culture for Remote Work

<https://www.distributeconsulting.com/how-to-adapt-company-culture-for-remote-work>

Article: Does Your Company Need a Head of Remote?

<https://www.distributeconsulting.com/insights/does-your-company-need-a-head-of-remote>

Article: Going Hybrid? 3 Risks to Mitigate

<https://www.distributeconsulting.com/insights/risksofhybrid>

Article: Measuring Success with Hybrid Work

<https://www.distributeconsulting.com/insights/measuring-success-hybrid-working>

Article: Habits to Ensure Equality in Your Hybrid Team

<https://www.distributeconsulting.com/insights/habitsforhybridteams>

Distribute Consulting's 6 Pillars for Remote Success

Based on years of remote operations experience and research, Distribute developed the 6 Pillars for Remote Success. The Pillars are used to evaluate an Organization's Virtual Operations, assessing the degree to which the organization is following best practice, helping to put them on the path to leveraging remote work as a true business strategy, while maintaining a compliant distributed work program that supports workforce productivity, connection, and wellbeing, offering equal employee experience, and minimizing liability for both employer and employee, ensuring remote and hybrid work is a lasting solution.

The 6 Pillars for Remote Success

Workforce: encompasses all support and strategies for the workforce from hiring to offboarding, such as talent acquisition, learning and development, and well-being.

Infrastructure: encompasses the technology and practices that support workflows including software, hardware, and communication expectations.

Culture: encompasses a foundation of cultural alignment through day-to-day work practices, rituals, rewards, and DE&I based on mission, vision, values.

Management: encompasses leadership training, performance management, and goal setting practices.

Workplace: encompasses the setup, safety, and continuity of workplaces in and out of the company office location.

Compliance: encompasses the laws, regulations, and comprehensive policies necessary to protect both employees and employers.

Team Building as a Remote Strategy: A Tech Company's Journey into Human-Centricity

Emi Barresi, DSL

This case explores the transformative journey of a global software and application development company that used intentional team building as a cornerstone strategy to foster engagement in a remote work environment. Facing challenges in collaboration and engagement among remote and dispersed teams, the organization implemented people-centric leadership practices and leveraged collaborative technologies. These efforts improved communication, trust, and camaraderie among employees. The company created a culture of adaptability and innovation by aligning team-building initiatives with organizational values. Readers will gain insights into the critical role of team building in virtual settings, evaluate the use of technology to bridge geo-

graphical gaps, and apply person-centric practices to motivate employees and strengthen organizational culture.

Introduction

TechTime a fictitious name for a real-world software and application development company that operates globally with teams across six continents, is deeply committed to its customers. Known for its innovative products that cater to customer needs and its agility in responding to market changes, the company faced challenges in maintaining employee engagement and collaboration after transitioning to a fully remote model in response to global events. Although TechTime had always maintained a remote-first workforce, the COVID-19 pandemic led leadership to close their offices and maintain fully remote teams. These teams are in seven different countries across four continents, so they work with distributed teams and remote resources that bring a diversity of culture and thought to the organization.

The Opportunity

Leadership at TechTime identified a growing sense of disconnection and decreasing collaboration among employees, resulting in reduced trust. The challenge was to foster a sense of community and engagement within their teams despite geographical dispersion. Leaders had believed that because the organization had a remote culture before COVID-19, it would be a seamless transition during the pandemic, as only

a handful of employees had gone into the office regularly. However, when entire regional dynamics changed, social interactions were reduced and employees felt disconnected and isolated at varying levels, something leaders initially neglected to consider. With declining employee satisfaction scores, increased delivery times, and reduced innovation in project outcomes, the company took a proactive approach by making team building a strategic priority, demonstrating determination to overcome the challenges.

