

Handbook of Research on

Challenges for Human Resource Management in the COVID-19 Era



**Paula Cristina Nunes Figueiredo, Eduardo Luís de Campos
Soares Tomé, and José Carlos Dias Rouco**

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Handbook of Research on Challenges for Human Resource Management in the COVID–19 Era

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List of Contributors

Aktepe, Şafak Öz / <i>Istanbul Bilgi University, Turkey</i>	66
Amah, Okechukwu Ethelbert / <i>Lagos Business School, Pan Atlantic University, Nigeria</i>	225
Amsler, Anna / <i>Independent Researcher, Mexico</i>	41
Arjunan, Satya Nandini / <i>B.M.S. College of Engineering, India</i>	1
Ascenso, Loide Raquel / <i>ISLA Santarém, Portugal</i>	187
Avanesh, Neetha Mary / <i>Christ University, India</i>	1
Bergum, Svein / <i>Inland Norway University of Applied Sciences, Norway</i>	163
Birsel, Melek / <i>Marmara University, Turkey</i>	66
Calvard, Thomas Stephen / <i>University of Edinburgh Business School, UK</i>	403
Cascão, A. Ferreira / <i>Instituto Politécnico de Setúbal, Portugal</i>	243
Cassar, Vincent / <i>University of Malta, Malta</i>	269
Conway, Neil / <i>Royal Holloway, University of London, UK</i>	269
Crowder, Cindy L. / <i>Indiana State University, USA</i>	136
Dastane, Omkar / <i>UCSI Graduate Business School, UCSI University, Malaysia</i>	358
Deren, Aldona Malgorzata / <i>Wroclaw University of Science and Technology, Poland</i>	23
Eversole, Barbara A. W. / <i>Indiana State University, USA</i>	136
Farinha, João / <i>ISLA Santarém, Portugal</i>	187
Figueiredo, Paula Cristina Nunes / <i>Universidade Lusófona, Portugal</i>	243
Gameiro, Marta / <i>ESTG, Polytechnic of Leiria, Portugal</i>	102
Gomes, Daniel Roque / <i>Instituto de Comunicação da NOVA, ESEC, Polytechnic Institute of Coimbra, Portugal</i>	102
Gomes, Patricia / <i>Instituto Superior de Administração e Gestão de Leiria, Portugal</i>	243
Işık, İdil / <i>Istanbul Bilgi University, Turkey</i>	66, 116
İslamoğlu, Güler / <i>Marmara University, Turkey</i>	66
Jeske, Debora / <i>University College Cork, Ireland</i>	403
Leal, Sandrina Encarnação / <i>Instituto Superior Dom Dinis, Portugal</i>	243
Ling, Vivien Lim Siew / <i>Anglia Ruskin University, UK</i>	358
Lopes, Inês / <i>Instituto Politécnico de Leiria, Portugal</i>	243
Mak, Chee Wai / <i>National Institute of Development Administration, Thailand</i>	308
Maritsa, Evangelia / <i>Athens Naval Hospital, Greece & National Centre for Public Administration and Local Government, Greece</i>	208
Martins, Helena / <i>Universidade Lusófona, Portugal & CEOS.PP, ISCAP, Polytechnic of Porto, Porto, Portugal</i>	208
Masenya, Tlou Maggie / <i>Durban University of Technology, South Africa</i>	383
Naidoo, Vannie / <i>University of KwaZulu-Natal, South Africa</i>	287

Navarro, Reuben / <i>University of Malta, Malta</i>	269
Orozco-Quijano, Elsa Patricia / <i>Laurentian University, Canada</i>	426
Özbudak, Esin Çetin / <i>Istanbul Bilgi University, Turkey</i>	116
Pinto-López, Ingrid N. / <i>UPAEP Universidad, Mexico</i>	41
Pruetipibultham, Oranuch / <i>National Institute of Development Administration, Thailand</i>	308
Przytula, Sylwia / <i>Wrocław University of Science and Technology, Poland</i>	269
Ribeiro, Neuza / <i>Centre of Applied Research in Management and Economics, ESTG, Polytechnic Institute of Leiria, Portugal</i>	102
Rodrigues, Elisabeth / <i>Universidade Lusófona, Portugal</i>	208
Singh, Anurag / <i>University of Petroleum and Energy Studies, India</i>	89
Skonieczny, Jan / <i>Wrocław University of Science and Technology, Poland</i>	23
Tan, Başak Uçanok / <i>Istanbul Bilgi University, Turkey</i>	66
Tomas, Cynthia Maria Montaudon / <i>UPAEP Universidad, Mexico</i>	41
Tracz-Krupa, Katarzyna / <i>Wrocław University of Economics and Business, Poland</i>	269
Vargas-Hernández, José G. / <i>Tecnológico Mario Molina Unidad Zapopan, Mexico</i>	426
Yücel, Betül / <i>IF Consultancy, Turkey</i>	66, 116
Zachariah, Minu / <i>B.M.S. College of Engineering, India</i>	1

Table of Contents

Foreword	xxi
Preface: COVID-19 – A New Setting	xxii
Chapter 1	
Future of Work Places: A Hybrid Approach.....	1
<i>Minu Zachariah, B.M.S. College of Engineering, India</i>	
<i>Neetha Mary Avanes, Christ University, India</i>	
<i>Satya Nandini Arjunan, B.M.S. College of Engineering, India</i>	
Chapter 2	
Strategic Responses of the Organization to the COVID-19 Pandemic Crisis	23
<i>Aldona Malgorzata Deren, Wroclaw University of Science and Technology, Poland</i>	
<i>Jan Skonieczny, Wroclaw University of Science and Technology, Poland</i>	
Chapter 3	
Dealing With Pandemic Grief in Organizations: A Human Resources (HR) Challenge.....	41
<i>Cynthia Maria Montaudon Tomas, UPAEP Universidad, Mexico</i>	
<i>Anna Amsler, Independent Researcher, Mexico</i>	
<i>Ingrid N. Pinto-López, UPAEP Universidad, Mexico</i>	
Chapter 4	
An Ecosystem Approach to Human Resource Management: Dialogues in a COVID-19 Context.....	66
<i>Şafak Öz Aktepe, Istanbul Bilgi University, Turkey</i>	
<i>Başak Uçanok Tan, Istanbul Bilgi University, Turkey</i>	
<i>İdil Işık, Istanbul Bilgi University, Turkey</i>	
<i>Güler İslamoğlu, Marmara University, Turkey</i>	
<i>Melek Birsal, Marmara University, Turkey</i>	
<i>Betül Yücel, IF Consultancy, Turkey</i>	
Chapter 5	
From Crisis to Resilience: A Human Resource Management Perspective in the Pandemic	89
<i>Anurag Singh, University of Petroleum and Energy Studies, India</i>	

Chapter 6

Recruitment During a Pandemic: New Ways of Facing the Job Market? 102

Marta Gameiro, ESTG, Polytechnic of Leiria, Portugal

*Neuza Ribeiro, Centre of Applied Research in Management and Economics, ESTG,
Polytechnic Institute of Leiria, Portugal*

*Daniel Roque Gomes, Instituto de Comunicação da NOVA, ESEC, Polytechnic Institute of
Coimbra, Portugal*

Chapter 7

Human Resources Management's Predominant Role in the COVID-19 Crisis: Making a
Difference via Flexi-Time and Flexi-Space Working Solutions 116

İdil Işık, Istanbul Bilgi University, Turkey

Betül Yücel, IF Consultancy, Turkey

Esin Çetin Özbudak, Istanbul Bilgi University, Turkey

Chapter 8

Work/Family Interventions and COVID-19 Pandemic Remote Work Arrangements 136

Barbara A. W. Eversole, Indiana State University, USA

Cindy L. Crowder, Indiana State University, USA

Chapter 9

Virtual Management During COVID-19: The Need for Context and Competence Development for
Virtual Managers Because of the Pandemic 163

Svein Bergum, Inland Norway University of Applied Sciences, Norway

Chapter 10

Telework as an Element That Leverages Professional Performance and Family Balance..... 187

João Farinha, ISLA Santarém, Portugal

Loide Raquel Ascenso, ISLA Santarém, Portugal

Chapter 11

Where Are You Going, Work From Anywhere? The Challenges of Remote Work Before and
After the COVID-19 Pandemic..... 208

*Helena Martins, Universidade Lusófona, Portugal & CEOS.PP, ISCAP, Polytechnic of Porto,
Porto, Portugal*

*Evangelia Maritsa, Athens Naval Hospital, Greece & National Centre for Public
Administration and Local Government, Greece*

Elisabeth Rodrigues, Universidade Lusófona, Portugal

Chapter 12

Making Leadership Development Effective: Lessons From COVID-19 Experiences..... 225

Okechukwu Ethelbert Amah, Lagos Business School, Pan Atlantic University, Nigeria

Chapter 13

Transformational and Authentic Leadership in Telework.....	243
<i>Paula Cristina Nunes Figueiredo, Universidade Lusófona, Portugal</i>	
<i>Sandrina Encarnação Leal, Instituto Superior Dom Dinis, Portugal</i>	
<i>Inês Lopes, Instituto Politécnico de Leiria, Portugal</i>	
<i>A. Ferreira Cascão, Instituto Politécnico de Setúbal, Portugal</i>	
<i>Patricia Gomes, Instituto Superior de Administração e Gestão de Leiria, Portugal</i>	

Chapter 14

COVID-19 and Its Impact on the Psychological Contract of Employers and Employees.....	269
<i>Vincent Cassar, University of Malta, Malta</i>	
<i>Neil Conway, Royal Holloway, University of London, UK</i>	
<i>Katarzyna Tracz-Krupa, Wrocław University of Economics and Business, Poland</i>	
<i>Sylvia Przytula, Wrocław University of Science and Technology, Poland</i>	
<i>Reuben Navarro, University of Malta, Malta</i>	

Chapter 15

The Impact of COVID-19 on the Human Resources Function for SME Owners: A South African Perspective	287
<i>Vannie Naidoo, University of KwaZulu-Natal, South Africa</i>	

Chapter 16

Managing Business Continuity in the COVID-19 Era: Case of a Manufacturing Company in Thailand	308
<i>Chee Wai Mak, National Institute of Development Administration, Thailand</i>	
<i>Oranuch Pruetipibultham, National Institute of Development Administration, Thailand</i>	

Chapter 17

Impact of Organizational Culture on Performance during COVID-19 Pandemic: An Insight From the Malaysian Healthcare Industry	358
<i>Vivien Lim Siew Ling, Anglia Ruskin University, UK</i>	
<i>Omkar Dastane, UCSI Graduate Business School, UCSI University, Malaysia</i>	

Chapter 18

The Role of Human Resource and Knowledge Management in Improving Service Delivery in Knowledge-Based Organizations in South Africa: Best Practices in the Wake of the COVID-19 Era.....	383
<i>Tlou Maggie Masenya, Durban University of Technology, South Africa</i>	

Chapter 19

Cross-Functionality in Practice: Electronic Performance Monitoring.....	403
<i>Debora Jeske, University College Cork, Ireland</i>	
<i>Thomas Stephen Calvard, University of Edinburgh Business School, UK</i>	

Chapter 20

Contextual Transformations: Organisational Sustainability Under Crisis..... 426

José G. Vargas-Hernández, Tecnológico Mario Molina Unidad Zapopan, Mexico

Elsa Patricia Orozco-Quijano, Laurentian University, Canada

Compilation of References 443

About the Contributors 527

Index..... 539

Detailed Table of Contents

Foreword	xxi

Preface: COVID-19 – A New Setting	xxii

Chapter 1

Future of Work Places: A Hybrid Approach	1

Minu Zachariah, B.M.S. College of Engineering, India

Neetha Mary Avanes, Christ University, India

Satya Nandini Arjunan, B.M.S. College of Engineering, India

Hybrids are becoming the order of the day. The word hybrid came into existence to define the offspring of two dissimilar animals. Later, it was used to define plants that picked up the strengths of two varieties and displayed it together. Hybrids were popular in vehicles too. The pandemic that has struck the globe has accentuated the need for a hybrid framework at work. A hybrid work order relates to a flexible system whereby the employees are given the liberty to categorise their workdays between work from home and work from office. It was meant to reinvent traditional workplaces to improve productivity and reduce cost and employee attrition. Most of the organisations do not have the awareness or experience to implement the model. The chapter has examined the development of hybrid workplace models, its role in changing work dynamics, the major issues and challenges relating to its implementation, and a few insights on the best practices in the design and delivery of hybrid models.

Chapter 2

Strategic Responses of the Organization to the COVID-19 Pandemic Crisis	23

Aldona Malgorzata Deren, Wroclaw University of Science and Technology, Poland

Jan Skonieczny, Wroclaw University of Science and Technology, Poland

The purpose of this chapter is to present a model of strategies that, on the one hand, are to prevent the spread of the crisis and, on the other hand, limit its negative effects and prepare the organization for a further escalation of the pandemic as a result of the emergence of new variants of the SARS virus. These activities can help the organization stabilize its functioning, stop the spread of the crisis and limit its negative effects, and prepare the company for a further escalation of the pandemic (long COVID-19). On the basis of literature studies and research reports and actions taken by organizations in the conditions of the crisis caused by COVID-19 were distinguished. These activities were analyzed, which allowed the presentation of a strategy model (resilience strategy, long-term strategy, HR strategy) that can be used within the organization to deal with a pandemic crisis.

Chapter 3

Dealing With Pandemic Grief in Organizations: A Human Resources (HR) Challenge..... 41

Cynthia Maria Montaudon Tomas, UPAEP Universidad, Mexico

Anna Amsler, Independent Researcher, Mexico

Ingrid N. Pinto-López, UPAEP Universidad, Mexico

This chapter analyzes grief in organizations as a result of the COVID-19 pandemic and how it has become a challenge that human resources professionals need to include in their future strategies. The chapter provides a literature review surrounding the concepts of grief and loss, especially pandemic-related grief and grief in the workplace. Additionally, it includes the most relevant scales used to evaluate grief and bereavement related to different types of loss. Best practices are included to present a general overview of how grief and loss can be dealt with in a way in which the positive emotions can be used to outcast lasting negative emotions. A modified version of the pandemic grief scale was applied in a private business school in Mexico to analyze the impact of grief in the workplace during the health crisis.

Chapter 4

An Ecosystem Approach to Human Resource Management: Dialogues in a COVID-19 Context..... 66

Şafak Öz Aktepe, Istanbul Bilgi University, Turkey

Başak Uçanok Tan, Istanbul Bilgi University, Turkey

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Amid the COVID-19 pandemic, both practitioners and academics faced surmountable issues that created a massive toll on both organizations and employees. The new complexities surrounding organizations call for novel approaches in understanding the future of work and its components. HR carries a critical strategic function for organizations to adapt to the various complexities and develop strategies that enable them to manage people when uncertainty prevails. The “ecosystem” emerged as a concept that drove theoretical and HR strategy discussions in the last two decades. Its advancement reflects a growing interest regarding the interdependence in elements, structures, and actors across organizations and activities. The COVID-19 pandemic highlights the critical importance of interconnectedness for surviving in today’s highly volatile environment. Thus, this work proposes a preliminary theoretical model of the HR ecosystem in the COVID-19 context using the arguments of systems and complexity theories and the current HR literature.

Chapter 5

From Crisis to Resilience: A Human Resource Management Perspective in the Pandemic 89

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Today’s companies must be vigilant and flexible in the face of unanticipated occurrences, such as external crises, that heighten employee uncertainty and represent direct challenges to the organization’s performance and sustainability. However, as a result of the current COVID-19 pandemic, companies are suddenly forced to traverse the unexpected and hence develop novel solutions to issues occurring across a wide range of operational domains. Several of these concerns are addressed in this chapter, with a particular emphasis on the transformation of human resource management (HRM) during COVID-19, as government and firms help their workers in adjusting to their significantly altered work environment.

Chapter 6

Recruitment During a Pandemic: New Ways of Facing the Job Market?	102

Marta Gameiro, ESTG, Polytechnic of Leiria, Portugal

*Neuza Ribeiro, Centre of Applied Research in Management and Economics, ESTG,
Polytechnic Institute of Leiria, Portugal*

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This study aims to analyse the impact of COVID-19 on the recruitment processes, more specifically, to understand the types and forms of recruitment practiced by companies, how they were affected by COVID-19, and what procedures were adopted during the pandemic. It also aims to identify the most valued soft skills and the future perspective in terms of recruitment in a post-pandemic period. The study was carried out using a qualitative methodology based on seven structured interviews with HR managers from Portuguese companies. The analysis of the interviews concluded that external recruitment is the most identified option in both periods before the pandemic and during. External recruitment favours social and professional networks, especially Facebook and LinkedIn. Respondents assumed that, in both phases, the use of job search websites is the most successful external recruitment technique. In relation to soft skills, with the pandemic, companies began to particularly value flexibility and resilience.

Chapter 7

Human Resources Management's Predominant Role in the COVID-19 Crisis: Making a Difference via Flexi-Time and Flexi-Space Working Solutions	116

İdil Işık, Istanbul Bilgi University, Turkey

Betül Yücel, IF Consultancy, Turkey

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The COVID-19 pandemic changed existing and future work settings by putting flexible working options on the business agenda. The transition to flexible working has been a painful process for some organizations while integrating it into daily work practices has been relatively straightforward for others. This chapter will display data from a project carried out in Turkey during the lockdown period. The qualitative phase highlights the crucial role of human resources management in sustaining the employees and organizations under the conditions of pandemics. In this regard, the chapter will elaborate how human resources management functions adapted for a smooth transition to flexi-time-space models based on the experiences of 27 local and global organizations in Turkey. Digitalization and transformation of human resources functions, employee engagement and internal communication, performance management and employee-manager interrelations emerged as the master themes to scrutinize the ground-breaking shift to the alternative ways of working triggered by COVID-19.

Chapter 8

Work/Family Interventions and COVID-19 Pandemic Remote Work Arrangements	136

Barbara A. W. Eversole, Indiana State University, USA

Cindy L. Crowder, Indiana State University, USA

This chapter discusses work/family interconnections, theory, and the interventions that organizations have put into place to help employees manage their work/non-work boundary, such as flexible work options. The advent of the COVID-19 pandemic has led to the utilization of a specific type of flexible work option, working from home, or remote working. This chapter discusses the benefits of remote

working for employees and organizations, the challenges of remote working, and the ways to make remote working be successful in organizations. Finally, the chapter looks at remote working globally and what the future of remote working may look like.

Chapter 9

Virtual Management During COVID-19: The Need for Context and Competence Development for Virtual Managers Because of the Pandemic 163

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Before the pandemic, research on management at a distance, here called virtual management, was characterized by a “best practice approach” where there was little differentiation dependent on context. COVID-19 has meant that employees with insufficient competence and in unsuitable jobs must work remotely. A more context- or situation-oriented perspective on virtual management is therefore needed. The authors identify new characteristics of virtual management during the pandemic and identify relevant context factors. Another point marginally discussed in previous research is what kind of competence-developments leaders need post COVID-19. The research questions are answered through a qualitative study with semi-structured interviews of experts, such as consultants in new ways of working, together with interviews of experienced practitioners.

Chapter 10

Telework as an Element That Leverages Professional Performance and Family Balance..... 187

João Farinha, ISLA Santarém, Portugal

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The aim of this chapter is to investigate how employees view telework as a tool for improving professional performance and family balance. According to the findings, teleworking and family balance improve professional success. “Is telework an aspect that leverages professional success and family balance?” was the research question. It was feasible to test and verify the effects of perceived teleworking on professional performance and family balance through teams and organizations. This conceptual study covers fundamentals of teleworking, the benefits and drawbacks, as well as the impact on professional performance and family balance. The literature review entails a thorough examination of papers from major scientific databases (e.g., Scopus, WoS). Quantitative methods are applied in the field approach (2020-2021). A survey was created and distributed through social media platforms to collect data (e.g., Facebook, LinkedIn). The findings show a favourable association between the variables studied, as well as a good employee opinion of the impact of increased autonomy on telework performance.

Chapter 11

Where Are You Going, Work From Anywhere? The Challenges of Remote Work Before and After the COVID-19 Pandemic..... 208

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The onset of the virtual revolution and global working trend known as working from anywhere (WFA) potentiated by the bio event COVID-19 shifted not only the way we work but also the focus of research on

this topic. This chapter aims to portray in a systemic way the researchers conducted before and after the bio event in a systematic way in order to create a research map of topics by having as reference point the outbreak of the pandemic and by using VOS Viewer software to illustrate the resulting clusters of topics around this reference point topics before and after the pandemic hit. Results indicate a clear difference between the two periods regarding the WFA research. Firstly, the number of papers published on this topic has increased significantly, and secondly, the types of topics approached seem to have become more focused. Main topics of research are discussed as a way to reflect on the challenges for theory and practice that are to come.

Chapter 12

Making Leadership Development Effective: Lessons From COVID-19 Experiences..... 225
Okechukwu Ethelbert Amah, Lagos Business School, Pan Atlantic University, Nigeria

The exploratory chapter discussed an important gap in the development of leaders. It identified the understanding of leadership and leadership mindset as hidden drivers of leadership behaviors rarely included in leadership development. The review identified four categories of leadership mindset that have varying effects on behavior: fixed/internal, fixed/external, growth/internal, and growth/external. The best mindset that drives positive leadership behaviors that lead to the creation of a positive work climate is the growth/external mindset. The chapter reviewed the role of values, understanding of human nature, the dignity of the human person, emotional intelligence, and leaders' core self-evaluation in the formation of the growth/external mindset. A future recommendation is the development of a scale for the mindsets and an empirical study aimed at establishing the differential effects of the mindsets on leadership behavior.

Chapter 13

Transformational and Authentic Leadership in Telework..... 243
Paula Cristina Nunes Figueiredo, Universidade Lusófona, Portugal
Sandrina Encarnação Leal, Instituto Superior Dom Dinis, Portugal
Inês Lopes, Instituto Politécnico de Leiria, Portugal
A. Ferreira Cascão, Instituto Politécnico de Setúbal, Portugal
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The COVID-19 era has driven virtual work models in the organisational context. Teleworking was the alternative that many organisations found to continue operating. Overnight, many employees started working from home. Leadership practices are essential in times of uncertainty and crisis. This study aims to analyse the perception of teleworking employees regarding the leadership style, specifically the transformational and authentic leaderships. The results show that transformational leadership is predominant in the teleworking context. However, when compared with other studies, teleworking employees perceive less transformational leadership behaviours and more behaviours referring to laissez-faire leadership, as well as the behaviours of transactional leadership. Teleworking employees perceive more behaviours of the authentic leadership style. This study demonstrates the need for leaders to adapt their behaviours to the new working conditions, face-to-face and virtual, to ensure leadership effectiveness.

Chapter 14

COVID-19 and Its Impact on the Psychological Contract of Employers and Employees 269

Vincent Cassar, University of Malta, Malta

Neil Conway, Royal Holloway, University of London, UK

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COVID-19 has disturbed employment relationships. Twenty employers and 20 employees were interviewed to gain early insights into how the pandemic affected their psychological contract. Results suggested that both parties had divergent expectations of what each party should expect in the current scenario, and both reported intense, often negative, emotions about their current state. While no specific breaches of explicit promises were reported, employees reported violation of implicit beliefs relating to their needs for security. In addition, both parties' expectations differed about their future PC. Employees expected a deal that considers needs for security whereas employers emphasized business continuity by minimizing costs. Such incongruent current and future obligations between the parties suggest trust will be required to negotiate the employment relationship through the crisis. HRM practitioners will have a definite role to play by providing and initiating arrangements that will reconcile both parties' needs to ensure stable employment relationships for mutual benefits.

Chapter 15

The Impact of COVID-19 on the Human Resources Function for SME Owners: A South African Perspective 287

Vannie Naidoo, University of KwaZulu-Natal, South Africa

ICT in SME development, especially in the human resource function, is crucial to business growth and sustainability. During COVID-19, SMEs had to very quickly migrate to more digital platforms. COVID-19 affected the business arena world-wide, small businesses included. SMEs were very hard hit by COVID-19 because of the harsh lockdowns and shut downs by governments during the pandemic. Not all businesses in South Africa were allowed to operate during some of the Levels 5 and 4 and even 3 lockdowns. As more information was being filtered during 2020 by the World Health Organization, who provided direction on the pandemic, decisions were made by governments accordingly to keep their citizens safe and at home during the lockdowns so that the over-burdened medical sectors would not collapse. This chapter explores ICTs in SMEs, ICTs utilized in SME HR function, how ICTs impacted organizations during COVID-19, and how SMEs adopted to digitization and online-training to survive in a disruptive environment like the pandemic.

Chapter 16

Managing Business Continuity in the COVID-19 Era: Case of a Manufacturing Company in Thailand 308

Chee Wai Mak, National Institute of Development Administration, Thailand

Oranuch Pruetipibultham, National Institute of Development Administration, Thailand

Almost two years since the first reported confirmed case, the novel coronavirus disease 2019 (COVID-19) continues to impact people around the world. While some companies could adopt a work from home strategy to cope, manufacturing companies did not have such a choice. Subject to government regulations and possible closures to curb the spread of COVID-19, manufacturing companies need to find ways to

mitigate risks and continue operating. This chapter shares the case study of how a framework (COVID-19PAL) helped a multi-national manufacturing company of 29,000 employees situated in Thailand deal with a high number of infections and continue to operate safely. The COVID-19PAL framework draws from different disciplines (such as epidemiology, physics, mathematical modeling, sociology, and social psychology) and provides necessary information for human resource professionals to be effective in dealing with a pandemic. This chapter thus fills an existing gap in literature, assisting human resource professionals, organization leaders, and employees to understand what the situation meant.

Chapter 17

Impact of Organizational Culture on Performance during COVID-19 Pandemic: An Insight From the Malaysian Healthcare Industry 358

Vivien Lim Siew Ling, Anglia Ruskin University, UK

Omkar Dastane, UCSI Graduate Business School, UCSI University, Malaysia

This research-based chapter investigates the impact of organizational culture on organizational performance in the context of Malaysian healthcare industry during the COVID 19 pandemic. The study developed a framework based on Daniel Denison's organizational culture model with organizational culture as second order construct comprised of factors namely adaptability, involvement, consistency, and mission. The data was collected from 202 healthcare professionals working in hospitals in Malaysia. Data collection was conducted using self-administered online questionnaire measuring items on Likert scale of 1-7. The data were purified and assessed for its reliability and normality using SPSS 22. This then was followed by confirmatory factor analysis, validity assessment and structural equation modelling using AMOS 24 software. The results of the research exhibited that the proposed model has appropriate fit and organizational culture has a direct strong positive impact on organizational performance.

Chapter 18

The Role of Human Resource and Knowledge Management in Improving Service Delivery in Knowledge-Based Organizations in South Africa: Best Practices in the Wake of the COVID-19 Era 383

Tlou Maggie Masenya, Durban University of Technology, South Africa

The major goal of every organizational strategy is to enhance the effectiveness and efficiency of operation which could lead to organizational performance and success. However, the emergence of the COVID-19 pandemic has caused an abrupt change to the way most knowledge-based organizations work. For many knowledge-based organizations, periods of rapid technological changes and pandemic era are also periods of incessant struggle to maintain a high-performance work environment. These organisations are now beginning to consider the longer-term impact of COVID-19 including some potentially positive changes to the way that they work. Employees within these organizations were forced to work remotely for the first time during lockdown and had to adjust to working from home almost overnight while others were unable to work at all. The aim of this chapter was to determine the role of human resource management and knowledge management in improving service delivery within knowledge-based organizations.

Chapter 19

Cross-Functionality in Practice: Electronic Performance Monitoring..... 403

Debora Jeske, University College Cork, Ireland

Thomas Stephen Calvard, University of Edinburgh Business School, UK

Cross-functional integration is a topic of discussion in many different disciplines. Electronic performance monitoring (EPM) is the practice of managing employee performance digitally. It is also a key example of cross-functionality. The authors reflected on organizational practice and existing literature to demonstrate the interconnections between different functions supporting EPM. A range of professions and functions play important cross-functional roles in the design, use, and implementation of EPM systems in organizations, such as IT and security, legal and data protection, and health and safety, among others. Barriers to cross-functional integration involving HR and EPM are identified, and recommendations are offered on how to overcome such barriers in practice. The practice and design of EPM serves as a powerful example for raising more explicit awareness and understanding of the opportunities and challenges affecting how HR integrates and works with a variety of other interdependent functional and professional groups and roles.

Chapter 20

Contextual Transformations: Organisational Sustainability Under Crisis..... 426

José G. Vargas-Hernández, Tecnológico Mario Molina Unidad Zapopan, Mexico

Elsa Patricia Orozco-Quijano, Laurentian University, Canada

This study analyzes the various features and elements related to strategic organizational sustainability. The analysis departs from the assumption that traditional organizations have to face a lot of challenges posed by the new global economy context confronting contradictory patterns of globalization and des-globalization processes. In order to create the new conditions for the organizations not only to survive but to succeed, a new model based on designing and implementing strategic organizational sustainability, abandoning the narrow focus on economic growth and profits to embrace the social inclusion and equity as well as the environmental sustainability issues, is.

Compilation of References 443

About the Contributors 527

Index..... 539

Foreword

The book *Handbook of Research on Challenges for Human Resource Management in the COVID-19 Era* is a significant contribution to the body of knowledge on people management issues during a time of extreme complexity that affected organizational development while coping with unanticipated effects.

The book addresses many strategies for performance of remote workers, leadership, and the introduction of new models of management and technologies in the workplace, as well as new forms of work organization and development. It also covers issues like the effects of digital technology on human resource management, which are covered in a number of global research studies. It discusses the novelty caused by the complexity of the external environment, and the needs for the reorganization and change of the organizational systems, policies, processes, and practices, as well as workers behaviors.

The research discussed in the book has the potential to increase critical thinking and understanding in universities, workplaces, and throughout society. The objective is to encourage organizations to innovate more and to be more resilient and capable of responding to both internal and external challenges and obstacles. Human Resources Managers and Leaders must choose the best approach for their strategies and business processes based on the complexity of the context because every organization is unique. This book addresses increasing the risks of HR practices related to new and emerging technologies in a context characterized by unexpected variables.

This book can foster knowledge for the implementation of more flexible human resources management practices, it can enable arenas of discussion to build more prepared organizations that can help the workers to face conjunctural and structural changes.

It gives highlights to the Human Resources Managers to promote organizational management structures with more capacity to be sustainable in responding to complex situations of public health. The book contributes for the implementation and to foster knowledge about the following United Nations Sustainable Development Goals: (8) Decent Work and Economic Growth; (9) Industry, Innovation, and Infrastructure; and (10) Reduced Inequality guided by the principles of human rights at work.

This book is an essential title for leaders and Human Resources Managers, but also for students and faculty of higher education, and researchers of all scientific fields.

Sincerely

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Preface: COVID-19 – A New Setting

From the start Covid-19 looked like a war and even a World War. The similarities between the two World Wars and COVID-19 crisis are shown in the following Table 1 (Tomé et al., 2022, adapted):

Table 1. World War I, World War II, and COVID-19 compared –Similarities

	World War I	World War II	COVID-19
Period	1914-18	1939-45	2019-?
Duration	4 years, 3 months and 2 weeks	6 years and 1 day	On going
Conflict	Allies vs Germany	Allies vs Axe	Mankind vs Virus
Deaths	18 million	73 million	6,300,000 and counting (Worldmeters, 2021)
Economic Damage	Massive stoppage solved by Versailles Treaty	Massive stoppage solved by Marshall Plan plus USSR actions	Great Confinement, biggest recession since 1929, solved by massive financial packages for economic recovery: €800 billion in the EU for the period 2021-6 and 2 trillion for infrastructures in the U.S.
Infrastructures	Destroyed	Annihilated	Paralyzed
Olympic Games	1916 not held	1940 and 1944 not held	2020 postponed and held in 2021

Source: Own work

However, we believe that the COVID-19 crisis is also very different from WW-I and WW-II. The differences between the two phenomena are shown in Table 2 (Tomé et al., 2022, adapted):

Table 2. World War I, World War II, and COVID-19 compared – Differences

	World War I	World War II	COVID-19
Major Leaders	Kaiser Wilhelm II and George V	Hitler and Churchill	Emmanuel Macron, Jacinda Ardern, Donald Trump, Joe Biden, Vladimir Putin, António Guterres
Problem	Military	Military	Health care with major ramifications
Situation Regarding Trust	Mistrust between two blocks	Mistrust between two blocks	Global mistrust caused by a new and highly contagious, often asymptomatic virus & misinformation
Technology	Phone and Radio	Radio and Film Newsreels	Internet & Media
Economic Era	Second Industrial Revolution; first part Agriculture based, Land driven	Second Industrial Revolution; second part Industry based, Human resource based	Fourth Industrial Revolution; Service based, Knowledge driven
Human Resources Level	Literacy	Primary or low secondary	University
Speed of Communications	Slow	Fast	Instantaneous
Weapons	Guns	Guns and Bombs	Vaccine, social distancing
End	Peace	Peace	Safety

Source: Own Work

Tomé et al. (2020) summarized the situation regarding COVID-19 using Table 3.

Table 3. The old normal and the new normal

	Pre-COVID-19	COVID-19 Crisis
Rule	Freedom	Confinement
Security	Medium high	Low
General Feeling	Trust	Fear
Requirement	Proximity	Social distance
Freedom of Movement	Very large	Very limited
Security Concerns	Linked to crime and terrorism	Linked to virus
Meetings	Allowed and even encouraged	Restrained if not prohibited
Masks	For Carnival	For normal life
On-Line Work	Residual	Norm
Office Work	Norm	Residual
Face-to-Face Meetings	Frequent	Rare
Number of People in Meetings	Hundreds of thousands if not millions	Ten
Borders	Open, limited by visas and security control	Closed, with exceptional possibilities of travel
Professional Sport	Permanent	Rare

Source: Own work

COVID-19 AND HUMAN RESOURCE MANAGEMENT

The new normal will separate the wheat from the chaff (Tomé & Gromova, 2021). Digital solutions will be used where and when they do bring benefits; digitalization was a trend before the pandemic, which is going to be reinforced; but COVID-19 also showed the limits of the digital processes – it is as if digitalization was implemented as an experiment in the most drastic circumstances (Tomé & Gromova, 2021). A divide will occur (Tomé & Gromova, 2021):

- Digital will be increasingly used when solutions may be massified and / or lack differentiation.
- Face-to-face communication will be increasingly used when solutions are unique and need differentiation.

As Plato and Aristoteles in the famous painting of Raphael, we still need to meet our students and our peers and to rub shoulders and to walk with them; this activity is essential to maintain a sustained level of academic output – and namely related to classes or research; in the Renaissance our ancestors made traveling become norm in order to foster progress – we are bound to follow their example, and this will be a major conditioning to the “new normal” in Academia and organizations (Tomé & Gromova, 2021).

Within this context, we assume that HRM will have to be adjusted in the Covid-19 times, and as long the effects of the pandemic continues. That adjustment means several things, namely (Tomé and Gromova, 2021, adapted):

- a) Organizations have to become agile,
- b) Organizations must get ready for dynamic collaboration to ensure that demands from the public (students or other stakeholders) are processed quickly and efficiently; this requires for each case a specific combination of core competencies of partner individuals, groups or universities, forming a uniquely agile university;
- c) Syllabus, programs, teaching methods, evaluation have to change, and there is no road map – because the situation is entirely new
- d) HRM and Human Resource Development (HRD) will have to be changed and the solution will not be to acquire knowledge or information.
- e) Moreover, the solution for the problem of organizations during COVID-19 and in the aftermath, will have to be found using both Knowledge Exploration and Knowledge Sharing, because they deal with the two most important problems of the crisis, namely unconscious incompetence linked with unknown unknowns and lack of data, and un-conscious competence linked to unknown knowns and lack of wisdom.
- f) This means that we do not know what we do not know regarding how to manage business education with and after COVID-19 and we will have to search for the answer as it we would be exploring a dense forest; but rather amazingly some of the best answers may be found in the Unknowns knowns territory and in the possibility of use wisdom and intuition to solve this very complicated problem. Most importantly the solution is not unique and it is mixed.

An Anxious World

When in 2020 COVID-19 became a global phenomena, the workplace changed. Human Resource Management changed accordingly. The idea behind this Book was to try to understand that change. We therefore believe this book may be of interest to practitioners and scholars who have to deal and study Human Resources.

The papers listed in this book address the change that happened in HR with COVID-19 in several ways:

1. Analyzing the organizations during COVID-10 namely on authentic leadership, effective leadership, recruitment, psychological contract, competence management, and work life balance
2. Exploring the new questions that arose with COVID-19 namely electronic performance monitoring, work remote arrangements, flexi-time and flexi-space working arrangements
3. Dealing with deeper questions that were also put forward by COVID-19 like grief and harmony
4. Studying the transformation of organizations taken into a broad sense, namely on strategy, organizational sustainability, resilience, remote work, and hybrid work
5. Presenting sector based studies, namely on manufacturing, healthcare, knowledge-based service companies, and the SMEs

ORGANIZATION OF THE BOOK

The book is organized in 20 chapters. Here is a brief description of the main ideas of each chapter:

In Chapter 1, Zachariah, Avanesh, and Nandin consider that Hybrid workplaces were created to accommodate all the employees in the organisation who are either interested in working from home/ remotely or from office; these new workplaces are meant to give employees the freedom to work from anywhere, enabling them to balance their work-life without compromising on efficiency; this very important because organisations that have adopted this model are likely to reap benefits in future though they have to face certain challenges, as it outweighs the potential negatives; namely they have to invent and reinvent policies, structures, procedures and processes suitable enough to engage the workforce for an ideal result, needed to thrive in the new normal.

In Chapter 2, Deren and Skonieczny recommend a duration strategy, to face up to new variant of the virus, which includes a set of activities building various scenarios of future events in order to search for ways to adapt to them in the event of new crises. Until now, there were no such requirements in the management of organizations, but the pandemic and its nature make people think and implement new approaches in the daily functioning of the organization. Crucially, organizations must take measures to survive and be resilient organizations and apply (more than before Covid-19 and its variants) scenario-building methods for strategic environmental analysis.

In Chapter 3, Montaudon-Tomas, Amsler, and Pinto-López use a short scale to measure the amount of grief in a private business school in Mexico and how it has affected people's perception of their job and the workplace in general. Even if the grieving processes can vary from person to person, due to the pandemic, grief has become a constant, creating conditions that affect how members perceive different aspects of their lives, including work. Sometimes, grief reactions are disenfranchised because people are not allowed to publicly show grief or feel like it is inappropriate and therefore grieve alone. It is important to make employees feel validated in their feelings and develop policies that help build bet-

ter work environments that allow dealing with grief in various ways. More than ever, it is essential for organizations to recognize the importance of managing grief adequately.

In Chapter 4, Aktepe, Tan, Işık, İslamoğlu, Birsel, and Yüce consider that, to ensure successful adaptation, human resources management needs to develop divergence between various employment groups and convergence in managing them simultaneously, which requires a differentiated compatible, and complementary workforce. Therefore, human resources management should create harmony between employees who have different motives and demands while being flexible enough to keep their competitive position, which requires work redesign and training and development programs for continuous learning. In this respect, the functions of HR should be re-crafted for the emergent workplace and the new dynamics that play a role in the HR ecosystem. Thereby, organizations can combat the abrupt changes in working conditions arising from changing technology. Furthermore, technological shifts coupled with the COVID-19 pandemic have increased the system's complexity and call for agility and courage to achieve strategic objectives.

In Chapter 5, Singh notes that businesses clearly understand now the importance of having engaged employees. As a matter of fact, in a pandemic, companies should aim to keep their employees happy and engaged by involving them in their work. Therefore, establishing employee engagement measures using technology is essential for the growth of organizations now. Engaged employees are always able to meet their goals quickly and easily. In consequence, it is essential for organizations to understand the various factors motivating and inspiring employee engagement. With COVID-19, organizations have been experimenting with remote working to reduce the coronavirus curve. To deal with the problem, managers must do everything they can to prevent contamination on surfaces handled by their employees or customers from spreading the COVID-19 virus. Finally, when employees work from home daily, it becomes increasingly challenging for organizations to maintain their mental health and wellbeing. In the face of pandemics and uncertainty, HR managers must examine and adapt their HRM strategies to protect the wellbeing of their staff and, therefore, maximize their productivity. Strategies like digital transformation and employee retention came as a savior for the organization and its people during this challenging pandemic.

In Chapter 6, Gameiro, Ribeiro, and Gomes analyse interviews carried out with seven HR managers from companies belonging to different sectors, and conclude that external recruitment is the most identified option in both phases, both in the period before and during the pandemic. The reason given is that internal recruitment can trigger, in most cases, an external recruitment process, due to the mobilization for another position. Thus, external recruitment has advantages such as: injection of “new blood” into organizations, greater reach, greater success for more specific positions, easy and quick access to social networks, increased age scale within the business, possibility of good external references and use of popular job sites. In consequence, the adoption of virtual channels for selection interviews will continue to be an option for companies. However, companies may also choose to adopt a hybrid model of the recruitment and selection process in the future, balancing face-to-face and remote moments. In this context, after experiencing the pandemic situation, are considering a future based on a hybrid model, between teleworking and face-to-face work, arguing that it is a fairer work model, with full face-to-face work being again an option.

In Chapter 7, Işık, Yucel, and Özbudak conclude that there was an increase in working without borders after the pandemic. In line with the “work from anywhere” style emerging in recent years, which is called digital nomadism in the literature, it eliminates the physical link between home and workplace. Thus, this opportunity to work from anywhere and eliminate international borders means that companies

are moving their current competition to an international platform. In other words, this situation points out that companies should consider the possibility of losing talent in the local market and international markets. Regarding precisely this issue, the participants in this research addressed that the flexible working option is a factor that shapes the perception and identity of the employer in the labour market. This phenomenon, defined under the concept of employer brand in the literature, is related to the effort of being an employer preferred by the candidates in the labour market. Therefore, future research should focus on organizations that can strengthen their employer brands by using flexible working models. Finally, the HR field should consider providing fringe benefits such as meals and transportation and avoid creating an imbalance between employees working remotely or in offices.

In Chapter 8, Eversole and Crowder conclude that digital transformation will improve remote working opportunities in the future.

In Chapter 9, Bergum considers that before the pandemic, previous research on management at a distance, here called virtual management, has been characterized by a “best practice approach”, in which there is little differentiation dependent on context. Significantly, COVID-19 has meant that employees with insufficient competence, and who are in unsuitable jobs, must work remotely. Therefore, a more context- or situation-oriented perspective on distance management is therefore needed, in which factors such as employees’ competence, type of job and extent of home office, as well as employees’ overall. Also it is necessary to know what kind of competence-developments leaders need post-COVID. Results show that due to more employees at remote locations, managers need more competence on digitalization, e.g., related to digital meeting, digital process management, and more trust-based, relationship-oriented and individualized management.

In Chapter 10, by Farinha and Ascenso, the majority of respondents prefer the telework methods, citing increased professional income and family balance as reasons. Another intriguing point is that the responders that favour this work technique the most are from the operations and logistics department. It seems therefore safe to conclude that this organizational change benefits the company as well as its existing and future employees. This will undoubtedly be mirrored throughout the group’s activities, resulting in increased overall productivity and greater earnings by the end of the year. Teams that are happy produce more and better results. By removing the geographical constraint, it is possible to hire the best candidates and get better results. Also, the money saved by not investing in new infrastructure can be used to give the purchasing department more power and to expand the stores and daily operations in order to better service to the final customer and, as a result, retain and grow sales and gross margins.

In Chapter 11, Martins, Maritsa, and Rodrigues analyse Work From Anywhere (WFA). After the pandemic and because lockdowns made WFA mandatory for most people, the research focused first on the impact of the COVID19 on people, including at their workplace. Traditionally, WFA had been seen as a win-win scenario for employees and employers, making it possible for workers to choose from different talents, work hours and rhythms, to reduce real estate (including office and home rents) and travel costs, to motivate employees and to help workers with work-life balance challenges. COVID19 highlighted other difficulties and relevant aspects that are indissociable of traditional work. In fact, people like to socialize and the workplace is a prime opportunity to do so, as personal communication has been shown to be more persuasive and allows a better observing of “social elements” of human interactions; this socialization process leads to team and trust building among colleagues, organizational culture identification and acculturation, etc. This is important because, in general, people prefer to collaborate with others they already also see in person, raising the value of developing real-world contacts, since digital collaborations with people you already know and like or trust are then much more likely.