Significance of the Case

As organizations increasingly embrace remote and hybrid work models, this case study offers valuable and actionable insights into fostering and sustaining a cohesive virtual workforce. Addressing the challenges of engagement, communication, and collaboration in distributed teams, the study equips leaders with practical strategies and tools that are reassuringly effective. These strategies help strengthen connections, enhance team performance, increase resource engagement for enhanced product outcomes, and promote a culture of trust and inclusivity that leads to higher productivity. The significance of these insights lies in their direct applicability, enabling leaders to ideate and implement effective human-centric solutions tailored to the unique needs of their organizations. Leaders of organizations with engagement challenges who want to maintain remote workforces balance risk and opportunity when crafting their working

arrangements. Using TechTime's initiatives as a template and implementing the same strategies will result in real-world success.

Situational Context

TechTime, a mid-sized software and application development company, faced growing challenges within its fully remote teams as collaboration and engagement declined. Leaders noticed both reduced engagement scores and delays in product timelines. Senior leadership asked managers to investigate further after a few critical deadlines were missed. Managers intentionally sought to uncover the issues their teams were facing through targeted retrospective discussions using a "prime directive," a term coined by Norm Kerth (2001) in his book about project retrospective meetings. "Regardless of what we discover, we understand and truly believe that everyone did the best job they could, given what they knew at the time, their skills and abilities, the resources available, and the situation at hand." Leaders discovered a lack of trust, feelings of disconnection and loneliness, and fears about losing jobs, as COVID-19 resulted in staff reductions in many organizations. These issues manifested in siloed work practices, decreased communication, and a noticeable erosion of team cohesion, which ultimately affected productivity, delivery, and innovation. Recognizing the need for a solution, leadership proactively launched the "Ignition Initiative," a comprehensive, themed program designed to revitalize team dynamics

and cultivate a human-centric work culture. This initiative prioritized intentional team-building activities, transparent communication practices, and human-centric leadership approaches, aiming to reconnect employees, rebuild trust, and align teams around shared vision and goals—even in a fully remote, global environment—using symbolism from igniting flames and burning fire.

Strategic Decisions and Actions

Key strategies implemented as part of the “Ignition Initiative,” which significantly improved engagement, experience, and overall delivery for teams, included:

- **Fueling Connections Through Structured Virtual Exercises:** Leaders designed weekly team-building activities to ignite collaboration and spark creativity. These included engaging activities such as virtual escape rooms, scenario-based problem-solving games, competitive or gamified engagements such as Family Feud, and group brainstorming sessions. These virtual exercises fanned the flames of teamwork and innovation.
- **Stoking the Fire of Informal Social Interactions:** Leadership introduced scheduled virtual coffee breaks and “watercooler” Slack channels to keep the embers of casual, non-work-related conversations alive. Channels for “culinary lovers,” “pet pho-

to sharing,” and cultural events across the globe helped create a sense of warmth and belonging. Monthly on-camera lunches also offered teammates a chance to build stronger bonds. These informal moments acted as kindling for lasting team camaraderie, creating humorous and memorable stories that became part of the team’s culture.

- **Igniting Spirits with Customized Recognition Programs:** The company introduced weekly shoutouts and virtual badges to keep morale burning bright and recognize individual and team achievements. Delivered through Slack plug-ins, this approach made recognition simple and accessible. These efforts reinforced a culture of appreciation, ensuring everyone felt their contributions were valued.
- **Harnessing Collaborative Technologies to Keep the Flame Alive:** The team strategically utilized digital tools, such as Zoom for camera-on meetings and Slack for instant communication, and project management platforms like Trello and Jira to coordinate seamlessly across remote teams. Leaders created tool integrations and offered training to stoke adoption rates and optimize software use, ensuring the collaborative fire burned steadily across the organization.

Rationale Behind Decisions

The leadership team understood that addressing employee disengagement required a balanced approach: fostering trust and camaraderie while creating opportunities for meaningful connection using enhanced technology. They recognized that disengagement stemmed from operational inefficiencies and a need for interpersonal bonds within the remote work environment, as the pandemic impacted human social dynamics even for individuals who previously enjoyed remote arrangements. To tackle this, leaders introduced structured activities and invested in software to support the “Ignition Initiative” and provide clear frameworks for collaboration, ensuring teams could work cohesively toward shared product vision and collaboration goals. The fire symbolism resonated cross-culturally, empowering employees to share the significance of the theme to their unique systems. At the same time, informal interactions—such as virtual social events and casual check-ins from managers were incorporated to nurture organic relationships and create a sense of belonging. This balanced approach, carefully designed to address the operational and social aspects of the issues, was rooted in the belief that trust and human connection are foundational to sustaining engagement and productivity in remote teams.