Thus, the question remains on how if at all companies will adopt WFA after the end of the pandemic considering all the benefits, this may bring to employees, organizations and the society, given the need to address the challenges associated with employees' physical absence (e.g. less spontaneity, less strong interpersonal relationships, etc.).

In Chapter 12, Amah considers that for leaders to develop the leadership styles that drive superior performance, they must have the growth/external mindset; crucially, leadership mindsets are not permanent traits but can be developed and changed. Therefore, any leadership development must begin with a proper understanding of the different leadership mindsets and the behaviors they allow. Factors that help develop a positive mindset include values and their alignment with the human nature and dignity of the human person, leaders' emotional intelligence, and core self-evaluation.

In Chapter 13, Figueiredo, Leal, Lopes, and Cascão e Gomes analyse flexible working models as a future trend in an increasingly global and digital world; notoriously, the COVID-19 era has reinforced virtual working environments. The telework has led to major changes, mainly, in the relationships between employees and their bosses and employers. Leaders must adapt and develop specific skills for these working contexts. Crucially, COVID-19 brings great challenges to the leaders of organisations, not only by the need to develop these skills and prepare the organisations, but also by the reformulation of their objectives, adapting them to virtual working environments with greater flexibility. The great challenge for organisations is to reconcile the different working models in a harmonious way. This study contributed to a greater awareness on the part of leaders about the perception of employees who are teleworking, regarding their behaviour and attitudes; this greater awareness will lead to a correct adaptation of leadership styles, whenever team members are in virtual working environments. Maintaining the same leadership style is inappropriate and the risk of the perception of absence of leadership calls into question the effectiveness of the leader and the success of the organization.

In Chapter 14, Cassar, Conway, Tracz-Krupa, Przytula, and Navarro reflect on the fact that Covid-19 changed the working relationship, between employers and employees, and it is important that both parties derive maximum benefits from the experience; doing so will guarantee that the employment relationship will be restored in a way to safeguard both employees and organizations' optimal performance. In this context HRM practitioners have a role to play in this as they can provide support to both parties to ensure that any new norms initiated will be for mutual benefit. Considering how the parties' psychological contract has shifted and recognizing the nature and extent of the rift will be a good starting point to reconcile and bring back a sense of business harmony.

In chapter 15, Naidoo (2022) suggests that managing people within a South African SME, is one of the most difficult and challenging tasks conducted day to day by the business owner. Managing staff and keeping them happy, properly rewarded and skilled is essential for the smooth running of a small business. ICT's and technology can make training and developing staff more easier, however, the cost should not be seen by the SME owner as a disadvantage, in fact in the long-term it should be treated as an investment. With the COVID-19 pandemic, there is no longer much fuss about online training and E-learning by staff, as it was the only way to remain safe during the pandemic that claimed millions of lives world-wide. New HR policies and protocols were also made mandatory for SME's and all businesses in SA, as this was the only way the SA government saw fit to safeguard its' workforce and the general public. To survive and keep a healthy workforce and a healthy customer base, required safety protocols being put in place for all businesses in SA. To sustain SME's and keep them in business, SME owners had to abide by the law and the new COVID-19 regulations for business. The people of SA, also had a

duty and responsibility to wear their masks, practice social distancing and sanitizing their hands, when shopping or conducting any business transactions.

In Chapter 16, Mak and Pruetipibultham showcased how theoretical concepts in a multitude of disciplines, from Epidemiology (that is, reproduction number), Physics (that is, Wells-Riley model), Statistics and Modeling (that is, Gaussian approximation), to Sociology and Social Psychology (that is, social network analysis, social identity approach and adult attachment style) are combined into practical crisis management deployed at a multinational manufacturing company situation in Thailand. In applying the relevant literature in the ways discussed, the authors have provided insight into how the three questions are answered. Specifically, the protocols and processes, analytics, and communication elements of COVID-19PAL kept the business operational throughout the COVID-19 ordeal. Although more than 10% of employees tested positive for COVID-19 and many others were quarantined, the actions prevented further spread of COVID-19 and operations continued to run without disruption from government closures. The third question is thus addressed. Analytics deployed assisted the crisis management team to understand the likelihood of transmission within the premises while protocols discussed brought the risk of transmission to zero within the premises. The first and second questions are thus addressed.

In Chapter 17, Ling and Dastane conclude that organizational culture has a strong positive impact on organizational performance when investigated in the context of Malaysian healthcare industry during COVID 19 pandemic period. The construct of organizational culture investigated in this context comprised of four factors namely adaptability, involvement, mission and consistency. Therefore, in order to enhance organizational performance, developing stronger organizational culture is of utmost importance. This shows that irrespective of COVID-19 context, the influence of culture on the performance remains significant and positive. However, the findings can vary in terms of its magnitude

In Chapter 18, Masenya states that knowledge-based organizations can enhance or improve their performance by adopting effective performance management techniques and ensuring that employees have the capacity to derive goals from the mission statement and use accountability, performance standards and measures to enhance both organizational and employee performance. Targets setting and benchmark competition can also be used as they have a positive impact on outcomes and will improve the effectiveness of their services. Knowledge-based organizations can therefore improve service delivery by focusing on goals, objectives and targets, mobilizing employee capacity and potentials, ensuring high quality standards, accountability for achieving objectives, ensuring employee training and development.

In Chapter 19, Jeske and Calvard show how cross-functionality is exhibited in Electronic Performance Measurement (EPM) as an HR-led and IT-enabled practice. During the Covid-19 pandemic in 2020 to 2022, the rapid pace of organizational change has also challenged the ability and capacity of HR practitioners to align existing HR practices (e.g., in terms of remote working, work design, health and safety, reward and performance management). All these developments highlight the important need for HR to become more cross-functional in order to keep pace with developments and new demands on the profession and function

Finally, in Chapter 20, according to Vargas-Hernández and Orozco-Quijano, the development of a sustainable organizational vision and mission to solve the crisis is facilitated by the incorporation of a sustainable agenda within the core values of the organization. Shaping the organizational sustainability in alignment with the vision and values of the organization requires the assessment of the stakeholder's impact on local communities and the consideration of issues around cultural diversity, intercultural dialogue, and organizational climate to improve the overall performance. Sustainable organizational development implements innovation knowledge and processes in human resource management and

development practices and aims to develop infrastructure and increase knowledge and innovation. Furthermore, the individual and organizational adaptability to environmental change relies on their ability to develop organizational leadership and managerial effectiveness through adaptive processes in continuous developing stages. They must gather information, diagnose, and design interventions and implement new practices. Organizational leadership must be aligned with sustainable initiatives, lead the example for other organizations and maintain close contact with external environmental communities. They should also volunteer with non-profit organizations and offer organizational and supervisory support. Organizational management is responsible for the motivation and communication between the individuals of the organization and establishes what is expected from them within their workforce; how they can improve the functions of the organization and encompass their community. Organizational development supports regenerative and collaborative working processes to develop embedded organizational roles, practices, and tasks within organizations. Creating collaborative and regenerative work allows for individual and organizational development to be incorporated in post-bureaucratic working practices and contribute to organizational structures, behaviours, and technological processes, over an extended period. Finally, to develop and transform organizational strategies, sustainable organizational practices must consider the needs of current economic, social, and environmental needs as well as those of all future stakeholders involved in sustainable activities.

We deeply thank all the authors of the chapters and hope readers will have a great time reading this book.

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Chapter 1

Future of Work Places: A Hybrid Approach

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ABSTRACT

Hybrids are becoming the order of the day. The word hybrid came into existence to define the offspring of two dissimilar animals. Later, it was used to define plants that picked up the strengths of two varieties and displayed it together. Hybrids were popular in vehicles too. The pandemic that has struck the globe has accentuated the need for a hybrid framework at work. A hybrid work order relates to a flexible system whereby the employees are given the liberty to categorise their workdays between work from home and work from office. It was meant to reinvent traditional workplaces to improve productivity and reduce cost and employee attrition. Most of the organisations do not have the awareness or experience to implement the model. The chapter has examined the development of hybrid workplace models, its role in changing work dynamics, the major issues and challenges relating to its implementation, and a few insights on the best practices in the design and delivery of hybrid models.

INTRODUCTION

The future of work and the workplace is at this intersection of technology, workforce, and workplace.

John Means, Partner, McKinsey

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The COVID-19 pandemic has paved way for a plethora of changes with the global workforce trying to grapple with the new normal. Coping up has been the law of nature and mankind has been inventing and reinventing work practices as they transcend from the 'surviving' to the 'thriving' mode of work. One of the notable changes in the work environment resonates with remote work, wherein work from home (WFH) has become the order of the day across myriad sectors. Nevertheless, even before the influx of the pandemic, companies in the IT sector had adopted and implemented WFH. IBM introduced the concept of WFH on experimental basis involving five employees in 1979, and realized that they were able to minimise cost and grow in the bottom line of business. Since then, they have been continuing with WFH option, and there were other IT companies that followed suit. Few of the companies which had given this option to their employees, had offered it only on a need basis, as they were apprehensive about its effectiveness. However, the COVID-19 crisis forced many organizations to adopt this work model as a means of survival. In many cases, it was found that the employees' engagement levels were high and had resulted in productivity enhancement. The Gallup survey conducted in January 2021 reported that the employees had a mixed opinion about the WFH model. It showed that 39% of the employees who were given this option, wished to return to the workplace, while 44% preferred to work remotely. In response to this, the companies came up with a hybrid workplace model. This chapter focuses on the emergence of the hybrid workplace model, its value to the organisation, preparedness of the Organisations to adopt hybrid workplace and the leadership skills required to take it forward successfully. These focus areas will make companies value the hybrid approach and adopt them to their advantage. This chapter can also be used by the academicians to create awareness about Hybrid Workplace model to the students.

BACKGROUND

Hybrid Workplace: A hybrid workplace is a flexible workplace model that is designed to support a distributed workforce both in-office and employees working remotely. It was allowed in organisations in rare cases before the COVID-19 pandemic, but now companies have decided to introduce this model on a temporary basis and may continue based on its effectiveness.

Hybrid Workplace Models

Hybrid workplace models are mainly classified into three categories based on work environment, scheduling, and division of employees.

Each category can be further differentiated as follows:

1. Work environment: Employees are given the choice to either work remotely or in-office. Arrangements are made accordingly to demonstrate that the employer trusts the employees, which may boost their morale.
 - i. Remote-first / At-will- Employee prefers to work remotely and visits office whenever they need to.
 - ii. Office-first- Employee prefers to work from office and work remotely when required.

Future of Work Places

Pros: The employees can choose the option that best suits them and which helps them to improve their productivity

Cons: When all employees visit the workplace at the same time, this may cause overcrowding and at other times, when limited number of employees visit the workplace, space and resources may be under-utilised or left unutilised. Therefore, it is necessary to have proper mechanisms in place, to avoid chaos.

2. Scheduling: The organisation to schedules the days the teams are assigned to work from office.
 - i. Split-week model: The schedule is provided for each week for each team or department to report to the office. They are required to work on the scheduled days in a week. The employees should report to work accordingly while for the rest of the days they can work remotely.
 - ii. Week-by-week model: The schedule will be prepared in such a way that some teams/departments have to go to office in a particular week. During alternate weeks other teams or department employees have to work from office.

Pros: It prevents overcrowding; helps maintain team dynamics; allows face-to-face meetings and experimentation.

Cons: It increases operational costs and inter-team interactions; implementation might be slow.

3. Division of employees: Assign work from office/onsite or work remotely to the team/department based on the nature of the job. Some companies, based on the nature of business, have more jobs that necessitate working from office, like power plants, construction companies etc., while IT companies can afford to provide remote work option to most of the employees. Hence, the differentiation is in between:
 - i. Remote team vs. on-site team

Pros: Improves efficiency of employees

Cons: Having two different sets of work arrangements may cause conflicts among and between the groups. For instance, employees assigned to work from office on all working days may perceive those employees with the hybrid work option experience flexibility. While employees working remotely may believe that they are missing out on something in relation to their career and professional development or may suffer from Opportunity-Fear of Missing Out (FOMO) which may impact their performance, job satisfaction levels and work-life balance. (Todd, 2021)

Emergence of Hybrid Workplace Model

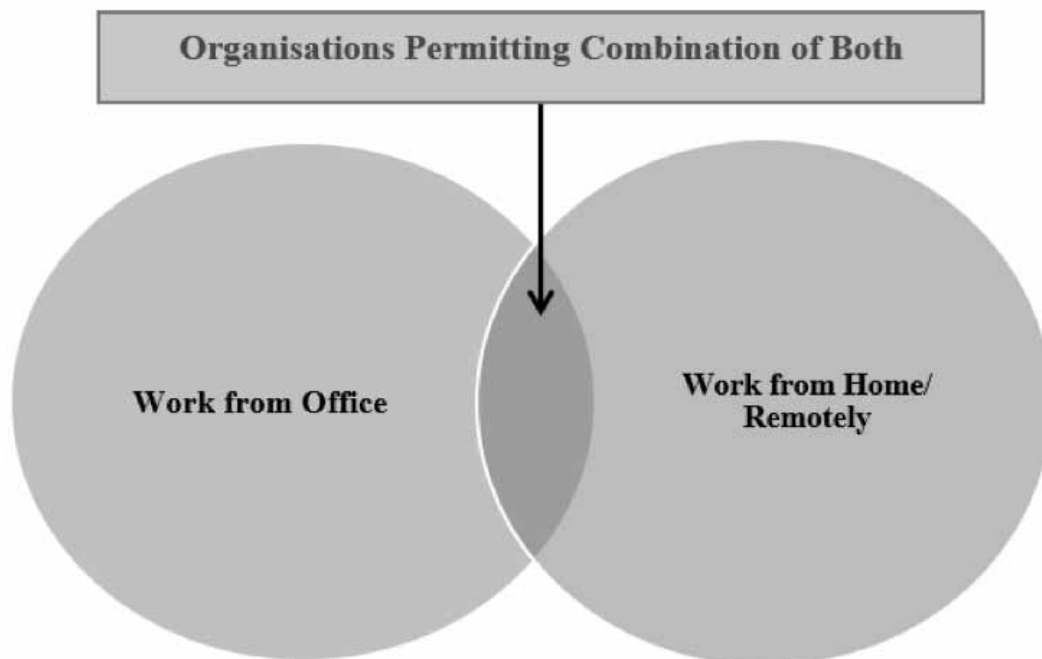
COVID-19 Pandemic, The New Game Changer

The COVID-19 pandemic changed the lives of many people in different ways. Some of them lost jobs, others who could WFH were forced to do so and thus the businesses that were carried out in office during pre-pandemic period were made to work remotely overnight. This was done to ensure that the virus does not spread amongst the employees. However, the employers expected their employees to report back to office, once they were vaccinated (Back, 2021). This produced mixed responses from employees.

Many employees enjoyed the comfort of working from home, being with the family and managing the household chores, without compromising on productivity. Hence, they demanded that they be allowed to WFH, going forward. Yet, there was another category of employees who preferred working from office as their personal life interfered with their work-life and were finding it difficult to meet targets. Few others felt suffocated as they worked in isolation, without socialising with their colleagues. To accommodate the demands of the myriad workforce, thereby reducing employee attrition, and to meet the organisational requirements, a hybrid work model was adopted by some organisations which was not much in vogue, earlier. This resulted in the birth of a work model which facilitated a combination of both remote work and on-site work (Figure 1 and Figure 2). A hybrid work model took care of the employees who desired to work remotely as per their convenience on one hand, and at the same time provided a platform by throwing open office space to nurture a team culture, which acted as a fuel for idea generation and innovation, giving the organisation a much-needed competitive edge.

Figure 1. Hybrid workplace model framework

Source: Created by authors

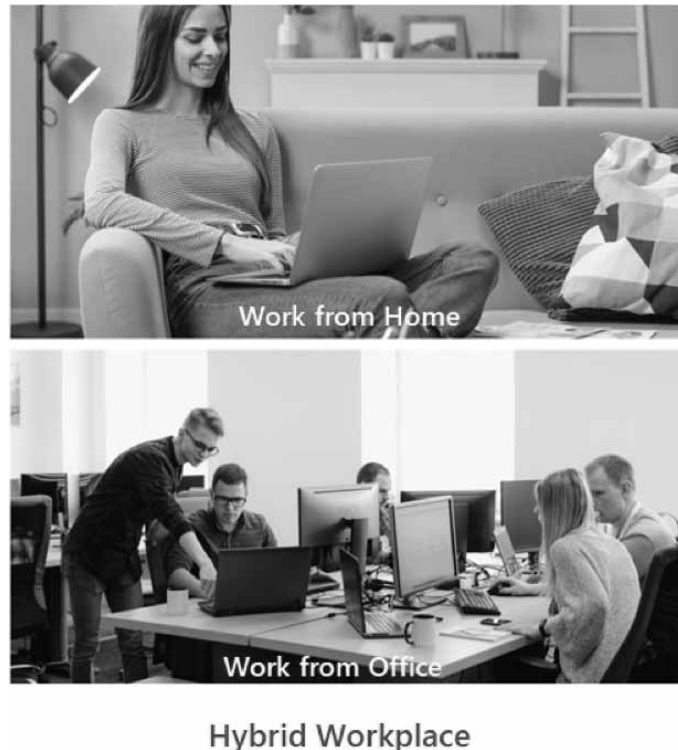


Future of Work Places

Figure 2. Work from home/ remotely + work from office = hybrid workplace model

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The problem most of the companies are facing is with respect to how this new workplace model could be implemented successfully in their Organisations. The chapter looks at reasons for companies to adopt this model, its applicability across various industries, structural variations, preparedness towards adopting the model, enablers, implementation, measures to check its workability for Organisations that adopted the model, the problems faced and possible solutions.

The chapter is based on the review of secondary data from various articles, expert opinions etc., as very few organisations have initiated this process. It highlights the challenges they faced or could face at various stages, the initiatives they have taken or should take to plug the gap. There are varied research methods that can be applied for collecting and understanding this new workplace trend. One such method is the Grounded theory (GT) approach. It is an inductive method with systematic guidelines for collecting and analysing qualitative data with an aim to build a theory (Charmaz, 2001). Since the hybrid workplace model is a novel and emerging concept, not only for the academicians to study and understand but for the corporate to decipher and practice it flawlessly. Therefore, it is suitable to use the GT approach only when more and more organisations progress towards hybrid workplace model and experience various challenges in the course of realising outcomes. It is premature to use GT approach at this stage. By doing so at later stages, one can discover what worked well with those companies that adopted hybrid workplace model and what did not go well; the possible solution that can be arrived at,

to develop newer tested models that proved to be successful and could be applied by other companies adopting the same model.

Reasons for Companies Promoting Hybrid Workplace Model

The organisations have realised that the productivity has considerably increased while working from home during the pandemic, as employees had worked not only as per their convenience, but had gone an extra mile to give the best results, thereby sustaining their jobs. It also helped them in saving cost on space, electricity charges, water charges and on other facilities like cab, canteen etc. It also opened the door to access new pool of talents globally especially those who were not able to work or continue their work due to personal constraints in taking up work from office (Maurer, 2021). Though initially they were very apprehensive about the outcome of WFH model, they were able to benefit from it. Hence, when some employees demanded the freedom to work either remotely or from home, the employers were open to consider it and thus Hybrid workplace took shape. Nevertheless, it is not devoid of challenges, including designing appropriate policies, infrastructure, structure, processes etc., to facilitate employee engagement in the new workplace era.

Adoption of Hybrid Work Model Across Industries

There had been varied impact of hybrid work model across different sectors. A study showed that the productivity level had shot up as much as 47% while working remotely in some companies, while other companies had struggled due to the nature of the jobs which involved mandatory physical presence, ensuing cybersecurity concerns and access to internet technology by employees (Westfall, 2020).

A survey undertaken by McKinsey Global Institute in terms of remote work productivity, involving 2,000 different activities across more than 800 occupations in U.S., revealed that jobs in the field of IT, management and education were amongst the least impacted. However, few industries depending on equipment and machinery, including construction, agriculture and food services were predicted to be severely affected. This had been proven especially for construction sector, according to the sectorial analysis carried out in 2021. Alternatively, the legal and finance industries proved to be unsuccessful with WFH/remote option in spite of prior forecasting that finance industry was compatible with WFH. Banking firms like JP Morgan encouraged employees to work from office.

Some of the companies that were not willing to adopt Hybrid Workplace model had reported client data confidentiality, and faster and secure access to vital documents in office setting as the primary reasons for non-adoption. Nevertheless, the retail and hospitality industry registered severe impact in terms of employee turnover owing to inflexible work hours and safety concerns while dealing with customers (Susko, 2021).

Lund et al (2021) reported that the jobs involving higher physical proximity were found to be the most affected during the pandemic. This included work that demanded on-site customer interaction namely, medical care, banks, personal care, post offices, on-site customer service, retail stores, leisure and travel. Many of these organisations were forced to switch to e-commerce and other technology-based platforms as a means to sustain during the pandemic. The leisure and travel sector, which included hotels, restaurants, airports and entertainment venues, were amongst the most affected, as many were either closed down or operated on limited basis during the pandemic. Nevertheless, they are expected to bounce back as and when the situation improves, with certain necessary changes as deemed appropriate in those

times. It had been noted that in future, computer-based jobs involving moderate physical proximity and moderate human interactions have potential for remote work. However, jobs involving lower physical proximity and fewer interactions, especially the outdoor operations and management, including construction sites, outdoor maintenance spaces and farms would be amongst the least impacted. The pandemic forced business houses to rapidly imbibe new behaviour that is likely to continue in future till the next crisis strikes again in some or the other form.

Structural Variations in Hybrid Workplace Model

Once an organisation decides to adopt a Hybrid Workplace model, the next question that arises is about the variations that employers can use while adopting the model. The decision-makers are faced with the dilemma as to whether or not to provide employees the flexibility in choosing the work schedule. In other words, either employees will be given full flexibility to choose the days they can work remotely and the days they need to be on the office premises, or the work schedule and style will be solely defined by the company. Clearly, these two models are polar opposites and can pose risks related to either having team culture, diversity, work-life balance, space management or not. According to Krishna Kutty, Managing Partner & Co-Founder of Kuroshio Consulting Inc., not all executives had the vision and plan to change to a hybrid workplace. In order to implement a Hybrid Workplace model, the executives needed to figure out the specifics in terms of level of centralisation, the days to be notified for remote work, the roles that could be fully or partially remote, cost effectiveness and so on (La Duke, 2021).