The initiative led to:

- A 35.92% improvement in employee satisfaction scores within six months.
- Increased innovation and collaboration, as seen in the delivery of four new products ahead of schedule.
- Enhanced trust and communication with employees reporting a stronger sense of belonging and many relationships enduring beyond the organization as future growth opportunities.

Carrying the Torch Forward

TechTime's challenges with remote engagement underscored the critical need for strategic team building and human-centric leadership practices in a virtual work environment. By addressing these issues head on, the company demonstrated how intentional efforts to foster trust, collaboration, and connection can transform disengaged or disconnected teams into cohesive, high-performing units. The success of the "Ignition Initiative" hinged on aligning every strategy with the organization's core human-centric values, ensuring that initiatives were not only practical but also resonated with the team's shared vision and culture. TechTime's journey serves as a compelling example of how prioritizing people-centered approaches in global remote work environments can lead to

meaningful and sustainable improvements in team engagement and morale and overall organizational performance.

Key Takeaways

- **Intentional Team Building:** Thoughtfully designed team-building activities play a vital role in fostering trust, strengthening collaboration, and breaking down silos in remote work settings, ultimately enhancing team cohesion.
- **Human-Centric Leadership Practices:** Leadership approaches should prioritize empathy, cultural agility and inclusivity, and genuine care for employee well-being to significantly boost satisfaction, engagement, and overall performance.
- **Effective Use of Collaborative Technologies:** Leveraging the right digital tools, such as communication and project management platforms, is essential for bridging geographical gaps, enabling seamless collaboration, and maintaining productivity in distributed teams.



Teaching Notes

Synopsis

This case study follows TechTime, a software and application development organization, through its journey to revitalize employee engagement and collaboration across a global and fully remote workforce. Despite the pre-pandemic remote-first organizational design, transitioning to a completely remote workforce exposed underlying trust, communication, and cohesion issues within various teams. A human-centric leadership approach that prioritized empathy and understanding was the key to their success.

In response to growing challenges, organizational leaders launched the “Ignition Initiative” to reignite engagement, cultivate a culture of innovation and adaptability, and build strengthened teams through targeted efforts focused on collaborative interactions and thoughtful technology integration. Through weekly team exercises, informal connection points, customized recognition systems, and purposeful tools, leaders at TechTime measurably elevated employee satisfaction, resulting in an increase in innovation based on set KPIs and in communication and trust within teams across the company.

Purpose of the Case Study

This case study explores how deliberate and intentional team-building strategies, combined with human-centric

leadership practices, can effectively address engagement challenges in remote work environments. By examining the unique dynamics of remote teams, the study highlights the critical role of fostering connection, trust, and collaboration among team

members, despite physical distance. It also emphasizes how empathetic and people-focused leadership approaches can create a supportive culture that enhances productivity, morale, and overall team cohesion in a virtual setting. Through this lens, the case provides actionable insights and practical frameworks for leaders navigating the complex systems created by global remote team engagement.

Learning Outcomes

By the end of this case, readers should be able to:

1. **Explain** the critical role of intentional team building in virtual settings.
2. **Demonstrate** the use of person-centric leadership practices to motivate and engage employees.
3. **Evaluate** the effectiveness of collaborative technologies in fostering connection and productivity.
4. **Design** and **refine** team engagement strategies aligned with their organizational culture.

Teaching Objectives

1. Explore the challenges and solutions for engaging dispersed teams.
2. building and collaborative tools on virtual engagement. Analyze the impact of team
3. Apply person-centric leadership concepts to real-world scenarios.

Teaching Approach

- Open discussions with questions like, “What barriers to engagement exist in virtual work environments?”
- Facilitate group exercises to design team-building initiatives relevant to organizational valued and cultural needs.
- Use role play to practice empathy-driven leadership techniques.

Discussion Questions

1. What strategies can leaders employ to foster trust in remote teams?
2. How can organizations balance structured activities with informal interactions?

3. In what ways can technology support or hinder engagement? How can you determine what tools teams need?
4. How can team-building initiatives be aligned with organizational culture?

Suggested Solutions

1. Use surveys to tailor team-building activities to employees' interests and feedback. Use technology tools to mimic successful in-person strategies, such as collaboration add-ons in existing tools, gaming software, and work management software.
2. Invest in scalable collaborative tools that support diverse team needs and consider geographic access, cultural agility, and employee interest.
3. Changes where required. Without intentional design or adjusting use based on evolving team and location needs, technology can create barriers and separation instead of connectivity. Establish clear communication channels and intentional feedback mechanisms to make incremental

4. Leaders should model cultural norms and expected behaviors. Implemented strategies should integrate core values and sustain or adjust norms with intention.

Supplemental Resources

Burkus, D. (2022). *Leading from anywhere: the essential guide to managing remote teams*. Mariner Books.

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CHVO.nu.edu

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Rawlings, M., Allen, B., Bakari, M., Frame, J., Larsen, L., Menefee, S., Richie, K., Sanders, R., White, G. (Eds.) (2024). *Winning in the virtual workplace: 10 Experts reveal how to lead your remote team to success*. (<https://www.amazon.com/dp/B0D11X2PB3>)

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A Note to the Reader

A quick favor...

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Authors and Editors

Emi Barresi, DSL

Emi Barresi is a human-centric global agile leader with 15 years of remote experience in tech and organizational transformation. With a doctorate in strategic leadership (DSL) and a master's in I-O psychology, she brings deep expertise in ethics-focused remote teaming, agile and organizational transformation, and future-ready leadership. Emi developed the HEARTH Leadership Model, promoting ethical, tech-integrated, and flexible work practices. She's led transformations for Fortune 100 companies and medical organizations, blending AI, robotics, agility, and human values to elevate team performance. Her award-winning work champions equity, innovation, and people-first leadership in the future of work.

Megan Dilley

Megan Dilley has developed a successful career in management, organizational development, client services, and operations consulting for co-located, hybrid, and fully remote

organizations in the private and public sector, ranging from early-stage startups to global enterprises. She is a passionate remote work advocate and serves as the Director of the Remote Work Association. Megan is based in San Francisco, California, and will travel great distances for a delicious meal.

John Frame, DPhil

John Frame has a DPhil from the University of Oxford and coaches part-time faculty in a fully remote environment at National University's College of Business, Engineering, and Technology. His books and audiobooks are: *Homeless at Harvard*; *7 Attitudes of the Helping Heart*; and a short read, *Increase Your Leadership Impact: 6 Simple Strategies to Connect with God's Wisdom, Make Tough Decisions, and Inspire Those Around You*.

Christine Gehrke, DBA

Christine Gehrke is a full-time lecturer in finance for the Eastern Washington University online MBA program. Working alongside Dr. Lisa M. Harris in conducting research on hybrid/remote work environments, along with having practical experience in managing teams and students in a remote work environment, she has both practical and theoretical expertise in various types of work environments. Dr. Gehrke earned her bachelor's degree from Ohio State University,

MBA from Seattle University, and Doctor of Administration (DBA) from City University of Seattle. She lives in Walla Walla, Washington, with her husband of over 30 years.

Lisa Harris, DBA

Lisa Harris serves in the Office of the President at National University (NU), a leading nonprofit institution of higher education, where she supports key strategic initiatives aligned with institutional priorities and presidential efforts, including the Presidential Doctoral Scholarship Program and CoWork @ NU. Dr. Harris, with over 25 years of experience across business management, higher education, and administration, is a seasoned professional. She is also the owner of Hybrid & Remote Work Insights, a consulting service offering expert guidance, trends, and executive support for hybrid and remote work environments. Her thought leadership is featured in *Global Business and Leadership Volume 2* by City University of Seattle. Dr. Harris holds a bachelor's degree from Saint Augustine's University, a master's from National University, and a Doctor of Business Administration from City University of Seattle. Originally from North Carolina, she has called San Diego home for over 30 years.