If the organisation had decided to adopt a centralised workplace model, the initial step was to determine the level of centralisation that best works in the organisation. The HR Head would have to take a call on the days the employees could work remotely and the days they need to be available for work on the office premises. For example, Apple has adopted centralised hybrid workplace model, wherein the CEO, Tim Cook had defined Mondays, Tuesdays and Thursdays as the in-office days, and Wednesdays and Fridays as the remote work days for employees, in a week. Though this kind of flexibility might not be convenient to all the employees, it will serve the purpose of having all the employees together for team meetings, customer interacts etc. in an organisation. It prevents the risk of isolation and gives them a feeling that they are the part of the same organisation culture.

Decentralisation model on the other hand, empowers the employees to select their WFH schedule that offers high level of flexibility, but it poses risk of fragmented team culture. This may benefit the employees who have the privilege of being in-person and have proximity with the reporting manager to gain advantage over other employees in many aspects.

There is one more type of hybrid model which is a combination of the above two options where the CEO sets the number of in-person days in office while the team manager or reporting manager determines the team schedule to be in office. Google follows this model. Though this model also exposes a company to various risks, in terms of culture, diversity and fairness, it is better compared to the other models.

Deloitte's Human Capital Trends Report 2021 highlighted the need for extending well-being beyond work-life balance into the work and life itself (Reilly, 2021). The hybrid models pave way for integrating well-being into work through creative work designs. It enables organisations to graduate from a functional mindset to an enterprise mindset, reengineering work based on unique human capabilities. The role of virtual leaders in managing the transition to the hybrid model becomes paramount. In an effort to strike a balance between flexibility and productivity, these leaders need to implement innovative interventions based on their past experiences at the same time focus on predicting future requirements by acting on

real-time workforce insights. As instruments of change, the hybrid models, if effectively designed and implemented are bound to set new directions for work and workforce, in the face of uncertainty.

PREPAREDNESS TOWARDS HYBRID WORKPLACE

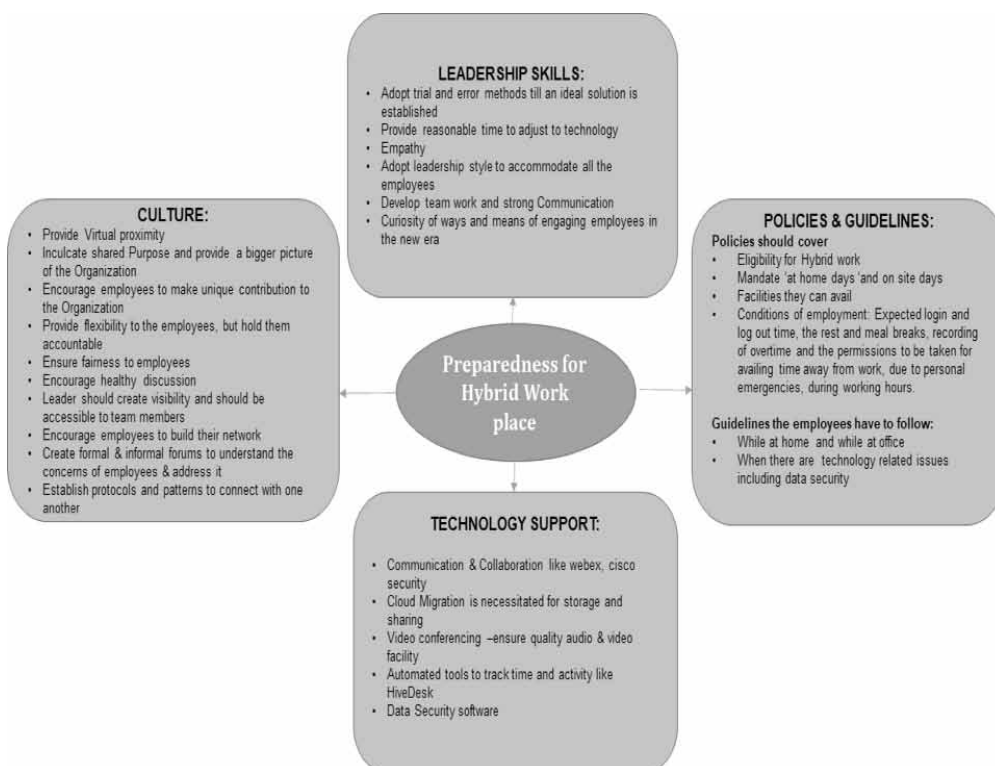
Preparing the Organisation to be Ready for the Hybrid Workplace Model

Once the decision on the level of centralisation needed for the Hybrid Workplace model has been finalised, the HR head has to conduct an in-depth review of the roles and activities of the individual employees within the organisation. Later, categorise them into those roles that can be made completely remote, partially remote and those that require the employees being physically present in the office. Accordingly, the appropriate hybrid model that is suitable for the respective organisations could be determined. The managers have to be provided training in managing team both remotely and at office which involves virtual team connectivity, level of documentation and the soft skills like empathy, patience, team effectiveness and so on. Further, it calls for checking on the costs and financial benefits effectiveness, deciding on the action plans for implementation and communicating the same to the employees to reduce uncertainty and stress related to the future workplace dynamics.

The four major constituents, that facilitate a smooth transition towards a hybrid workplace, namely, the organizational culture, well defined policies and guidelines relating to hybrid work, technological readiness and leadership skills needed to manage the hybrid work model is illustrated in Figure 3:

Figure 3. Constituents that support hybrid workplace

Source: Created by authors



Culture that Facilitates a Hybrid Work Model

Culture had been a critical component in the success of any organisation. According to Kotter (2011), the growth in an organisation's revenue, stock price, net income and retention of its workforce had been determined by the effectiveness of the organisation's culture. Dension (1984) had demonstrated that culture had positive correlation with return on investment and return on sales. A survey conducted by Gartner, Inc. in 2020 highlighted that almost 30% of leader's biggest concern is to maintain the organisational culture in a Hybrid Workplace model (Baker, 2020). Hence, one of the greatest challenges for the business leaders is to create, foster, and cultivate constructive culture that suits people working across multiple spectrums. However, the fact that people are adaptable and businesses are resilient would help the culture to thrive, if given the right kind of focus.

Hybrid Workplace model can be effectively implemented in a culture wherein certain conditions could be fulfilled. It involves creating proximity virtually as it would bring in closeness, connectivity and improve employee engagement levels that would lead to success of both individuals and organisation; inculcating the shared purpose; and presenting a bigger picture of the overall objectives. It is also imperative that the employees are made to understand the importance of the unique contributions they make in their team, in spite of them not being in office together. When the organisations have come forward to provide the employees flexible work environment by giving space as per their convenience, the employees should be held accountable for their performance. Fairness should be ensured as there might be a feeling that those employees working more at office than at home will be favoured. The reporting managers should communicate the outcomes of the work clearly to avoid such problems. Conflict is the outcome of healthy discussion or debate that happens in an organisation. At present, with the jobs being partly remote and partly at office, it might become less constructive, but leaders need to be attuned to the potential differences and provide a platform that facilitates healthy disagreement upholding protocols that leads to a civilised and respectful behaviour to start with. Leaders should create visibility and accessibility to their team members. They should also encourage tasks that bring in collaboration that develops close relationships with one another. Above all, since the employees are allowed to work either from office or home, they may not get to know what is happening around them and therefore there should be open communication and transparency that creates trust amongst the employees. Hybrid work situation may have impact on social relationship unlike earlier times, where employees worked from their company cubicles. It is therefore, very essential to intentionally encourage employees to build their networks. Managers of today need to strive to create formal and informal forums that connect people of various departments by providing cross-functional learning opportunities, organising virtual coffee meets or arranging for networking discussions with colleagues across the company; designing office space in such a way that people can focus, socialise, collaborate and rejuvenate to offer them comfort, but at the same time have control over their performance. It also calls for the establishment of protocols and patterns that enables the team members to relate and connect with each other effectively. It could be achieved by specifying the core working hours on certain days that all the employees need to be available and by implementing processes that would help to optimise time so as to nurture a culture that positively influences performance (Brower, 2021).

Hybrid Work Policy Considerations

Hybrid work policy should clearly specify the different remote work options available to employees. It should also specify the eligibility for employees for taking up hybrid work option, which has to be decided by the HR department after a thorough review of the job descriptions, as each job necessitates different requirements. The companies should mandate 'at home days' and 'on-site days' in a week as it would provide an appropriate structure to their hybrid work initiatives. For example, Apple has made it mandatory for their staff to work from office on three days a week, namely, Mondays, Tuesdays and Thursdays and work remotely on other working days. The proponents of Hybrid Workplace model have advocated the importance of apportionment of designated days for remote and non-remote work, as a means for effective collaboration and culture-building. The option of offering 'at home days' which could be redeemed later on mandatory 'in-office days' also provides additional flexibility to employees (Hinds, 2021). The hybrid work policy should have explicit guidelines that the employees have to follow while working from home or from office. This could include the expected login and log out time, the rest and meal breaks, recording of overtime and the permissions to be taken for availing time away from work, due to personal emergencies, during working hours. There should also be an emphasis on the measures to be taken for handling issues related to technology and the data security precautions to be taken by employees while working on hybrid mode. Since hybrid work is here to stay, the employers have to prepare for this new normal by providing policies and guidelines that encourages the work environment for successful performance. For sample hybrid work arrangement policy refer to Appendix 1.

Technology Readiness to Support Hybrid Workplace Model

It is very essential for the organisations adopting hybrid model to provide the right tools and techniques for ensuring uninterrupted work, proper communication and collaboration with the emergence of hybrid workplace. Technological upgradation is the need of the hour. In order to enable teams to work remotely as per the employees' convenience, cloud migration is necessitated. The companies have to improve audio and video quality of conferencing technology, provide timely training to employees on technological platforms, educate their staff on the basic troubleshooting techniques, so as to facilitate a smooth transition. In order to ensure that the resources are utilised effectively, automated tools could be used to track the time and activity of employees during regular working hours, by taking periodic screen shots and monitoring activities to promote accountability and to measure productivity (HiveDesk, 2021). The corporate could also reinforce the use of security software to identify and access management tools and policies to ensure safe access to confidential information while working remotely. However, though the technology comes to the aid of the companies in introducing Hybrid Workplace model, human touch will be missing unlike earlier.

Managerial and Leadership Skills Needed While Switching to Hybrid Workplace Model

A new set of managerial and leadership skills are required to succeed in the hybrid workplace. Managers should be aware that being in a transitional phase in the hybrid journey, it takes time for the team members to adjust to hybrid work, familiarise with new office policies and create the right workspace design to maximise productivity. Leaders need to understand the need to adopt trial and error methods

over a period of time, after which the required balance and flexibility would be established. Sufficient time should be allotted to employees to learn the hybrid conference tools like Zoom, Microsoft teams or Cisco Webex. The decision-makers should be able to empathise with the employees as there are several factors that influence their performance in the hybrid sessions - from childcare, to helping kids manage online classes, to healthcare, to managing household chores. Since some employees would be comfortable working from home while others might not, it is important for the manager to be aware of the hybrid needs of the subordinates and tailor his or her leadership style to accommodate them all, as far as possible, while maintaining effective teamwork and strong communication. The leader should also explore the different ways and means of engaging the employees virtually so that they could have fun while working across various locations (Dube, 2021).

IMPLEMENTATION

Implementation of a Successful Hybrid Workplace Model

The hybrid workplace model could be successfully implemented if the flexible work policies provided are clear and transparent. Managers should interact with the employees virtually or otherwise on one-to-one basis, share timely information, be mindful of their requirements and treat them with dignity and respect. Few sessions could be devoted towards understanding the concerns of employees as they adjust to the new work model. Organisations need to provide the facilities needed for employees to upgrade themselves in the new normal and beyond. The companies adopting the Hybrid Workplace model would have different employees reporting to office on different days, making it difficult for them to manage the staff inflow and outflow. In order to maximise resource usage, 'flex desking' concept could be introduced, wherein every morning before coming to the office, the employees can pre-book their desk. This arrangement would help the employees block the desk whenever required, and at other times, keeping it open for use by other employees. Prior intimation proves highly beneficial to the supervisors, as they would be able to make suitable arrangements, monitor and regulate the number of employees in each location. Desk scheduling software like Kadence, not only enables employees to make need-based reservation of office spaces with ease and dexterity, but also provides data on how space is used, which helps in optimising workplace requirements. Those assessments based on the historic data would help the organisations' facilities management team, in forecasting future workspace usage. Hybrid work environment necessitates teamwork rather than individual work. It is therefore important to embrace virtual collaborative tools to regulate the activities in case of physically dispersed workforce. It would help in assigning tasks, communicating, discussing projects and sharing knowledge among the team members thereby increasing the outcome while saving money, time and energy. The employees working under the hybrid model would be able to deliver effectively only if their employers nurture collaboration, participates in problem-solving, knowledge transfer and focuses on creating a supportive work environment. Periodically, satisfaction surveys have to be conducted to take stock of the situation and to improvise the environment to enable enhancement of employee performance (Gupta, 2021).

Facilitation of fair Hybrid Workplace

Hybrid Workplace model has proved to provide potential benefits to the organisation in terms of flexibility, labour cost optimisation, reduced carbon footprint and improved performance on one hand while upholding proper coordination, networking, socialisation, creativity and collaboration on the other hand. However, it could be intricately tied to power dynamics that could bring in differences among team members, which in turn might damage relationships, impede collaboration and ultimately affect performance. The manager therefore, should recognise the shortfalls that exists and actively learn to manage the two different sources of power to facilitate hybrid work, namely, hybridity positioning and hybridity competence. Hybrid positioning problem arises as employees working at office would have more visibility and sail smoothly as they have support from within but those working remotely may be less noticed and would not be fortunate enough to have the necessary support. Their efforts go unrecognised most of the times. Hybrid competence differs with respect to individual employees. Employees who have good interpersonal relationship building both virtually and face-to-face manage to get what is required from their reporting manager. They are rewarded for their adaptability in the given situation, whereas, those employees who are not good in relationship building would be struggling to work with others and may not be able to sync well with managers and colleagues. The study by Mortensen and Haas (2021) revealed that a person in a disadvantaged position would still be able to work effectively if he/she has high hybridity competence while someone in advantaged position may be ineffective if he/she has low hybridity competence. The organisation should therefore focus on hybridity positioning and developing hybridity competence among employees. Employee having high hybridity competence can emerge successful even if the situation is unpredictable. The role of managers becomes crucial, wherein they are expected to track the employees, understand the problem, communicate and guide the employees. They need to design an environment that does not give undue advantage to few employees, educate and create awareness on power imbalances in order to avoid bias, monitor key intervention moments like onboarding, team launches, performance review and evaluations, and also reward and recognise those employees who deserve it.

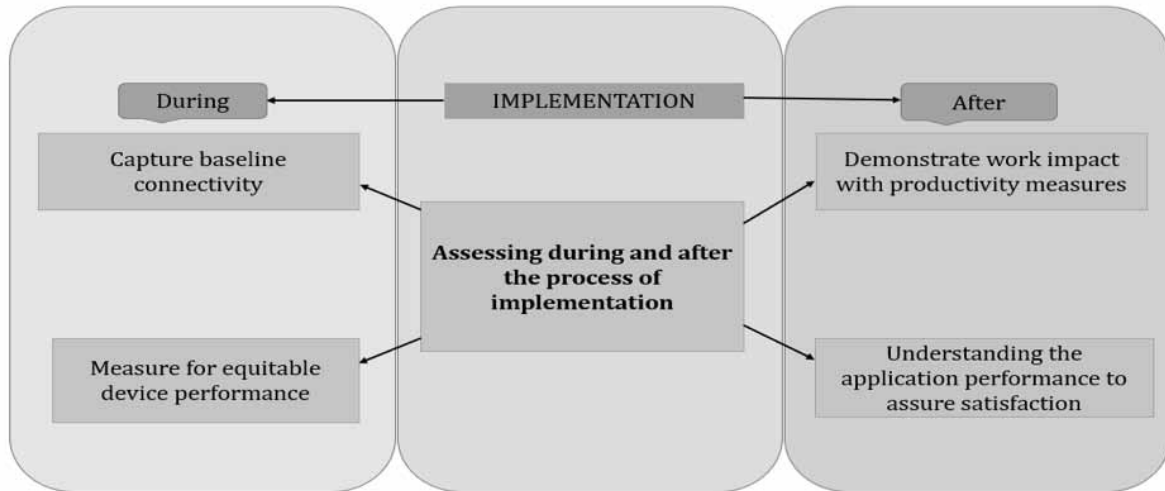
ASSESSMENT

Assessing During and After the Process of Implementation

The success of the hybrid model's working conditions could be measured by four key performance indicators (KPI) cited in Figure 4:

Figure 4. KPI for assessment during and after implementation of hybrid workplace

Source: Created by authors



- i) **Capture baseline connectivity:** The first step to track performance could be by taking into consideration employee's home Wi-Fi performance– to understand if the employee is far from the access point or not; and checking the network connectivity via internet service provider to gain insight on employee's digital experience.
- ii) **Measure for equitable device performance:** Determining which device supported the hybrid work could be analysed by measuring the current devices' performance and comparing baselines across the employee ecosystem. Instead of using desktops, laptops need to be encouraged as they would be more convenient and would be easier to ensure that performance is consistent and equitable for both in-office and remote work.
- iii) **Demonstrate work impact with productivity measures:** Measuring employee productivity after the introduction of the hybrid model, for a particular period has been deemed necessary in performance monitoring. This KPI required the assessment of employee performance in terms of work volume (critical outcomes of sizable quantity) and worker usage (time spent on critical operations).
- iv) **Understanding the application performance to assure satisfaction:** This KPI focused on the experience of handling various technology related issues such as application crashes, system hangs or errors that would be critical for performance. The satisfaction levels showed the extent of employee engagement involved in the hybrid work arrangement (Aternity, 2021).

Ultimately, all the above are aimed at elevating end user experience.

ORGANISATIONS THAT HAVE ADAPTED TO NEW ERA OF WORK

Going hybrid had been much more than just being functional. Its success rate is dependent on the company culture, especially in terms of the freedom provided to employees, their adaptability, the leadership style that well supported the proposed work model and the degree of prized innovation. The overall suc-

cess of the hybrid models employed by organisations could be assessed based on where each company would fall on the hybrid spectrum with reference to all the parameters cited above. The companies would differ in their approaches while going hybrid, from their emphasis on teamwork and collaboration, to flexibility, to employee well-being.

Hybrid Workplace Model with Key Focus on Flexibility

Brian Armstrong, the founder of Coinbase, perceived the Hybrid Workplace model to be a democratising move and ensured career growth opportunities for all the employees irrespective of wherever they are located. Equinix, a multinational company, focused on flexibility for employees. They had emphasised the absence of location requirement for staff, wherein they could drop into any co-working space that they have booked in certain locations. The organisation had also provided its employees with flexible digital infrastructure to enable working from various locations as part of their long-term strategy during the pandemic and beyond. Further, they are driving towards enriching employee workspace experience by having hybrid meetings where Zoom call launches automatically as the employees enter the pre-booked meeting room. Airbnb CEO and co-founder, Brian Chesky had remarked, “Employees are in charge, not companies”. Airbnb had adopted an agile and decentralised business model by allowing their employees to operate from any chosen location. The policies of understanding the employee needs and accordingly accommodating them have helped Airbnb in attracting and retaining talent.

Hybrid Workplace Model with Key Focus on Teamwork

Figure 5. Virtual team in hybrid workspace

Source: People photo created by freepik - **Error! Hyperlink reference not valid.**>



Future of Work Places

Google, Facebook, and Fujitsu are examples of companies that have boasted of exemplary infrastructure, and have enabled their team members to collaborate and connect to one another effectively. Google's new meeting rooms referred to as Google Campfires, provides a semi-circular seating arrangement, which could be quickly reconfigured to meet the varying hybrid meeting needs. It lays out vertical digital displays wherein distant attendees details dialling in to participate in meetings are instantly displayed. Fujitsu created hubs to encourage creativity, co-creation, and address unexpected encounters between colleagues. Satellite communication and shared office spaces have facilitated better teamwork and operational efficiency in the hybrid space. Facebook expected employees to work remotely but come to office for culture enhancement, training initiatives, partaking in important meetings and events. The company has been known to use social media extensively for recruiting senior level staff who are backed up by rich experience and may not need further training to get them started.

Hybrid Workplace Model with Key Focus on Employee Well-Being

Intel had incorporated few cultural changes to reduce the load on remote workers. It included initiatives to combat employee fatigue by promoting meeting free Fridays, ensuring shorter meetings and encouraging days off, in an effort to provide work-life balance to the employees. Microsoft expected its employees to return to office in a phased manner, which included remote-only to fully open campuses, yet keeping alive the hybrid work and flexibility. They developed agile workspaces that fostered collaboration and diversity. Coda, the online collaboration firm, had made modifications in its company culture that focused on inclusive shorter meetings wherein meetings were generally scheduled for 1 pm. The company-wide social hour had been introduced to reduce seclusion by conducting various programs like quiz, cocktail-making, and online games.

Netflix, on the other hand, holds a traditional outlook and expects its employees to return to the office, i.e., four days in the office and one day to work virtually from home.

In general, organisations adopting Hybrid Workplace model may fall on anywhere on the workplace spectrum, ranging from being fully remote to being fully present in office. The in-between path is preferred by most of the organisations. Hybrid ranges from office first, where remote work is allowed, but working from office is preferred to default digital, where employees are expected to work remotely except in case of a requirement, they can work from co-working spaces available. Offices need to be redesigned to accommodate hybrid working model that supports collaboration, addresses uncertainty and provides workstations for remote work. The company culture, policies, and processes too have to undergo transition to accommodate the change. Remote workers may feel isolated, or suffer from burnout or being left out. In order to help them out, they have to be engaged by the organisation. The organisation needs to be mindful of the challenges faced by employees so as to nurture a happy and productive workforce. To regulate the workspace occupancy, certain specialised tools like Kadence could be used coupled with other facilities that could provide them with the best office experience (Chan, 2021).