Maranda Johnson-Hartzog, MS ODL

Maranda Johnson-Hartzog was born and raised in Newberry, South Carolina. She earned both her Bachelor of Arts in psychology and her Master of Science in organizational develop-

ment and leadership from Newberry College. Maranda has worked in the primary health care field since 2018 and currently serves as the Clinical Practice Manager at a Pediatrics Clinic. Outside of her professional life, she enjoys reading, traveling, and cooking. Maranda is passionate about lifelong learning and plans to continue her educational journey by attending law school in 2026.

Stephanie Menefee, PhD

Stephanie Menefee is a Full Professor of Conflict and Leadership and founder of Floreo Collective, LLC. An accomplished leadership consultant, Stephanie specializes in leadership development, organizational culture, conflict resolution, and data-driven change, and is widely sought after for her dynamic leadership and team-building workshops that have transformed the way teams collaborate and innovate. With extensive experience in higher education, serving in roles from professor to dean, Stephanie is committed to supporting nontraditional learners and student success. Her research and publications span leadership, collaboration, and peace and conflict studies, and in practice she is dedicated to creating environments where individuals and organizations can learn, grow, and thrive together.

Melody Rawlings, EdD

Melody Rawlings is a respected leader, educator, and author with more than a decade of experience leading and developing remote teams. As Director of the Center for Hybrid and Virtual Organizations, she focuses on advancing leadership excellence in virtual and hybrid work environments. A published researcher, she has authored scholarly articles and delivered international presentations on leadership, emotional intelligence, and remote collaboration. She is the co-author of *Determining Leadership Potential: Powerful Insights to Winning at the Talent Game* and served as editor of CHVO's first book, *Winning in the Virtual Workplace*. Her work has appeared in peer-reviewed journals and in books published by Cambridge, Routledge, IGI Global, and Kendall-Hunt.

Kathy Richie, DM, MBA

Kathy Richie is an Associate Professor and Academic Program Director for the Doctor of Business Administration (DBA) and Doctor of Philosophy-Business Administration (PhD-BA) programs at National University. She serves as chairperson for dissertation committees and teaches leadership and management strategy doctoral level courses. Her background blends academic practice and business acumen with many years of hands-on remote work experience as a Global Negotiator Manager for a large multinational high-tech corporation.

Randee Sanders, DMgt

Randee Sanders transforms leaders and organizations with her bold and unapologetic approach to leadership. As the founder of RL Sanders & Associates, LLC, and the Design Not Default Academy (DND), she empowers ambitious women and forward-thinking organizations to disrupt norms, shatter glass ceilings, challenge the glass cliffs that threaten their success, and design leadership on their terms. With over two decades of experience, Dr. Randee has witnessed brilliant women step boldly into their power, rewrite the rules, and transform their careers and entire industries. Her expertise in driving innovation, resilience, leadership development, and fostering true self-expression makes her a trailblazer in redefining what leadership means in today's ever-evolving workplace.

Shane Spraggs

Shane Spraggs is a seasoned business leader, productivity expert, and Forbes best-selling author of *The Power of Remote*. As the founder of Future of Productivity, he helps successful businesses get unstuck through AI-driven efficiency, streamlined workflows, and strategic planning. With a career spanning over 25 years, Shane has held leadership roles at companies like Virtira, Minga, and Disney Online Studios Canada, specializing in remote work, project management, and team performance. A sought-after speaker and consultant,

he leads workshops and training sessions on remote leadership, business process optimization, and project management. Shane also teaches at Okanagan College and serves the Kelowna business community through initiatives like Casual Tuesdays Networking. When he's not shaping the future of work, you'll find him hiking in beautiful British Columbia or strategizing the next big idea.