PROBLEMS OF HYBRID WORKPLACE AND POSSIBLE SOLUTIONS

In the current business scenario, Indian companies are also trying to adopt hybrid model of various configurations owing to various factors influencing the above transformation, the tremendous effect being from employees desiring flexible work options. Though it is triggered by employees, the organisations

also get benefitted from the workplace model. However, there are certain major challenges the companies may face while adopting this model like issue of unequal work distribution unable to know the workload of each employee thereby making employees feel ignored and disinterested in their work; maintaining standard and working ethics; employee engagement while at office, apart from unique set of challenges each company may encounter for which they have to find solution on their own.

Some of the common problems highlighted can be tackled by an organisation in the following ways:

- i. Manager has to check the workload of each and every employee reporting to him/her and follow up with them regarding the tasks assigned for effective work distribution.
- ii. The organisation has to be very transparent and encourage whistle blowing in case of any unethical practices and take measures to address it. Communication etiquette that has to be strictly followed should be prescribed so that there can be standardisation while the employees are working from various locations.
- iii. Team leaders should organise get-togethers periodically for the entire team to encourage interaction and also informal online sessions where the employees are stimulated to chat freely and share ideas that may pave way for innovation. It also brings in connect among them that is essential to achieve the necessary support and guidance when required.
- iv. To encourage employees to come to office and keep them engaged, the organisations should deliver certain facilities that their home or remote office doesn't offer them, like making the workplace welcoming to employees by providing convenient work arrangement, provision for fun activity during free time etc. (Smarta, 2021).

FUTURE RESEARCH

As the Hybrid Workplace model is a very new approach that has emerged during the pandemic, the scope for further research will be to evaluate the success of the model in terms of improved productivity, cost minimisation, employee retention etc. The research can identify problems or controversies if any to improve the framework and come up with more innovative interventions. In future, there is a possibility for hypothesis testing by identifying the dependent and independent variables in the Hybrid Workplace model.

CONCLUSION

Hybrid workplaces were created to accommodate all the employees in the organisation who are either interested in working from home/remotely or from office. It is meant to give employees the freedom to work from anywhere, enabling them to balance their work-life without compromising on efficiency. The organisations that have adopted this model are likely to reap benefits in future though they have to face certain challenges, as it outweighs the potential negatives. The organisations that have adopted the Hybrid Workplace model have to invent and reinvent policies, structures, procedures and processes suitable enough to engage the workforce for an ideal result, needed to thrive in the new normal.

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KEY TERMS AND DEFINITIONS

Cost Minimisation: It refers achieving the objectives of the organisation by optimum utilisation of resources.

Culture: It refers to the behaviour that needs to be cultivated among people for the benefit of the organisation they belong to, which is generally acquired through learning or experience and transmitted to others through social learning.

Employee Attrition: It refers to employees parting from the organisation due to voluntary quits, termination, death, or retirement.

Employee Well-Being: It refers to the physical and mental health of employees resulting from work dynamics within and sometimes outside the organisation.

Flexibility: A situation an individual employee encounters during the course of work in the organisation due to which he cannot follow the normal working conditions, but the organisation supports by allowing short-term changes to adjust and deal with the situation to continue with the tasks.

Leadership: It is the process where a leader inspires and motivates his/her subordinates to act toward achieving a common goal.

Pandemic: An epidemic that can spread all over the globe.

Productivity: A ratio of output is to inputs within a given time period without compromising on quality.

Remote Work: A type of flexible working arrangement that permits, an employee to work from remote location, away from office premises.

Technology: It denotes the sum total of all the skills, methods, processes, techniques etc., required to produce goods or services in order to achieve the objectives.

Work From Office: An office building that provides facilities and an environment that necessitates employees and managers to work during the prescribed working hours in a day.

Workplace Policies: It refers to the statements approved by the leadership team that acts as a framework that guides the thinking of Managers in decision making at workplace.

APPENDIX 1.

A Model Sample Policy Developed by Authors with the Secondary Data Available

Hybrid Work Arrangement Policy: ABC Ltd. Company

The Vision, Mission and Values of ABC Ltd. Company: To provide transformational workplace based on employee experiences and expectations during COVID-19 pandemic while working from home or remotely to accommodate their demands and to adapt to the changing world around us.

Consideration of Hybrid workplace: Hybrid workplace provided to the employees is a privilege, not entitlement or benefit that is granted by the company and it is at the sole discretion of the company to revoke it at any point of time with changing business scenario and two weeks prior notice of such change will be given to address any concern arising from ending the hybrid work arrangement.

About Hybrid Work arrangement: It is an approved ongoing, regularly scheduled work arrangement that allows employees to perform work during any time or part of the employee's regular work hours at an approved alternative worksite such as an employee's home (remote office) other than office.

There is a continuum of hybrid work arrangement based on nature of work, hours and schedule of work, i.e.,

Hybrid Occasional: This involves jobs that necessitate the employee being present at office as per the role assignment. The employee may be permitted to work hybrid occasionally on prior approval of the supervisor informally and the decision will be on case-to-case basis. Once the employee is granted permission, he/she should not expect regular scheduled continuance. However, if the supervisor feels that the instances of regularity of occasional hybrid work increases and operations of the department are not hampered, he can convert the job into formal hybrid workplace arrangement with proper documentation.

Hybrid 50% or less: Regular scheduled work with formal hybrid workplace arrangement that the employee is allowed to work at office up to two days per week or 5 of 10 days biweekly.

Hybrid greater than 50%: Regularly scheduled remote work of at least three days in a week or up to 6 in 10 days bi-weekly. This requires a formal hybrid workplace arrangement agreement. They will be eligible for part-time parking space or on preference basis. Given that their primary work location is remote, such employees can avail hostel/hotel facility on request while on office premises on availability. Employees with this arrangement have a dedicated individual work station on office premises.

Fully remote: Regularly scheduled to work full-time off office premises. Occasional presence on campus might be required and, on their visit, they have to pay parking fees for the facility. Given that the primary work location is remote such employees will be provided hostel/hotel accommodation if required on request based on the availability. Employees with this arrangement will not have a dedicated individual workstation on office premises.

Criteria: Not all jobs are suitable for hybrid work. The decision on providing hybrid work solely depends on the HR Manager after thorough evaluation of the proposal from either the reporting manager or based on request from the employee. The decision is based on company suitability, role suitability, employee suitability and supervisor suitability-eligibility conditions have to be clearly specified to avoid any loopholes in providing the appropriate hybrid work arrangement for the employees concerned.

Employee Eligibility: The minimum qualification to be eligible for hybrid work arrangement is on completion of 6 months service in the organisation, regular employment with a satisfactory performance record.

Hybrid Work Arrangement Locations: Hybrid work arrangements will be within a 100-mile radius from the office premises. However, some hybrid arrangements that are not within the given limits may be pre-approved by HR as they have to ascertain that the policies, practices, compensation, taxation complies with the legislations of the respective place where the employee resides. Overseas arrangements are generally not permitted due to export control considerations and may affect visa status. Exceptional cases will be approved by Executive leadership team.

Hybrid Work Arrangement Agreement: Hybrid work arrangement is decided by HR based on thorough consideration of various factors. If the employee, reporting manager, and the executive committee approve, the agreement can be prepared and signed by all parties concerned and a two-month trial period will commence. The signed agreement is valid only for the position, employee assigned, and location specified. Agreement is for one year and can be renewed for one more year, if required. If the employee moves to another state or country during the course of the contract, it becomes null and void. If the employee comes with a request for new workplace arrangement, it is at the discretion of the executive committee to decide if the request may be considered or not.

Emergencies or Unexpected Contingencies: In case of any emergency situations such as natural calamity, fire or significant disruption of work, accidents, reporting managers have to ensure that critical operations, services are carried out by establishing emergency hybrid work arrangements for a limited duration with clear-cut guidelines as safety, confidentiality of work, cyber security and integrity of work cannot be compromised till normalcy is restored. The competent authority has to notify in writing the condition that necessitated such an action and the time it began and the time it ends. If the employee is not able to work due to poor internet connectivity, he/she should return to the office premises for work or take vacation with the reporting manager's approval and compensate for it later.

Compensation and Benefits: An employee's compensation and benefits will not change until his position changes and he is assigned with new duties and responsibilities. Expenses for travel to office and back have to be borne by the employees.

Tax implications: The employee should determine tax and is responsible for any tax implications as the rules of the place. He/she has to take the responsibility for fulfilling all the obligations solely in the above area.

Hours of work: The working hours will remain the same as scheduled regardless of the work location. Non-exempt employees are always required to maintain a record and report the time worked. Failure to accurately report the time worked may result in termination of hybrid work arrangement with appropriate disciplinary action.

Travel: Employees who might have to report for meetings or events at an alternate location or at a different geographical location for official purpose may with prior approval from the concerned authority get travel expenses reimbursed.

Leave: The hybrid work is not intended to stop use of sick leave, earned leave, casual leave etc. by the employee. They can avail all the leaves as prescribed by the company but have to avail it with prior approval or have to intimate the reporting manager in case of any emergency situation.

Equipment: The Company provides laptop, computer, and the accessories required appropriate for the job requirement that employees can carry to any location and it is of standard configuration with the

approval from Information Technology services. Employees must have internet connection that is fast and stable so that it can support email, chat, video conferencing and other day-to-day work tasks. Cell phones, webcams, printers and other hardware will be borne by the employees. If specialised hardware or software is required, it may be provided on prior approval from the Executive committee.

Office supplies: The Company will supply the employee with appropriate stationary items like pen, paper, etc. The hybrid worker should follow the protocol of the company-first get supervisor's approval, make arrangement to collect supplies. For certain pre-approved business-related expenses for carrying out the job, shipping costs incurred by the employee will be reimbursed.

Workspace and Work Environment: Employee should establish a remote work environment. The company is not responsible for the cost associated with setting up remote work office. It is the responsibility of the employee to ensure confidentiality and safety at the designated location. Employees having hybrid work arrangement of greater than 50% will be provided dedicated workstation at the office premises and also accommodation to stay in a hotel while on office premises.

Condition of Employment: The conditions of employment will not change with hybrid work arrangement. Reporting manager and the employee should mutually agree for hybrid work arrangement based on the business needs or the HR can advertise to hire a candidate for the position considered. If the company needs to make any change in work arrangement, two weeks prior notice will be issued to the employee.

Termination of the Hybrid Work arrangement: All hybrid work requirement are subjected to review by the reporting manager and Human Resources Manager and is at their discretion to terminate at any time by giving notice two weeks in advance. Refusal to return to office will be considered as a voluntary resignation by the employee.

Chapter 2

Strategic Responses of the Organization to the COVID–19 Pandemic Crisis

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ABSTRACT

The purpose of this chapter is to present a model of strategies that, on the one hand, are to prevent the spread of the crisis and, on the other hand, limit its negative effects and prepare the organization for a further escalation of the pandemic as a result of the emergence of new variants of the SARS virus. These activities can help the organization stabilize its functioning, stop the spread of the crisis and limit its negative effects, and prepare the company for a further escalation of the pandemic (long COVID-19). On the basis of literature studies and research reports and actions taken by organizations in the conditions of the crisis caused by COVID-19 were distinguished. These activities were analyzed, which allowed the presentation of a strategy model (resilience strategy, long-term strategy, HR strategy) that can be used within the organization to deal with a pandemic crisis.

INTRODUCTION

The outbreak of the COVID-19 pandemic has changed the world in a significant way. In addition to increasing health problems, there were social and economic problems. A crisis is a difficult experience and currently, almost no organization (enterprise, corporation) can protect itself from the crisis related to COVID-19. However, with the right management strategies, organizations can reduce the likelihood of impact or transform their processes and structures in such a way as to reduce financial and human losses. It is important for many companies and industries not to lose the fight against the pandemic and not to be excluded from the market. This problem concerns many countries, including Poland, because,

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in the first quarter of 2021, 70.2 thousand jobs were liquidated, mainly in the private sector (*Central Statistical Office, Poland, 2021*).

Initially, the discussion of pandemic impacts focused on the short-term effects of mitigating and containing the pandemic (Correia et al., 2020). However, recent projections by statisticians modeling the development of the pandemic and the number of illnesses associated with the Delta variant show that we still have not won against the virus. Therefore, today, organizations must change their strategy to not only overcome this difficult time but at the same time prepare for the pandemic to continue, because no one can say with certainty how the pandemic will continue. The nature and extent of the coronavirus, as well as its new mutations, imply changes not only on a macroeconomic scale but especially on a microeconomic scale. The manifestation of this is an epidemic crisis in an organization, which affects its overall financial and market situation. For companies - regardless of their size - this means a change in the strategy of operation and development. The purpose of this article is to present a model of proactive, reactive actions and duration strategy, which on the one hand are aimed at stopping the spread of the crisis, and on the other hand, at limiting its negative effects and preparing the organization for a further escalation of the pandemic (long-Covid-19) as a result of the emergence of new SARS virus variants.

THE CRISIS CAUSED BY THE COVID-19 PANDEMIC

The term “crisis” is an ambiguous concept and acquires a closer meaning only when the sphere to which it refers (political, social, economic, ecological, psychological, military, etc.) is defined, and its detailed content depends on what level and for what purposes it is formulated. Crisis as a phenomenon can be considered on different levels and in different aspects. In the Greek language from which it comes, the word κρίσις (krisis) has many meanings, i.e.: judgment, sentence, separation, distinction, choice, examination, disputation, result, end, conclusive moment, turning point, sudden change, period of breakthrough (A Greek-English Lexicon (1948, p. 996). Initially, the term was used in medicine in the sense of a sudden breakthrough, sudden overstimulation of the disease, manifested by a rapid decrease in fever and the disappearance of disease symptoms (*Dictionary of foreign words, 1971, p. 404*). The word “crisis” is specifically understood by the Chinese and Japanese, who write this word using two characters, the first of which means “danger,” “imminent, inevitable ruin,” while the second means “opportunity, possibility,” something like a perspective opening up in the face of the future. This interpretation of the term “crisis” combines something that is at the same time danger and an opportunity, a threat, and a new possibility for the future (Jacyniak and Płużek, 2006, p. 12).

In the study by Clarke (1995) the crisis consists of three elements: time pressure, the contingency of a fundamental threat and surprise, and the fact that it is the result of both the danger and the circumstances in which it occurs. This definition includes all characteristics of a crisis consistent with the common, almost intuitive understanding of this phenomenon. First, a value considered most important or at least very important is threatened. Second, the threat comes as a surprise. Hence, one does not always know how to behave. Third, it forces you to make an immediate decision, not allowing you to cool down and analyze the situation and evaluate the consequences of the decision that needs to be made.

According to Taleb (2009), the history of nations and societies does not develop gradually, evolutionarily, linearly, but from time to time by leaps and bounds. Black swans are more common than you might think. The problem is that people cannot predict and ignore them, even though the impact of these events on their lives is significant. Such a completely unexpected event that no one or almost no one

predicted in early 2020 is the outbreak of the coronavirus pandemic that began in China in December 2019 and then spread throughout the world. (Taleb 2008, p. 22).

A crisis cannot be predicted, especially its scope and effects, just as a revolution cannot be predicted (a revolution is also a crisis). This is evidenced by the fact that even the report on the main risks and major threats in the world, The Global Risk Report 2020, prepared by experts on behalf of the World Economic Forum, which also uses the results of surveys, does not include a Covid-19 pandemic (or any other pandemic, for that matter) in the top ten risks most likely to occur in 2020 (Global Risk Report, 2020). Thus, a pandemic was “*outside the realm of normal predictions*” (Taleb, 2007, p. 10).

ACTIONS OF THE ORGANIZATION IN THE CRISIS CAUSED BY THE COVID-19 PANDEMIC - LITERATURE RESEARCH

Crisis management is a process in which the danger of a crisis is anticipated, its symptoms are analyzed, undertakings are made to reduce the negative consequences of the crisis and its factors are used to continue the process of development of the organization. The crisis related to the Covid-19 pandemic led to the devaluation of existing strategies and development models adopted and implemented by organizations. After initial disbelief in the gravity of the situation, attempts were made to seek measures and remedies for the duration of the pandemic crisis. These attempts focused, on the one hand, on adapting existing development models, and, on the other hand, on developing new development models focused on functioning in a pandemic situation. These models look for strategic alternatives to support not only the survival of a difficult pandemic but also the long-term resilience and growth of the organization.

A review of the literature on the model of organizational development under conditions of pandemic crisis indicates that the Business Canvas Model enriched with new elements is most often recommended. Fitriasari (2020, pp. 53-62) proposes to enrich it with the so-called Business Resilience with three elements: product excellence, people behavior, and process reliability. Business resilience is supported by digital transformation. The process of digital transformation requires proper testing of the digital infrastructure. By using the right technology to make the system resilient, a company can achieve digital transformation and create digital resilience. Seetharaman (2020) also highlights the digitization of business models during the Covid-19 pandemic. He writes that industries that produce and deliver information products and services are doing well, while those that produce physical products, especially labor-intensive businesses, have been forced to minimize operations or temporarily close. To better explain this crisis, he proposes a development model based on three dimensions: the information intensity of the product or service; the information intensity of the process or value chain; the basic nature of the product or service.

The research study by Crick and Crick (2020, pp. 206-213) addressed one of the management instruments which is the implementation of coopetition strategy in the time of the Covid-19 crisis. Their research came to three conclusions:

- coopetition can be an effective marketing strategy between firms during a pandemic that can benefit the organizations involved in such partnerships (as well as their customers and other key stakeholders);
- collaboration is made up of cooperative and competitive forces, with decision-makers being careful about which competitors they work with, as the results can be detrimental;

- it is uncertain whether coopetition strategies will continue or be limited in the future after the Covid-19 outbreak is over.

The proposals outlined above for modifying organizational development models in the wake of the Covid-19 pandemic are cognitively interesting, but not comprehensive, focusing only on selected organizational management instruments and the skills or resources that entrepreneurs and organizations accumulate to resist or adapt to crisis events (Bullough *et al.*, 2014; Doern *et al.*, 2019; Korber and McNaughton, 2018).

A different proposition - aimed at startups - is recommended by Kuckertz *et al.* (2020), who points out that to manage a crisis, preparation is essential, and few startups were prepared for a crisis of Covid-19 pandemic magnitude. Overall, the specific characteristics of innovative startups should enable them to be better prepared to deal with a Covid-19 crisis than other types of firms. Innovation is a prerequisite for being resilient, as innovative firms tend to continuously and continuously anticipate and adapt to a wide range of crises (Hamel and Valikangas, 2003; Linnenluecke, 2017). The recommended key dynamic model is based on the assumption that business resilience is the basis for startup development in the context of the Covid-19 pandemic crisis. This is defined as business model adaptation or international restructuring. The choice of the pathway for shaping startup resilience depends on:

- from relational capabilities (goodwill of business partners; consultation with a business network; broker support);
- from developing financial capabilities (capital accumulation through internal means; capital accumulation through government support);
- from the aid (government and institutional support).

The utilization and development of startup resources depend on crisis adversities, which in the model are as follows:

- failure (lack of liquidity; the path to existence);
- non-development (objections to innovation and progress; factors that inhibit growth);
- pressure to adapt (disruption of the firm's internal infrastructure);
- pre-resilience to disasters (a priori resilience).

The presented model of crisis management does not provide a detailed analysis of the pandemic crisis, but it correctly diagnoses the effects or crises for a start-up (defects, lack of development, adaptation pressure, pre-resilience to disasters). This diagnosis allows us to recommend tools that affect the mitigation of crises in the organization, i.e.: expansion of financial possibilities, use of relational skills, use of public support funds. These three tools used in management are indicated as a way of gaining the resilience of the organization in the form of creating new business models or internal restructuring. The dynamics of the development of the COVID-19 pandemic, and in particular the emergence of new variants of the virus, imply the need for strategic actions aimed at stabilizing and maintaining the continuity of the organization in the crisis caused by the pandemic. Among the proposals of such activities dedicated to selected organizations and industries, the analysis of Albers and Rundshagen (2020). Analyzing 148 messages filtered from the daily aviation industry published over the course of several

Strategic Responses of the Organization to the COVID-19 Pandemic Crisis

months of the pandemic (January-July 2020), they identified four main activities of European airlines with a strategic dimension:

- reduction of expenses and reduction of overheads and assets (retrenchment). These measures appear to be effective in the short term. However, in the long run, they are no longer of that nature;
- increase in perseverance. Such activities allow the organization to maintain the status quo in the medium term;
- development of innovation. In practice, this means introducing new, innovative solutions in the organization of a technical, technological, and organizational nature that favor the strategic renewal of the organization;
- suspension or cessation (exit of the market) of the activities of the organization. These activities may be the result of a lack of profitability.

Collins-Kreiner and Ram (2020) analyzed three strategies and tactics recommend by the United Nations World Tourism Organization (UNWTO) for tourism organizations (and countries) during the crisis caused by the Covid-19 pandemic:

- managing the crisis and mitigating the impact;
- providing stimulus and accelerating recovery;
- preparing for tomorrow.

The first strategy of “crisis management and mitigation” covers various areas, including assistance in employment, finance, human capital, marketing, finance, and regulation. The actions recommended in this strategy include:

- incentivizing job retention, maintaining self-employment, and protecting the most vulnerable groups;
- supporting the liquidity of the organization;
- reviewing taxes, fees, levies, and regulations affecting transportation and tourism;
- integrating tourism into national, regional, and global economic crisis packages;
- promoting skills development, especially digital skills;
- creating crisis management mechanisms and strategies;
- ensuring broadly understood consumer protection.

The second strategy to “stimulate and accelerate recovery” consists of:

- providing financial incentives for the development of tourism activity;
- reviewing fees, taxes, levies, and regulations affecting travel and tourism;
- classifying tourism in national and regional remedial and aid programs;
- promoting new skills, including digital;
- facilitating travel planning and organization during a pandemic;
- environmental protection in stimulus and remedial packages;
- market analysis in the area of marketing to stimulate demand;
- investing in the partnership.

The third strategy referred to as “preparing for tomorrow”, consists of the following activities:

- preparing for the crisis, building resilience, and introducing tourism as an industry that receives government support
- investing in the development of human capital;
- strengthening tourism management at all levels;
- market diversification, diversification of products and services;
- introducing tourism to national aid programs;
- development of market analysis and digital transformation systems;
- transition to a circular economy and the adoption of sustainable development goals.

Zhao and Kim (2021) in the research study on the strategy of the global value chain of clothing and textiles during the Covid-19 pandemic present various strategic activities in the areas of product design and development, sourcing and production, as well as retail and wholesale. According to the authors, these activities are to lead to “new normality” understood as broad cooperation and coordination of enterprises operating in the clothing and textile industries. A key action is to accelerate the use of digital technologies and consolidate the industry and its small and medium-sized enterprises. In the area of product design and development, the following is proposed: product innovation; assortment planning; design minimalism. In the area of sourcing and production, it is recommended the diversification of sourcing strategies; risk management in trade and international exchange; flexible production plan. However, in the case of retail and wholesale sales, it is proposed to: respond to changes in consumer behavior; digitization of retail and wholesale distribution; provision of personal protective equipment.

The highlighted strategic activities allowed the authors to organize them into a conceptual model of practices and strategies implemented by the clothing and textile industry in response to Covid-19. The presented activities allow clothing organizations to move to the so-called new normal (standard), which includes: cross-functional cooperation and coordination; accelerating the use of digital technologies; industry consolidation.

Yawson in the study “Strategic elastic analysis of HRD research and practice post-pandemic COVID-19” recommends organizations use strategic elasticity analysis (SFA) as a tool to fight the crisis caused by Covid-19. Such analysis allows each organization to generate various strategic options, which in the context of the ongoing Covid-19 pandemic provides strategists and managers with alternative scenarios adequate to the dynamics of the epidemic. In opinion of Raynor (2007), SFA has four steps: anticipate; formulate; accumulate; operate. In Yawson’s view, these four steps enabled him to develop four scenarios for post-Covid-19 HRD theory, research, and practice. The four scenarios he developed and related HRD research topics are presented below:

- The scenario “Shifts at scale and the meaning of work” – designing for agility, focusing on impact and the growth of flexibility and its implications for workers; redefining talent as a result of the changing meaning and faces of careers; learning and developing for a lifetime – co-evolution and learning experiences in the era of new workspaces; deploying talent, mobilizing careers – experiences in new work platforms and complex projects; embracing modern workspaces and collaboration, new models of work and working (such as job sharing, and reduced workload arrangements from non-managerial to managerial employees; designing for sharing and security; prioritizing

Strategic Responses of the Organization to the COVID-19 Pandemic Crisis

digital transformation, increasing connectivity, digitalization and the impact on workers as well as jobs; unleashing automation, analytics, algorithms, and Artificial Intelligence.

- The scenario “Organizational Leadership and the Next Normal” - leading virtual teams; effective crisis leadership; leadership in uncertain times; wicked problems; sense-making; social Inclusion, diversity, and equity; leading the digital organization; leading educational institutions.
- The scenario “Contactless Commerce & Education” - digital transformation; contactless commerce and social exclusion; remote learning; the new learning organization; the psychodynamics of remote working; performance management of remote employees.
- The scenario “I am my Neighbours Keeper – Employee and Corporate Volunteerism” - HRD curriculum on volunteerism; managing volunteers in an organization; corporate social responsibility and employee volunteering; training and development of volunteers; integration of volunteers into the organization as a human resource; corporate volunteerism; motivations, barriers, and benefits associated with volunteering; managing the tensions between volunteers and paid staff; organizing volunteer involvement in the organization; volunteerism as an HRD function; community engagement.

Oblój et al. (2021) in the Report on the functioning of Polish enterprises during the pandemic identify the following activities:

- enterprises minimize all risks, adopting the attitude of “we’ll wait and see”;
- do not take new actions and do not implement new management practices apart from highly advanced digitization;
- do not try to revise the strategy and business model;
- freeze ongoing investment projects;
- focus on maximum cost reduction;
- focus on the care and safety of employees and the financial condition of the company enabling its survival; treating the market in a “mechanical” way - relations between suppliers and customers are realized through teleconferences and videoconferences, which has become an accepted norm; allocation of working time of individual employees) forward-looking operation towards a hybrid model that includes remote work (1-2 days on fire) with stationary work. This solution allows for a partial reduction of costs, increasing electricity while maintaining relational elements appropriate for stationary work.

The above-mentioned proposals for corporate responses to the COVID-19 crisis vary greatly. However, two groups are profiled among them. The first one identifies tools (models, processes, technologies) that can be helpful in the conditions of a permanent pandemic. The second group includes strategic and tactical activities dedicated to enterprises operating in various industries (tourism, aviation, clothing industry). The choice of tools or specific activities determines the resources available, as well as the intensity and dynamics of the pandemic.

ORGANIZATION STRATEGIES DURING A COVID-19 PANDEMIC

It is difficult to accept a single definition that could define the entire sequence of unambiguous meanings of the concept of strategy. Usually, however, certain characteristics are assumed that can be attributed to the concept of strategy or strategic decision (Steinmann, Schreyögg, 1998, pp. 111-112):

- strategies determine the areas of activity or domains of activity of an organization;
- strategies are correlated with competition, i.e. they determine the organization's action programmers in response to competitors;
- strategies are related to the situation and development of the environment, to opportunities and threats, they react actively, through a well-directed influence, to external changes and (or) their attempts;
- strategies are oriented on the resources of the organization, on their strengths and weaknesses, about their position to competitors;
- strategies reflect the attitudes, wishes, and value systems of specific decision-makers;
- strategies are oriented towards the whole activity, i.e. they aim at the overall orientation of the organization's activities towards strategic goals
- from a long-term point of view, strategies have great significance for the organization's assets and income and far-reaching consequences regarding the binding of resources;
- strategies are future-oriented, based on long-term expectations, relating to their competencies and the states of the environment;
- strategies may or may not be the result of a systematic planning process, strategies may also be a response to crises within the organization and adverse changes or crises in the organization's environment (e.g. COVID-19 pandemic).

Due to the nature of the strategy and its multidimensionality, the strategy relates to various levels of organization management. Whittington et al. (2020, p. 12) there are three levels of the strategy:

- corporate-level strategy - relates to the overall scope of the organization and how value is added to the companies within the organization;
- business-level strategy - answers the question: how individual organizations should compete in their specific market;
- functional strategies - refer to how the elements of the organization effectively deliver strategies at the corporate and business level in terms of resources, processes, and people; one of such functional strategies aimed at effective people management is the human resource management strategy.

In times of constant uncertainty and crises caused by the Covid-19 pandemic, the basic questions concern the formulation and implementation of strategies to ensure the survival and development of the organization. According to the authors, these strategies should be flexible, differentiated, and tailored to the management levels of the organization. Table 1 proposes a distinction of strategies for different organizations in a pandemic crisis.

Strategic Responses of the Organization to the COVID-19 Pandemic Crisis

Table 1. Strategic responses of the organization to the Covid-19 pandemic crisis

Management levels in the organization	Strategic challenge	Strategic response
Corporate level/ Top Management	Existence/ Survival	- Resilience strategy
Business level/ Strategic Business Unit (SBU)	Competitive advantage	- Long-duration strategy
Functional level/ e.g. Human Resources (HR) strategy	Employee health	- Development of dynamic capabilities and competences

Source: own study.

Resilience strategy is the ability to absorb changes that ensure the existence and survival of the organization. The basis of the existence of each organization is a specific business concept, based on interrelated elements: market segment (customers); customer needs, and technology by which customer needs are met. A synthetic approach to this concept is called the mission of the organization. The organization, unlike most living organisms, which have certain inborn survival mechanisms (e.g. instinct), must generate similar methods of survival. One of them is self-awareness expressed in core competencies (Moszkowicz, 2005, p. 100). The resilience strategy should be developed by the top management of the organization. This strategy should answer the question of what the concept of business should be in the conditions of an ongoing and dynamically developing pandemic.

At the business level, the organization should prepare different and flexible strategies. These strategies should answer the question: how to compete? how to win in the market competition? Depending on the pandemic situation (short-Covid19 or long-Covid19), three strategic responses can be distinguished: long-duration strategy, proactive action, reactive action.

At the functional level of the organization, so-called functional strategies are developed concerning the products or services offered by the organization (production strategy), their financing (financial strategy), the optimal organizational structure (organizational strategy), sales and promotion (marketing strategy) and human resources (human resources strategy). These strategies aim to mobilize the resources at the disposal of the organization to enable it to implement resilience and long-duration strategies. In the opinion of the authors, these strategies must be coherent, o allow the organization to function in a pandemic crisis.

Resilience Strategy

In the opinion of Dereń and Skonieczny (2021, p. 44), the basic activity of the organization in the conditions of the crisis caused by Covid-19 is the diagnosis and assessment of the crisis by identifying its main symptoms. They define a crisis in the organization in the form of a pyramid, in which the following levels can be distinguished:

- disorganization (lack of information, information chaos);
- uncertainty (lack of knowledge, anxiety about the future, risk of decisions);
- disturbances (violation of the established order, structural and process balance);
- heal (fear and danger of loss of health and property);
- breakdown (loss of life, loss of existence).

These five levels of crisis require strategic action to survive the organization, prevent its liquidation, and ultimately achieve organizational resilience. Such actions can only be taken by an organization that has the capacity to exist.

The prerequisite for the survival of the organization is the actions taken by it in a crisis situation, i.e. in a state that is the result of the formation of certain unfavorable phenomena in time, which gives rise to a direct threat to the existence of the organization. These actions at the same time condition the organization to acquire organizational resilience.

Organizational resilience is defined in many ways, for example as an ability, ability, trait, outcome, process, behavior, strategy or approach, type of outcomes, or a combination of these. This conclusion was reached by Hillmann and Guenter (2021, pp. 1-26), who analyzed dozens of scientific articles on organizational resilience. Based on this analysis, they developed a conceptual integrative model of organizational resilience, in which they distinguished (Hillmann and Guenther, 2021, p. 26):

- resilient behavior – acceptance/ facing down reality; conquering denial; avoidance; embracing paradox;
- resilience resources – relational; emotional; cognitive; structural;
- resilience capabilities – anticipation; sensemaking;
- resilient response – maintaining of functions (resistance); time of recovery; resource access.

In this model, resilient behavior, resilience resources and resilience capabilities are components of resilient response, which affects organizational growth (renewal; adaptation; learning).

In the opinion of authors, organizational resilience can be defined as a corporate strategy (or systemic business concept) developed by top management. This strategy uses the strengths or weaknesses of the organization's resources (human, physical, reputational, organizational, financial, intellectual, technological) to create strategic activities of the organization in response to sudden changes, disruptions and threats appearing in the environment. The main goal of organizational resilience is not only to ensure security and the ability to quickly adapt to a crisis caused by Covid-19, but most importantly to function in conditions of a permanent pandemic. The dynamics, volatility, complexity, unpredictability, permanence, and destructive and real nature of the pandemic, determine the conditions of functioning of organizations and leads to significant changes in their management. In this situation, the ability to manage a crisis and to take several actions falling within the crisis management process is of key importance.

The management sciences take the organization as an entity so obviously that they do not deal in depth with the conditions that must be met for the organization (as a real system) to exist. Meanwhile, like any real system, an organization must contain certain (interrelated) components. The basis for the existence of any organization is a certain management concept, based on mutually compatible elements: the type, nature, and type of customers (market segment), the satisfaction of customer needs, and the technology that enables the implementation of the adopted functions. Therefore, when talking about the organization, it is necessary to distinguish the concepts: existence, survival, and acquisition of organizational resilience. This has its profound justification, especially in the conditions of the permanent pandemic crisis currently being experienced. Its dynamics, which manifests itself in the form of new variants of COVID-19 (Alpha - the so-called British variant, Beta - the so-called African variant, Delta - the so-called Indian variant, Gamma - the so-called Brazilian variant, Omicron), brings to the forefront the problem of survival of the organization. Unlike most living organisms, which have certain survival mechanisms encoded into them (including the instinct for self-preservation), an organization has yet to

Strategic Responses of the Organization to the COVID-19 Pandemic Crisis

generate certain ways of surviving. From the point of view of organization management, these are goals (mission), structure, processes, and people. The condition for the survival of the organization in crisis, (that is, in a state that is the result of the formation of certain unfavorable phenomena over time, which gives rise to an immediate threat to the existence of the organization) is to take action to acquire organizational resilience. Organizational resilience is the ability to recognize sudden changes, disruptions, and threats and respond to them by taking them into account in strategic and operational activities. The main goal of organizational resilience is not only to ensure security and the ability to quickly adapt to a crisis caused by Covid-19, but most importantly to function in a permanent pandemic. The dynamics, volatility, complexity, unpredictability, permanence, and destructive and real nature of the pandemic, determine the conditions of functioning of organizations and leads to significant changes in their management. In this situation, the ability to manage the organization in a crisis and to take actions that fall within the crisis management process is of key importance.

Managing an organization during a permanent pandemic is a process aimed at preventing the escalation of the resulting crisis, reducing its impact on resources and values, and taking control of its course, as well as minimizing losses, and building a state of “new normal” in an organization (see Figure 1).

For organizations to survive the period of uncertainty and turbulence associated with the Covid19 pandemic requires changes in long-term strategies. These changes should include the following:

- analysis of the current operating strategy and adjustment of the business model to the new reality;
- prioritization of goals and tasks;
- building a resilient asset portfolio in the organization
- securing funds to pay off current liabilities;
- review of costs and limiting them to the necessary minimum (savings on renting an office or operating fees, resignation from expensive training, occasional allowances for employees, etc.)
- managing purchasing processes so as not to freeze too much money in goods, but rather to eliminate those that are lagging;
- negotiations with creditors regarding the extension of repayment and the number of installments,
- reduction of wages and working hours;
- employment reduction - rational and based on financial calculations.

Figure 1. The organization and its strategies in the conditions of a pandemic crisis

Source: own study.



The current COVID-19 situation is a challenge for modern organizations. It turns out that the so far understood organizational resilience only partially allows organizations to adapt to the ultra-dynamically changing situation. The turbulences of the external and internal environment of the organization also changed their character. So far in the literature, there has been talk of significant turbulence, incl. environmental ultra-turbulence (Luttwak, 2000); unprecedented in terms of dynamics and scale (Fliegier, 2020, p. 42). In this situation (called by the authors hyper-turbulence), a new management philosophy should be formulated, which should be based on the dominance of the question: “what if this happens?” Such an approach will allow managers to question the adopted order, generate new ideas and situations, often unlikely in a given reality, as well as prepare various strategic scenarios, strategic plans and tactical actions in the event of their occurrence.

Long-Duration Strategy

Proactive and reactive actions are a kind of “adaptation” to the new situation, implementation of solutions ensuring safety at work, and stabilizing the financial situation of enterprises. However, it is necessary to think strategically, about the future based on knowledge, about the permanent duration of the epidemic. It is a difficult situation because still managers must strive to regain influence on the surrounding reality, and at the same time shape and implement new rules of the game and fight for the future of the company and people who create it. The authors of this paper adopt for it the name of duration strategy. It should be treated in terms of opportunities and possibilities of a new opening, a “new normal”. The actions taken must have a strong orientation towards the future, building intentions and plans that are not only a response to the permanent pandemic but also go beyond the “here and now”. It is also a time of experimenting within the company and testing new ideas.

Table 2 showed the long-duration strategy and its relationship to the proactive and reactive activities of the organization. The term duration is most often defined as ‘continuance or persistence in time’ or ‘a period of existence or persistence’. This category should be used to refer to the long duration of the Covid-19 pandemic called ‘long-Covid-19’. The term is borrowed from the medical literature and refers to the phenomenon of prolonged symptoms or various complaints reported by patients following infection with SARS-CoV-2. (Mandal et al., 2020). Its opposite is ‘short-Covid-19’ defined as a period of activity of an organization lasting in a relatively short period of time.

Table 2. Organizational strategies during the Covid-19 pandemic

	Organization strategy		
Duration of Covid-19 Pandemic	Short-Covid-19	Proactive actions	Reactive actions
	Long-Covid-19	Long-duration strategy	

Source: own study.

The long-duration strategy is based on the following activities:

1. Conducting ongoing what-if sessions to identify new areas of potential organizational change;
2. Generating a strategy for dealing with identified changes/difficulties;
3. Preparing organizational and management resources necessary for practical implementation of the adopted strategies;
4. Conducting organizational simulations in selected areas of organizational functioning to practically confirm the feasibility of the planned strategies;
5. Optimizing the strategy based on feedback resulting from points 1-4.
6. Formalizing accepted solutions to create an organizational knowledge base.

Strategy is the art of optimal decision-making and recognition of opportunities and threats to the development of the company, identification of risks, as well as anticipation of effects through appropriate selection of tools to achieve the objectives. The long-duration strategy recommended by the authors

is a combination of actions that will create a positive synergistic effect and thus enable the organization to stay on the market in conditions of a permanent Covid-19 pandemic.

In practice, implementing the long-duration strategy may include the following activities:

- planning preventative actions throughout the operations and supply chain;
- ensuring communication with key customers and stakeholders;
- reviewing the impact of changing with developments in the sector in which the organization operates;
- create an agile and flexible supply chain;
- implement digital and process automation to mitigate the impact of disruption;
- change strategy implementation techniques;
- develop and implement improved management practices risks.

The next stage is the preparation of resources (including human resources) for the implementation of the business strategy and conducting implementation simulations along with drawing appropriate conclusions from the received feedback. The last stage is formalizing the adopted solutions (Fliegier, 2020, p. 44).

Dynamic Activities in the Area of Human Resources Management

During a pandemic, HR (personnel) strategy is not a stand-alone HR action plan but should be consistent with resilience and long duration strategy. HR strategy must be built on the dynamic capabilities and competencies of the organization. Teece et al. (1997, pp. 509-533) define dynamic capabilities as an organization's ability to integrate, build, and reconfigure internal and external competences to rapidly changing environment. Developing these capabilities and competencies the organization can minimize the negative effects of a pandemic crisis. Adapting dynamic capabilities approach to functional level in the organization can help managers can use the organization's ability to build new innovations, and entrepreneurial attitude among employees.

Employees have been, are, and will continue to be the most important link in an organization, yet paradoxically in the age of pandemics, they have become the most fragile of all resources. In one moment, it may turn out that people on whose decisions and actions the organization has based its activities are excluded from its functioning for some time. Therefore, employers during a pandemic have had to change their perceptions of the world and the day-to-day solutions used in their work to enable their organizations to function continuously and uninterruptedly despite adversity and unfavorable circumstances. Human resource management processes should be implemented in each functional area (production, services, marketing, finance, R&D) in order to ensure the necessary supply of human capital and competencies to achieve the strategic goals and objectives of the organization.

In practice, the implementation of HR strategy may include the following activities:

- coronavirus protection for employees, medical and psychological support;
- appropriate communication reminding that all changes and requirements, including sanitary-epidemiological (e.g. vaccinations), are necessary for the operation of the company and the protection of employees and their families;

Strategic Responses of the Organization to the COVID-19 Pandemic Crisis

- transparent communication - instilling an atmosphere of mutual trust and a sense of safety, regular staff meetings with management and more frequent team discussions, meetings with psychotherapists and webinars that are counseling in coping with anxiety;
- increasing the decision-making freedom of employees, developing skills, and the ability to function independently in a long period in isolation, efficient;
- management of remote work and ensuring the implementation of the established objectives;
- increasing the scope of use of technical solutions in the remote system, developing and securing the technical infrastructure that allows for the remote organization of work;
- separating areas of responsibility of employees in the remote working system;
- ensuring the interchangeability of organizational roles in the event of exclusion of key employees from the functioning of the organization even for a longer period (e.g., due to quarantine or illness);
- developing forms and ways to maintain a positive work environment for employees;
- creating bonds with the completely remote crew (building social capital in the new conditions);
- managers' actions based on goals, digital transformation, and employees;
- developing the navigation function as a dominant managerial skill to ensure agility and continuity of operations.

CONCLUSION

How can organizations prepare for the persistent Covid-19 pandemic as it manifests itself with new virus variants? The answer to this question is the recommended three strategies: a resilience strategy, a long-duration strategy, and a strategy based on a dynamic capability strategy. Those strategies include a set of actions building different actions and scenarios for future events to find ways to adapt to them in the event of new crises. Until now, there were no such requirements in the management of organizations, but the Covid-19 pandemic and its nature make people think and implement new approaches in the daily functioning of the organization. Organizations must work for survival, resilience, and flexibility to use more methods to build strategic environmental analysis than ever before.

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KEY TERMS AND DEFINITIONS

Crisis: The term comes from the Greek (κρίσις) “crisis” and means, in a general sense, a choice, a decision, a struggle, a struggle in which it is necessary to act under time pressure.

Dynamic Capabilities: Reflects an organization's ability to develop new and innovative employee competency configurations.

Long-Duration Strategy: Is a combination of the activities of the organization that will create a positive synergistic effect and thus enables it to remain on the market in the conditions of the permanent COVID-19 pandemic.

New Normal: The state of the organization's functioning in conditions of permanent crisis threat caused by the COVID-19 pandemic.

Organizational Resilience: It is the organization's ability to adapt to hyper-turbulent changes in its environment.

Resilience Strategy: Is the ability to absorb changes that ensure the existence and survival of the organization.

Strategy: Is a coherent concept of action based on a few keys and complementary choices that allow the company to seize opportunities, build a competitive advantage, and achieve good results.

Proactive Actions: This is the choice of actions by the organization to prevent the negative effects of the COVID-19 pandemic.

Reactive Actions: This is the choice of actions by the organization to minimize the negative effects of the COVID-19 pandemic.

Chapter 3

Dealing With Pandemic Grief in Organizations: A Human Resources (HR) Challenge

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ABSTRACT

This chapter analyzes grief in organizations as a result of the COVID-19 pandemic and how it has become a challenge that human resources professionals need to include in their future strategies. The chapter provides a literature review surrounding the concepts of grief and loss, especially pandemic-related grief and grief in the workplace. Additionally, it includes the most relevant scales used to evaluate grief and bereavement related to different types of loss. Best practices are included to present a general overview of how grief and loss can be dealt with in a way in which the positive emotions can be used to outcast lasting negative emotions. A modified version of the pandemic grief scale was applied in a private business school in Mexico to analyze the impact of grief in the workplace during the health crisis.

INTRODUCTION

Grief in the workplace has become the elephant in the room (Rigstaff, 2020); it is an issue that tends to be overlooked because it constitutes an uncomfortable subject that is sometimes stigmatized. Grief

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has been prevalent in the workplace and has seen an upsurge due to COVID-19; however, it is rarely addressed. Past research, particularly in the field of psychology, focused on the negative emotions associated with grief, such as depression, anxiety, and anger; more recently, positive emotions have taken center stage, becoming more prevalent than negative emotions (Wortman in Sander & Scherer, 2009). The pandemic has shed light on the gap in bereavement support, leaving people scared to share or ask for help during complex life events at work, as there has traditionally been a lack of discussion about grief in the workplace (Linch, 2021).