Gleb Tsipursky, PhD

Gleb Tsipursky was named “Office Whisperer” by *The New York Times* for helping leaders overcome frustrations with hybrid work and Generative AI. He serves as the CEO of the future-of-work consultancy Disaster Avoidance Experts. Dr. Gleb wrote seven best-selling books, and his two most recent ones are *Returning to the Office and Leading Hybrid and Remote Teams* and *ChatGPT for Thought Leaders and Content Creators: Unlocking the Potential of Generative AI for Innovative and Effective Content Creation*. His cutting-edge thought leadership was featured in over 650 articles and 550 interviews in *Harvard Business Review*, *Inc. Magazine*, *USA Today*, CBS News, Fox News, *Business Insider*, *Fortune*, *The New York Times*, and elsewhere. His writing was translated into Chinese, Spanish, Russian, Polish, Korean, French, Vietnamese, German, and other languages. His expertise comes from over 20 years of consulting, coaching, and speaking and training for Fortune 500 companies from Aflac to Xerox. It also comes from over 15 years in academia as a behavioral sci-

entist, with eight years as a lecturer at UNC-Chapel Hill and seven years as a professor at Ohio State. A proud Ukrainian American, Dr. Gleb lives in Columbus, Ohio.

Gary White, PhD

Gary White is a Professor of Business and Leadership and Chair of Doctoral Dissertations at National University. He is the Academic Program Director for the Master of Science in Organizational Leadership Program. He has been involved in higher education for over 34 years, teaching business, management, marketing, organizational leadership, and quantitative/statistical analysis at several universities over the past three decades. He has won numerous awards and earned recognition for teaching excellence. He has been the owner of a small business consulting firm since 1991, which has helped numerous entrepreneurs start their new business ventures. Dr. White has a BA in environmental sciences from La Salle University, an MS in organizational dynamics from the University of Pennsylvania, and a PhD in educational leadership/systems, with a specialization in marketing and higher education, from Union Institute University.

Eugene Wilkerson, PhD, SPHR

Eugene Wilkerson is a Professor in the Department of Leadership, Management, and Human Capital. Dr. Wilkerson holds a PhD in educational leadership, research, and policy from the University of Colorado-Colorado Springs, an MS in

organizational leadership and ethics from St. Edwards University, and a BS in political science from Middle Tennessee State University. He holds the prestigious Senior Professional in Human Resources Certification (SPHR) from the Society for Human Resource Management. He recently completed a Strategic Management Performance Systems Certificate at George Washington University. Dr. Wilkerson teaches undergraduate and graduate-level human resources and leadership courses. He has served on various community boards for organizations such as the Denver/Boulder Better Business Bureau and Habitat for Humanity of Colorado.

Rochelle Cason-Wilkerson, MD

Rochelle Cason-Wilkerson is an assistant professor at the University of Colorado Medical School Department of Pediatrics. Dr. Cason-Wilkerson holds an MD from Meharry Medical College School of Medicine, a Master's in public health from the University of Colorado, and a Bachelor's in biology from Spelman College. Prior to her career in academia, she was an officer in the United States Army, serving in various positions, including Brigade Surgeon for the 4th Infantry Division. Dr. Cason-Wilkerson's research agenda focuses on childhood obesity. She is a published author and experienced conference presenter. She has served on various community boards, including the Executive Board of the Hope Center and the New Century Scholars program.

Sunny Ziemer

Sunny Ziemer is a remote work expert specializing in distributed culture and communications. As a veteran in virtual management and operations, she brings a wealth of experience in navigating the complexities of distributed collaboration, recognizing both potential pitfalls and opportunities for growth. Drawing on her background as an operations manager for a fully distributed startup, Sunny leverages her deep expertise in virtual change management to help businesses optimize their remote and hybrid teams.

Stay in Touch

Want to continue learning about how to be a first-class leader of hybrid and remote employees? Stay in touch with the Center for Hybrid and Virtual Organizations.

National University's Center for Hybrid and Virtual Organizations (CHVO) is a leading authority on hybrid and virtual learning and work environments, connecting research, practice, and innovation to shape the future of education and workforce success. Serving as a collaborative platform, CHVO partners with remote work experts to integrate research and practical knowledge, with the goal of disseminating the latest developments and technologies associated with remote work. For on demand webinars, podcast episodes, and other resources to help you lead a virtual organization, please visit chvo.nu.edu.