Even before the pandemic started, grief was a normal part of the workplace (Whitlock, 2020) but had not been adequately assessed nor tackled (Olbricht, 2020). In order to become sustainable in the long run and care for the well-being of their employees, organizations need to reflect a compassionate and grief-informed workplace culture and honor the reality of employees' grief (Davies, 2021).

The COVID-19 pandemic changed how organizations functioned. It is not just an employee grieving; it is the entire employee roster and other stakeholders (Keefauver, 2021) that interact with organizations. The situation has become so prevalent that it has been suggested that the most significant risk in business right now is grief (Aspan, 2020), and that grief is the latest challenge for employers and human resources management (HRM) (Place, 2020). Grief experienced in the personal life has a spillover into the workplace, affecting work behaviors and outcomes (Gilbert & Kelloway, 2021).

Employee productivity is negatively impacted by continuous grief and loss (Olbricht, 2020), costing millions of hours of productivity (Davies, 2021). In the US alone, before the pandemic, grief and trauma caused losses of over 100 billion dollars in 2003 due to increased absenteeism and presenteeism, increased errors in judgment, decreased participation, more employee turnover, efficiency problems, poor personal relationships, and a high accident rate (Norton, 2020). It has been estimated that losses due to grief have reached a quarter trillion dollars in the US (Rigstaff, 2020).

Pandemic grief has been compared to war against an invisible enemy that attacks anyone without warning (Hollinger, 2020). It is based on unmitigated grief, immeasurable loss, and a prolonged grief experience (Petry, Hughes & Galanos, 2021). Employees are grieving different kinds of losses all at once (Caron, 2021). Some people are grieving multiple, compounding, and catastrophic stressors and losses (Keefauver, 2020; Aspan, 2020). People lost the way they used to live; there is increased fear, stress, frustration, impatience, uncertainty about work, and loss of life in general (Hollinger, 2020). Loss of routine and sense of safety are common, along with human loss, financial devastation, caregiver fatigue (Keefauver, 2020), loss of predictability, connections, and even loss of daily norms (CIGNA, 2020). Every loss needs to be acknowledged and addressed to be managed accordingly (Caron, 2021).

Pandemic-derived grief has an important impact on employee well-being. After a significant loss, nothing is ever the same. Therefore, it is essential to manage groups and teams following the death of an employee (Peticca-Harris, 2018), an employer, a colleague, or a family member or friend, and understand and care when the employees are bereaved.

Remote working conditions may have made grieving worse. Much grief will remain frozen because many people did not have enough support or enough ritual to grieve (Petriglieri, 2020). There might have been an increase or decrease in the levels of work, people have switched to working from home under complex safety procedures, and they might have also been coping with isolation and cut off from their usual networks of support (CRUSE, 2021).

Pandemic grief, though widespread, has accumulated unevenly. COVID-19 grief is different from other types of grief; it is disenfranchised (Lathrop, 2017), and people cannot express it through the usual channels (Doheny, 2021). Coming back to the office might make employees realize the loss differently,

therefore the need for grief sensitivity and grief coaching (Market Watch, 2021) to bring the mourning process forward in the organizational culture (McKinsey, 2020). The topics of death and grief should become part of the conversation at the office, and leaders need to get comfortable with the uncomfortable (Linch, 2021). The workplace can be one of those spaces that help with mourning because it can offer a sense of stability and predictability, comfort and respite (Petriglieri, 2020).

In this context, this chapter presents a general introduction into the subject of grief, diving deeper into pandemic grief and organizational grief to provide an understanding of its effects in the workplace and how to create the basis for managing it. Best practices are introduced, and a brief empirical study is included to show an example of a private university in Mexico that, from a Human Resources perspective, has carried out efforts to measure individual and generalized organizational grief derived from the COVID-19 pandemic.

BACKGROUND

Grief is intuitive (Linney, 1999); it is complex, and although normal and natural (Wolfelt, 2020), it is shaped by different beliefs and social practices (Wortman in Sander & Scherer, 2009). Grief is an element of social differentiation of personal and private intimacy (Winkel, 2001), yet it has been stigmatized in society (Morris, 2021). It is a human experience that everyone can relate to, but that can change the trajectory of a life (Harris, 2005).

Grief goes beyond death. It includes deep or intense sorrow that causes distress or suffering (Wilkes, 1979). Grief is a name given to an emotional response of loss and is a process rather than a single state; it is not a weakness but a necessity (Igarashi, 2021). Although it is primarily an emotional reaction, it also includes different psychological and physical reactions, which is why grief manifestations vary (Wortman, in Sander & Scherer, 2009). It comprises everything that people feel inside when their attachments are threatened, harmed, or severed (Wolfelt, 2020).

Loss and grief are present in all cultures since everyone has lost someone or something in their lifetime, and there are many and varied sources of grief and multiple triggers (Vickers, 2009). Bereavement, for example, is the loss of a loved one through death (Wortman, in Sander & Scherer, 2009). Bereavement also can be defined as depriving someone of something or someone valued, primarily through death (Vickers, 2009). As such, grief and mourning are frameworks to get through a moment of loss (Epstein, 2019).

Grief is a necessary state of transition in processing losses; in fact, people feel better when they mourn (Wolfelt, 2020), and it does not necessarily decrease over time since not every person grieves the same way (Morris, 2021). Mourning was constructed as the specific emotion of sorrow and grief for the first time in the 19th century (Winkel, 2001), but that does not mean it was not felt or practiced before, as there is no wrong or right way to grieve (Rath & Veland, 2021).

People from different backgrounds can grieve differently, as things like culture, religion, and ethnicity can influence a person's approach to grief; however, this does not mean that all people from the same background grieve in the same way either, or that there are not similarities across diverse groups of people (Walter, 2010). Much of the information involving cross-cultural comparisons concerning grief comes from data collected by anthropologists, and a lot of what is known about it is based on inferences that have been made by studying public displays of mourning behavior rather than private emotional reactions (Strobe & Schut, 1998).

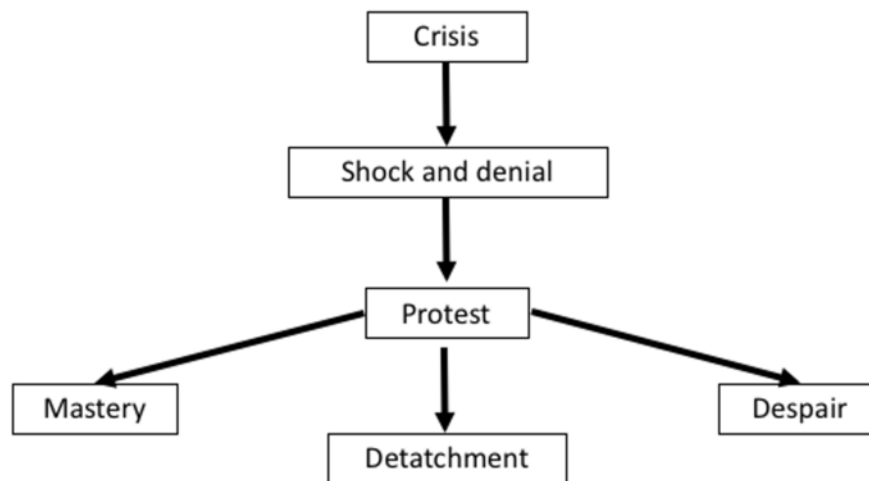
An example of the differences in the way people grieve can be explained through the characteristics of society. More individualistic societies, like the United States, tend to see grief as a journey where the person detaches themselves from the object of their grief and mourning and achieves closure; while in collectivist societies, mourning entails the fulfillment of responsibilities to others (Walter, 2010). In terms of similarities, emotional, behavioral, physical, and cognitive manifestations have been studied. They include feelings of depression, anxiety, guilt, anger, and hostility; behaviors such as crying and social withdrawal; physical symptoms such as trouble sleeping, loss of appetite, and exhaustion; and cognitive consequences related to lowered self-esteem, problems with memory and concentration, and hopelessness (Strobe & Schut, 1998).

In terms of models and theories developed, most approaches to the study of grief have been introduced by western lines of thought (Walter, 2010). One of the most well-known frameworks on the subject is that of Kübler-Ross, which divides grief into five stages: denial, anger, bargaining, depression, and acceptance (Kübler-Ross & Kessler, 2005); although it has mainly been used to explore loss in the form of death of a loved one, it also has applications in change management as it helps understand the feelings of employees while facing important changes in the workplace.

An interesting grief theory different from most is that of Lucas (1987, in Harris, 2015). This theory is based on the premise that effective helping depends on three factors: reality, empathy, and support. Lucas defined grief as the product and process involved in losses of all kinds, not just death, and as a response and adaptation to those losses through life.

Figure 1. Lucas (1987) grief model

Source: Harris, 2015



In Lucas's model, shock and denial reflect a sense that the situation is not real, that it must be a nightmare, and that the sense of normalcy will be restored eventually; protest is the central axis of the theory. It claims that permission to protest facilitates effective mourning; it might be represented as anger for the feeling of being robbed of something, rebelling against the loss, or expressing anger about the death.

Dealing With Pandemic Grief in Organizations

In Lucas's (1987) view, it is protest that produces revolution rather than grief escalation. In fact, some people at the end of acute grief obtain better coping skills for life than they had before (Harris, 2015).

Considering that people can feel, manifest, and express grief differently, table 1 presents an overview of the different types of grief found in the literature.

Table 1. Types of grief

Type of grief	Description	Authors
Abbreviated grief	Grief that is short-lived but still is genuine.	Keller, 2021 Knight, 2021
Abnormal grief	Grief that progresses from an emotionally painful but normal experience to a disorder requiring additional evaluation and treatment.	Pasnau, Fawney & Fawney, 1987 Ringold, Lynn, & Glass, 2005.
Absent grief	When the signs of grief are not acknowledged. The inhibition or absence of typical expressions of grief, denial of feelings about the loss, no external signs of grieving.	Keller, 2021 Middleton, Raphael, Martinek, & Misso, 1993 Deutsch, 1937 Knight, 2021
Ambiguous grief	Also called living grief, it is sometimes misdiagnosed as depression or post-traumatic stress disorder.	Knight, 2021
Anticipatory grief	It comes before change happens or when change is about to happen; when we know that a change is coming and will be perceived as a loss.	Goncalves, 2017
Atypical grief	Grief that is sometimes unrecognized because it does not appear or shows symptoms of grief.	Dowling, Hubert, White, & Hollins, 2006 Jacobs & Douglas, 1979
Bounded grief	It can be used as a synonym with stifled grief, in which grief is denied its full course of mourning.	Vickers, 2005
Chronic grief	Leads to hopelessness and disbelief. People may never accept the loss, stay consumed with it for months or years, and act as though it just occurred.	Keller, 2021 Para, 2009
Collective grief	Grief is felt by a group, a community, society, or nation due to a natural disaster, death of a public figure, terrorist attacks, or war, among others.	Knight, 2021
Cumulative grief	The compounding emotional, physical, and spiritual responses to recurrent exposures to profound loss.	Lindberg, 2012
Delayed grief	Grief in which the emotions are postponed until a later time.	Knight, 2021
Disenfranchised grief	The experience of grieving a loss that is unacknowledged or unsupported on social systems. Ambiguous grief. Grief is not socially recognized. Considered one of the saddest forms of grief that leaves the griever feeling invalidated.	Petry, Huges & Galganos, 2021 Knight, 2021
Distorted grief	It appears when one or more grief reactions become wildly exaggerated. The griever becomes stuck on one stage of grief. Similar to exaggerated grief, where there is an intensification or worsening of grief symptoms.	Brown & Stoudemier, 1989 Para, 2009 Knight, 2021 Vazquez, 2021
Distributed grief	When grieving processes and patterns from several individuals are intertwined and can be regarded as one.	Ratcliffe & Byrne, 2020
Individual grief	An unprecedented type of grief that is personal and different. The unique process of the individual	Zisook & Shear, 2009
Inhibited grief	Conscious or unconscious holding in of one's feelings in order to prevent expression. This may cause a delay in starting the grief process and go further in that it often becomes a way of life for the survivor. Grief that is not openly displayed.	Bright, 1985 Knight, 2021

Continued on following page

Table 1. Continued

Type of grief	Description	Authors
Intensified grief	More profound and sharper grief. Grief that includes feeling overwhelmed, very sad, angry, guilty, or having feelings of hopelessness and helplessness that lasts longer and fails to diminish.	Lieberman & Jacobs, 1987
Maladaptive grief	Grief that encompasses post-loss thoughts and behaviors that are problematic, dysfunctional, dominating, or catastrophizing. Includes self-destructive behaviors that endanger a person's emotional, mental, and physical well-being following a death or loss due to trauma.	Reeves & Boersma 1990 Brenner, 2019
Masked grief	It becomes almost impossible to recognize that the symptoms or behaviors are connected to a loss. There are physical manifestations that impair normal activity, but the griever is unable to establish the link between physical problems, behavior, and grief.	Knight, 2021
Morbid grief	Also considered as abnormal grief. Grief with an exaggeration of the typical symptoms and a presence of deviant behaviors.	Sireling, Cohen & Marks, 1988 Parkes, 1965
Neurotic grief	Grief that is generally excessive and disproportionate in nature and protracted in duration; it is associated with profound feelings of irrational despair and hopelessness, often with loss of personal identity.	Wahl, 1970
Normal grief	A temporary state in which the intensity of grief will naturally dissipate over time.	Knight, 2020
Pathological grief	A deviation from the cultural norm in the time course or the intensity of specific or general symptoms of grief.	Stroebe, van den Bout & Schut, 1994
Prolonged grief	A particular mental health condition among disorders specifically associated with stress. Core symptoms include a persistent and pervasive longing for what was lost and persistent and pervasive preoccupation with what was lost.	Lieberman & Jacobs, 1987 World Health Organization (2018).
Traumatic grief	Grief in which tragedy is involved. It is triggered by sudden unexpected events.	Knight, 2021
Truncated grief	Grief stemming from unresolved duels and not being able to say goodbye.	Widdison & Salisbury, 1990 Turabian, 2020
Secondary grief	Grief stemming from preexisting losses.	Abyankar, 2021
Unmitigated grief	Grief that comes without traditional rituals.	Huller, 2019
Unresolved grief	Pervasive grief that remains for a very long time, and that can even intensify instead of diminishing.	Zisook & de Vaul, 1985 Dhanaraj & Khrieser, 2020
Unspeakable grief	Grief that contains guilt and is difficult to communicate or make public.	Moore, 2005

Source: Developed by the authors with the information cited in the table.

Additional variations of grief include complicated grief, which manifests itself as a prolonged grief experience that can last over six months following losses that are not considered normal life events and encompasses absent, delayed, or inhibited grief, distorted grief, and chronic grief; it can result in major depression, generalized anxiety, and post-traumatic stress disorder (Stroebe et al., 2007; Sanders, 1989; Bete, 1999; Bonanno & Kaltman, 2001, pp. 725-727). Dysfunctional grief is also a mix of some of the other types presented in table 1; it can be atypical, pathological, complicated, absent or lacking, abnormal, neurotic, and unresolved (Ryneerson, 1987; Bateman et al., 1992).

Furthermore, grief can be accompanied by additional feelings of loss; table 2 presents some of the most cited in the literature.

Table 2. Losses associated with grief that people do not talk about

Type of loss	Description	Authors
Loss of identity	Not knowing who one is, where one stands, or personal values.	Epstein, 2019 Dhanaraj & Khlerieser, 2020
Loss of safety	The lost sense of physical, emotional, and mental well-being.	Epstein, 2019
Loss of autonomy	The forfeiture of the ability to manage one's own life and affairs.	Epstein, 2019
Loss of dreams of expectations	Unfulfillment of personal goals.	Epstein, 2019
Loss of attachment	Feeling a lack of connections, bonds, and security,	Dhanaraj & Khlerieser, 2020
Loss of territory	Not having a sense of belonging.	Dhanaraj & Khlerieser, 2020
Loss of future	Loss of direction and the sense of positive outcomes and expectations,	Dhanaraj & Khlerieser, 2020
Loss of structure	Loss of the notion of one's role, importance, involvement, and value.	Dhanaraj & Khlerieser, 2020
Loss of meaning	Not understanding what the point in life is. Lack of meaning and purpose.	Dhanaraj & Khlerieser, 2020
Loss of control	Feeling overwhelmed, lack of control of situations and one's destiny.	Dhanaraj & Khlerieser, 2020

Source: Developed by the authors with the information cited in the table.

The different types of grief (presented in table 1) and the additional feelings of loss associated with grief (presented in table 2) relate to each other and the purpose of this chapter in the sense that both can have consequences on the individual, but also how people process and deal with those feelings in public settings like school, the workplace, and even in interactions with other people. Grieving people still have a life outside of that grief, which can be affected by the physical and emotional effects of their feelings of loss, impacting areas like productivity, sense of purpose, general well-being, job satisfaction, and future planning, among others.

MAIN FOCUS OF THE CHAPTER

This chapter aims to show the need to increase the understanding of the effects of grief in the workplace and how to manage it adequately from a human resources (HR) perspective. It will also help to acknowledge the grief that workers experience, identifying ways to contribute to their overall well-being through a collection of best practices from different organizations across the globe. The chapter includes an exhaustive literature review on grief in the workplace and diverse scales that have been developed to measure it. Empirical evidence about how pandemic grief has been evaluated in a private university in Puebla is also integrated.

Issues, Controversies, Problems

Pandemic-Related Grief

Every person in the world has experienced some kind of loss during the pandemic, from loss of freedom and a sense of normality to loss of family members and friends. Individuals across the globe are facing a variety of losses of people, resources, opportunities, control (Holmes et al., 2021), and even milestones that were missed (Burton, 2021); sometimes, certain losses can go unnoticed. Among the losses is the loss of rituals of bereavement. Rituals provide infrastructure and a platform to acknowledge reality. They include emotional and tangible support, but during the pandemic, numerous rituals have either disappeared, moved online, or have been held in person with a limited number of participants (Relias Media, 2021).

There are a variety of symptoms for grieving a loss, which include lack of energy, excess of activities, masking the pain using humor, withdrawing from friends and relatives, getting angry, blaming others, feeling isolated, and experiencing guilt (Masson, 2021). Grief has been called the second pandemic because of the mental health implications of COVID-19 and all the loss around it.

Collectively, we live in a time of profound tragedy (Burton, 2021) that might well last for years (Kelsal, 2021). It has been loss after loss, after loss (Morris, 2021). Losses and death numbers continue to rise, health workers are leaving their jobs due to fear of lack of support (Sinko, 2020), and bereavement after COVID deaths is distorted by enforced absences; dying in isolation is a traumatic experience for those dying and those experiencing the loss (Alter, 2021). Additionally, pandemic grief can be related to shared trauma, a notion that originated in 9/11 (Holmes et al., 2021).

Recent studies suggest that the full effect of pandemic grief will not be known for some time (Alter, 2021). Pandemic grief will change day to day and week to week as circumstances change (Wolfelt, 2020). Even when the pandemic fades, grief will linger (Morris, 2021). As the effects of pandemic grief are being felt worldwide, emphasis has been put on studying it. The Pandemic Grief Project is a center studying bereavement to determine how COVID-19 affects people's mental state and well-being across the globe through a simple five-item questionnaire (Lee, 2021). A study published in the New York Times stated that a grief crisis is coming and that from one person who dies from COVID-19, there are at least nine loved ones left behind to grieve (Nevidjon, 2021).

The sudden unexpected death of a loved one can be disturbing in ways that are unmatched by other stressful events because the survivors are confronted with challenges for which they are unprepared, and grief can also generate persistent thoughts and concerns about one's own mortality (Bartone & Ender, 1994). Sudden death may overwhelm survivors to a degree that they are not able to function at the level required for grief processing, therefore causing a delay in grief reactions (Clements, De Rainiri, Vigil & Denasutti, 2004), and people who were already bereaved for other reasons are suddenly faced with challenging grief experiences.

The world will be dealing with the pandemic's mental health fallout for four to five years (Kelsal, 2021). Humanity needs to come to terms with the new reality (Masson, 2021). However, in a way, the pandemic has united people because everyone was hurting, and it became easier to talk about grief (Devine, 2021). Under conditions of COVID-19, it is quite likely that our expectations of death, dying, and mourning will not be met, yet it reminds us of the incredible privilege that life is (Weingarten, Galván-Durán, D'Urso & Garcia, 2020).

During the health crisis, grief has been considered the epidemic within an epidemic; it impacts how people live and die, how they are curtailing normal expressions of grief and mourning (Petry, Hughes

& Galabnos, 2021). Grief during the pandemic has proven especially devastating and complex for many people already in mourning (Alter, 2021). Pandemic grief will have a bigger footprint than what can be thought of (Sinko, 2020). Grief is an important risk in organizations because it has not been adequately handled in the workplace before, and businesses did not fully recognize it before the pandemic (Aspan, 2020). Organizations need to be prepared for a long wave of post-traumatic stress disorders (PTSD) that will last some years (Aspan, 2020).

Defining Organizational Grief

People rarely consider grief as something that they need to worry about at work or while working, and it is frequently not recognized or acknowledged in the workplace; furthermore, people tend to underestimate the effects of a loss on working environments (Vickers, 2009). Grief changes organizations and institutions permanently. Grief is a much-neglected feature of being humans in organizations and is underrepresented in organizational studies (Vickers, 2009).

Employees spend around one-fourth of their lives in working environments; therefore, much of their mourning is done on the job, which could impact their ability to grieve adequately (Bento, 1994) and their ability to do the job properly. Studies have found that personal losses contribute to a lack of focus, interest, and energy that leads to a decrease in job performance (Manns & Little, 2011).

There are many reasons people will grieve at work, such as the end of a personal relationship, an illness, a death, the loss of a pet, among others. Additionally, in the workplace, grief can result from bullying, aggression, violence, uncivil acts, lost job or missed opportunities, changing shifts, excessive workloads, loss of a colleague or supervisor, among others (Vickers, 2009). In this sense, grief can be brought into an organization or be caused by it (Vickers, 2009). Nevertheless, Employees feel they do not receive the appropriate compassion and support they need from other members of the organization and that there is a gap in policies regarding this topic (Manns & Little, 2011).

In change management, organizational grief has its roots in the 1960s, in which studies of grief were based on the experience of personal loss, which included the death of a loved one and experiencing significant health problems. Organizational grief has since been used to design interventions and change processes to help employees accept change, especially since, for a long time, change had been considered as something bad that needed to be grieved because it entailed the loss of conditions previous to change. These ideas worked well when a change was an isolated event but started to become inadequate when change became prevalent in organizations. Cycles of change escalated, and employees no longer had time to grieve every change they faced throughout the day, the week, the month, or the year. Original organizational grief models based on change started to lose their appeal in a culture where change became constant and needed to be embraced (Welbourne, 2014).

Increasing Understanding of Grief in the Workplace

In the workplace, grief can be understood in multiple ways, for instance, grieving the loss of a job and even organizational death. In any case in which change is not asked for, grief will appear. It can include mergers, acquisitions, downsizing, and changes in workloads. All things out of employees' control can make them experience grief. Even if a change is not life-threatening, people tend to get stuck in a state of anger or depression (Linney, 1999).

It is a fact of life that most employees will experience the death of a family member or a loved one in their work lives, yet it seems that there is a lack of studies that analyze how bereavement impacts the workplace (Wilson, Punjani, Song, & Low, 2021). The application of theories regarding grief to the workplace has been slow (Machin, 1998). A study has determined that people have felt grief multiple times in their lives with a median of five times (Wilson, MacLeod, & Houttekier, 2016), and the time frame for grief recovery has been established as approximately two years (Zhang et al., 2006).

When a colleague dies, or someone in the workplace is grieving a death, there is an impact on the workplace (Australian Center for Grief and Bereavement, 2015). However, there is a lack of information about the impact on careers and the workplace because few empirical studies have been conducted (Wilson et al., 2021). Sometimes, grief in others goes unnoticed at work, affecting performance (Vickers, 2009). Before the pandemic, it had been estimated that the cost of lost productivity due to employee burnout and stress was between 265 and 300 billion a year in health care costs, and almost a third of that was attributable to grief (Moberly, 2021). Additionally, grief can go beyond burnout, sometimes resulting in vacancies that need to be filled (Bartone & Ender, 1994).

Organizations need to start talking about grief out loud for the millions of grieving people (Rath & Beland, 2021). In organizations, grief is not a new process, but it needs to be approached in a new way (Rath & Beland, 2021), as workforce well-being should be a business priority (McCain & Sen, 2021). In this sense, the workplace can be a space that helps with mourning because it offers a sense of stability (Petriglieri, 2020). In an era of constant and rapid change, in which personal and professional lives merge more than ever, people need to be helped to go through the grieving process at work (Linney, 1999).

Measuring and Managing Pandemic Grief

In order to apply a scale to measure and later manage grief in organizational settings, specifically in the case of a private university in Puebla, Mexico, diverse scales that contemplate grief as their area of analysis were identified and assessed to see if they could be adapted to fit the purpose of the study. Table 3 shows some of the most common scales developed to measure or understand grief.

Dealing With Pandemic Grief in Organizations

Table 3. Different scales to measure grief

Scale	Description	Number of items	Score	Author
Inventory of Complicated Grief (ICG)	Items describe an emotional, cognitive, or behavioral state linked to complicated grief.	19	5-point Likert scale	Prigerson, Maciejewski, Reynolds, Bierhals, Newsome, Fasiczka, Frank, Doman & Miller, 1995
Texas Revised Inventory of Grief (TRIG)	Measures the extent of unresolved grief in response to the loss of a family member.	7	5-point Likert scale	Faschingbauer, Zisook & de Vaul, 1987
Grief Experience Inventory	Multidimensional measure of grief that applies to both death and non-death loss or bereavement.	135	True or false questions.	Sanders, Mauger & Strong, 1985
Pandemic Grief Scale (PGS)	Screens dysfunctional grief due to a COVID-19 loss.	5	5-point Likert scale	Lee, Neimeyer & Breen 2021
Grief Measurement Scale	Analyzes the severity, time course, and nature of the psychological distress associated with a loss or threatened loss.	38	4-point Likert scale	Jacobs, Kasl, & Ostfeld, 1986
Bereavement Item Scale	Evaluates people's experience in relation to the recent loss of a loved one.	17	4-point Likert scale	Burnett, Middleton, Raphael & Martinek, 1997
Hogan Grief Reaction Checklist (HGRC)	Multidimensional scale to measure the normal process of bereavement.	61	5-point Likert scale	Hogan, Greenfield & Schmidt, 2001
Grief Resolution Index	It evaluates a person's success in coming to terms with the loss.	7	5-point Likert scale	Remondet & Hansson, 1986
Anticipatory grief Scale	Designed to assess the bereavement experience of women whose spouses have been diagnosed with dementia.	27	5-point Likert scale	Holm et al., 2019
Impact of Event Scale	Assess response to stressful life events, including the death of a loved one.	15	Two subscales 4 points	Horowitz, Wilner & Alvarez, 1979
Adult Attitude to Grief Scale	Measures grief and loss symptoms based on overwhelmed, control, or resilience.	9	Three subscales	Holmes et al., 2021.

Source: Developed by the authors with the information cited in the table.

Analyzing Organizational Grief in a Private Business School

The scale that aligned best with the objectives of this study was the Pandemic Grief Scale developed by

Lee, Neimeyer, and Breen (2021). This scale has the benefits of being short, precise, and easy to answer. Nevertheless, it had to be adapted to focus more on losses derived from the pandemic and the feelings that they brought out in the employees to understand some of the main consequences of grief in the workplace. In this sense, the scale included eight questions, three of which were designed to understand the context or perspective from which respondents were coming from and required yes or no answers; the rest focused on the emotional consequences of loss and grief at work. The time frame analyzed in the scale was also extended to the last two months instead of two weeks because important changes had happened in that time frame, for instance, the move to hybrid working models and the progress towards full return.

The scale was implemented through google forms to be answered electronically. No personal data was collected to ensure confidentiality. The re-designed scale was first piloted in a group of 30 faculty members from different areas, obtaining a Cronbach alpha coefficient of .824. The scale was then applied to the 49 full-time staff and faculty members at a private business school.

The results show that nearly 46% of participants have lost a family member in their immediate family circle or secondary kinship, and almost 40% have lost a co-worker during the pandemic. These numbers stand out because of the loss involved. In the case of co-workers, there was one loss in the organization; therefore, all participants who answered positively related to that particular death because it was in the area where they worked or in connecting areas. The amount of death-related grief is enormous, especially since all the employees bring their personal grief and sorrow to work. Additionally, 77.1% of all participants have stated that they have suffered significant changes in their jobs due to the pandemic, which can certainly impact the sense of loss and grief.

It was revealed that, in the months previous to the study, more than a third of participants have not thought about leaving their job, and the same amount has thought about it sometimes. Almost a fifth of participants have thought about leaving their jobs frequently, and for very few, thinking about leaving their job is almost constant. Table 4 shows the results for the scale item regarding thoughts of resignation.

Table 4. For the item of the scale regarding thoughts of resignation

In the past few months, you have thought about leaving your job	Percentage
Never	38.85%
Sometimes	36.7%
Frequently	18.4%
Almost all the time	6.1%

Source: Developed by the authors, 2021.

Results also showed that more than half of the respondents have not felt like they were doing meaningless work. However, almost a third reported feeling like that sometimes, and a little over a sixth of respondents answered having those feelings frequently or almost all the time. Table 5. shows the results for this item on the scale.

Dealing With Pandemic Grief in Organizations

Table 5. Results for feelings of doing meaningless work

In the past few months, you have found your job meaningless.	Percentage
Never	51%
Sometimes	32.7%
Frequently	14.3%
Almost all the time	2%

Source: Developed by the authors, 2021.

In terms of finding things that matter at work, almost a third of respondents have never thought that nothing seems to matter in their jobs, while almost half have sometimes thought about it, nearly a fifth think about it frequently, and very few think about it almost daily. Table 6 shows the scale item results that evaluate the feeling of having things that matter at work.

Table 6. Results for the scale item that evaluates the feeling of having things that matter at work

In the past few months, you have thought that nothing seems to matter at work	Percentage
Never	28.6%
Sometimes	46.9%
Frequently	18.4%
Almost all the time	6.1%

Source: Developed by the authors, 2021.

When asked whether the participants found it difficult to remember positive memories about their jobs, less than half said that it had not happened in the two months previous to the study, more than a third said it sometimes happens, for almost a fifth of participants, this happens frequently, and for very few this happens almost always. Table 7. presents the results for the item that analyzes positive memories associated with the job.

Table 7. Results for the item that analyzes positive memories associated with the job

In the past few months, you have found it difficult to recall positive memories from your job	Percentage
Never	41.7%
Sometimes	39.6%
Frequently	16.7%
Almost always	2%

Source: Developed by the authors, 2021.

Finally, regarding a perceived loss of value of their job, more than a third said it has never happened, or it has happened sometimes, almost a fifth said they feel it frequently, and a few people said that it happens almost always. Table 8. shows the results for this scale item.

Table 8. Results about the perceived loss of value of the job

In the past few months, you have perceived a loss of value in your job	Percentage
Never	36.7%
Sometimes	38.8%
Frequently	16.3%
Almost always	8.2%

Source: Developed by the authors, 2021.

SOLUTIONS AND RECOMMENDATIONS

Dealing with Organizational Grief: Practices and Policies

Certain organizations, areas, or sectors are more used than others to deal with loss and grief and better understand how to deal with the challenges, and encourage healthy adjustments. The military is an excellent example of grief management. The military is used to responding to death on a large scale, especially in hostilities and disasters, and so is the health sector.

In the United States, the military has a casualty branch that develops, coordinates, and implements policies and procedures related to casualties. The established processes start by notifying the family of the deceased, recovering human remains with the utmost respect, transporting the human remains, recovering personal effects, funeral and insurance arrangements, memorial services, and more (Bartone & Ender, 1994). Of course, it is important to acknowledge that, in the military, loss is associated with a good cause and heroic acts and is full of honor, which does not happen in every context.

There is also important military knowledge on how to influence the course of adjustment or adaptation to loss (Bartone & Ender, 1994). According to Bartone & Ender (1994), the US Army casualty procedures provide assistance efforts because individual adjustment for a survivor is largely influenced by how an organization responds to death. If it is cold and uncaring, the response will be anger and grief. Grief will escalate along with frustration. On the contrary, when the organization deals with death with dignity, this helps ease the pain. Help reduces grief and facilitates healthy recovery. The potential of many military casualty practices is understanding how to cope with traumatic loss, helping others work through the traumatic event (Bartone & Ender, 1994).

Keeping employees healthy is the next great challenge for organizations (Vaissie, 2021), especially after the pandemic. Returning to work while grieving may be overwhelming for employees because small things can become reminders of the loss and bring about feelings of sadness (Keller, 2021).

Since 2017, several companies such as Airbnb, General Mills, and Facebook have expanded their bereavement policies (Place, 2020). Facebook installed a 20-day paid leave after an immediate family member's death and up to 10 days for extended family members (Binford, 2017). Master Card bolstered

their bereavement leave and grief support offerings, extending healthcare, financial wellness, and mental health benefits for grieving employees (Place, 2020).

In Germany, grief and grief counseling has been institutionalized for more than ten years. There is a new culture of death and mourning as a modern way of dealing with loss. Professionalization of mourning has resulted in the creation of numerous programs and organizations that often use rituals and creative and diverse strategies (Winkel, 2001).

In devising policies, it is critical to determine whether bereavement will be paid or unpaid, the maximum amount of time available per incident and employee, the types of relationships that qualify for leave, required notification procedures, and supporting documentation (Binford, 2017). “Strong time-off policies, sensitive managers, and open conversations also make a big difference for employees in times of mourning” (Petriglieri & Maitlis, 2019); however, those are rare in workplaces around the world.

The Rise of Grief Counseling

Most people can cope and come to terms with their loss without professional intervention (Stroebe & Stroebe 1991). Nevertheless, to a grieving person, support and therapy are like stitches, casts, and crutches to a physically wounded body (Harris, 2005). After natural losses, most people find support and are able to process their grief with their family, friends, and social network, but when the loss is seen as unnatural, people tend to search for professional help, and others attend grief and support groups based on meetings with other bereaved people to share their experiences (Dyregrov, Dyregrov & Johnsen, 2019).

Loss, in general, is a central idea in counseling and also in business consulting. The rise of grief counseling shows the importance of individual-based approaches to provide services to ease human distress (McLeod, 1988; Machin, 1998). Institutionalized grief work, grief therapy, grief guide, grief aid, and counseling are part of a multiplicity of services that result from a postmodern culture or grief (Winkel, 2001). It is important to give people tools to manage their own stress and grief, trying to bring rage and grief to sessions to create meaningful experiences with others that will help ease the pain (Weingarten et al., 2020).

The Role of HR in Managing Organizational Grief

Controlling grief has been seen as a way of self-discipline in which people would hide feelings of grief in public (Winkel, 2001). Loss has a negative impact on motivation, and grief at work is both stressful and exhausting (Keller, 2021). Additionally, some of the consequences of grief that can lead to financial losses for organizations are difficulty concentrating, errors in judgment or making important decisions, accidents, and injuries (Hazen, 2008).

In organizations, HR has an essential role in grief management (Barclay & Kang 2019) because it is a process that might take months. It is a place where employees in grief can turn to for needed resources. HR is responsible for the strategies involving human capital and needs to consider aspects such as grief in their policy design to promote healthier workplaces.

In this sense, organizations can develop bereavement policies that offer long-term support instead of just at the beginning of the grief process and ensure leaders are equipped to support bereaved employees through appropriate training. Implementing bereavement policies may lead to long-term positive effects in terms of employee commitment and engagement (Barclay & Kang 2019). Nevertheless, organizations

need to consider that everyone experiences grief differently, “so employers must recognize individual circumstances and be as flexible as possible” (Baska, 2021) when developing such policies.

Responsive leaders need to allow the mourning process into the organizational culture and modify their leadership accordingly (De Smet, 2020). Grief leadership is needed to model optimism for the future. Among the required leadership qualities for dealing with grief are awareness, vulnerability, empathy, and compassion (De Smet, 2020).

In an organizational setting, leaders should try to be present and support employees by helping to manage the boundary between the grieving member and the workplace; paying attention is crucial, and reaching out shows support and makes employees realize that the workplace cares (Petriglieri & Maitlis, 2019). Communication is crucial, as studies have found that many employees are unaware of their employer having a policy for bereavement or offering other types of support (Baska, 2021). Through HR and team leaders, organizations should be clear about the guidelines that are set in place for these types of situations.

FUTURE RESEARCH DIRECTIONS

Future research could analyze specific policies implemented worldwide to deal with grief in organizations, mainly due to the COVID-19 pandemic, including potential applications in relation to Human Resources Management and ever-changing workplace contexts. Empirical studies could also be conducted to understand why grief is still a taboo topic in the workplace and how people deal with it at home versus at work.

The brief study that was included in this chapter was conducted in a business school. Higher education institutions were among the economic sectors less hit by the pandemic because most jobs were kept as courses were moved online. Analyzing grief in other business schools would be interesting, especially in different regions in Mexico, as well as making comparisons with other sectors that were harder hit by the pandemic, such as hospitality and tourism.

Additionally, with a larger database, different correlations can be done between the frequency of certain perceptions or feelings, such as loss of value and having lost a family member or a co-worker. Further studies could also integrate factor analysis and demographic correlations to shed light on some of the specific manifestations and consequences of individual and organizational grief in the workplace.

CONCLUSION

A short scale used shows the amount of grief that a private business school in Mexico is being subjected to and how it has affected people’s perception of their job and the workplace in general. Recently, there was a loss of a staff member, and additionally, nearly half of all faculty and staff have lost a family member during the pandemic, which elevates the levels of personal and organizational grief in this particular case.

It is important to acknowledge that the grieving processes can vary from person to person. However, due to the pandemic, grief has become a constant, creating conditions that affect how members perceive different aspects of their lives, including work.

Sometimes, grief reactions are disenfranchised because people are not allowed to publicly show grief or feel like it is inappropriate and therefore grieve alone. When people do not have institutional

support to validate their loss, it hinders grief processing (Wladkowski, Kusumaul & Latimer, 2021). In this sense, it is important to make employees feel validated in their feelings and develop policies that help build better work environments that allow dealing with grief in various ways.

In line with the times and the context we live in, organizations need a better approach to grief. Acknowledging grief as a normal emotional response to challenging times can make healthier workplaces, happier employees, and increase productivity. Now more than ever, it is essential for organizations to recognize the importance of managing grief adequately, as people spend a lot of time in the workplace and “traditional support systems such as the extended family, religious communities, and government institutions have lost influence” (Petriglieri & Maitlis, 2019).

The workplace is one of the primary domains where people choose to fulfill their spiritual and social needs, in addition to their economic requirements. In this sense, spirituality in the workplace, linked to other practices and policies designed to answer to and support grieving employees, can promote a meaningful work culture and a sense of community that permeates organizational processes and outcomes.

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KEY TERMS AND DEFINITIONS

Bereavement: The actual state of loss and mourning.

Grief: The emotional and physical reactions to loss.

Loss: State of no longer having something or someone.

Mourning: The process of dealing with loss.

Pandemic: An epidemic that spreads worldwide.

Scale: A survey or questionnaire with different variables for analysis.

Support: The action of encouraging and helping someone.

Chapter 4

An Ecosystem Approach to Human Resource Management: Dialogues in a COVID-19 Context

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ABSTRACT

Amid the COVID-19 pandemic, both practitioners and academics faced surmountable issues that created a massive toll on both organizations and employees. The new complexities surrounding organizations call for novel approaches in understanding the future of work and its components. HR carries a critical strategic function for organizations to adapt to the various complexities and develop strategies that enable them to manage people when uncertainty prevails. The “ecosystem” emerged as a concept that drove theoretical and HR strategy discussions in the last two decades. Its advancement reflects a growing interest regarding the interdependence in elements, structures, and actors across organizations and activities. The COVID-19 pandemic highlights the critical importance of interconnectedness for surviving in today’s highly volatile environment. Thus, this work proposes a preliminary theoretical model of the HR ecosystem in the COVID-19 context using the arguments of systems and complexity theories and the current HR literature.

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INTRODUCTION

Organizations are complex and dynamic structures where diverse units, teams, and people interact to pursue the objectives and plans that are constantly evolving to meet the expectations of today's highly volatile environment. Groundbreaking technological developments, rapidly changing environmental conditions, and social, political, and economic crises enormously impact organizations and business systems. The COVID-19 pandemic accentuated the effects of these trends and crises on how we understand, organize, and do business (Minbaeva, 2021). This experience calls for a shift in defining, positioning, and aligning human resource (HR) management systems to deal with new challenges.

When organizations are viewed as systems, the only way to adapt to volatile situations is through a strong interaction among its sub-systems. Consequently, these systems' primary performance indicators are their capacity to change together and the speed of adaptation. HR as a dynamic system should meet the requirements of such complex conditions. In this regard, HR and its sub-systems must design strategies and practices that respond to internal and external stakeholders' diverse and rapidly changing expectations.

The concerns that HR cannot effectively respond to the pace and dynamics of the complex environment are prevalent in the literature (Butterick & Charlwood, 2021; Camuffo & De Stefano, 2019; Harney & Collings, 2021; Kinnie & Swart, 2019; Snell & Morris, 2021). There is a general concern that a sole concentration on a "best practice" framework may endanger the theoretical validity and practical usefulness of strategic HR research (Jackson et al., 2014). Snell and Morris (2021) state that while businesses confronted global competition, diversification, comprehensive quality control, outsourcing, and strategic partnerships in the 1980s, the logic of a new system began to dominate organizations. As a result, it changed both the field of strategy and the ultimate mission of HR. The complexity surrounding organizations requires an analysis of the individual elements of the HR function, along with ways in which the pieces fit together into a more powerfully integrated system for managing people (Snell & Morris, 2021).

Furthermore, companies' strategic challenges reinforced HR to execute increasingly complex strategies, support variation in the organization, and continually recombine and integrate that variation (Morris et al., 2016). This reframing points to the issues of fit and alignment and calls for dynamic, multi-actor, and polyadic HR systems, which depicts HR as a more complex ecosystem comprised of many interacting components that include differentiated human capital capabilities, segmented cultures, multiple workforce compositions, and strategic complexity (Snell & Morris, 2021). This complexity can be interrogated through "the ecosystem perspective", which has grown prevalent in theoretical and applied strategy discussions over the last decade. An ecosystem refers to a group of interacting yet semi-autonomous entities or actors that depend on each other's activities and therefore are somewhat hierarchically controlled (Jacobides et al., 2018, Meijerink & Keenan, 2019; Wareham et al., 2014). The ecosystem perspective reflects a growing interest in and concern about interdependencies across organizational systems' elements, structures, and actors.

In the context of this chapter, the HR ecosystem, re-organized in response to the COVID-19 pandemic, is investigated concerning the recent theoretical and practical underpinnings. As the COVID-19 has disrupted the world of work, an emphasis on a series of topics has emerged, including a strong connection of HR systems to the external context, such as interaction with societal and institutional factors (Cooke et al., 2021). As COVID-19 left a mark on current global and local working patterns, many issues in the HR ecosystem remain underexplored. In this chapter, the ecosystem perspective is brought to HR to

tie the internal and external components into a systems thinking model. This work attempted to create a theoretical groundwork for an HR ecosystem model in the COVID-19 context, applying the grand theories' premises. The chapter thus contributes to the existing body of knowledge by synthesizing systems theory to map an ecosystem approach to HR, presenting a holistic strategic positioning of the HR ecosystem in COVID-19 conditions, and creating a basis for future qualitative and quantitative research.

SYSTEMS THEORY AND HUMAN RESOURCE MANAGEMENT

The degree to which HR is receptive to changes in the complex environment has become a focus of interest (see Harney & Collings, 2021; Kinnie & Swart, 2019). Complex relationships that linear linkages cannot explain complicate and obscure work-life for all actors, highlighting the critical need for diverse ways for the system's survival. The latter mindset underlines the dynamics affecting the long-term viability of a healthy system.

The term "ecosystem" or "ecological system" has been defined in various disciplines and studies. Ecosystems are generated by living organisms' mutual relationships and interactions in a particular environment (Grumbine, 1994). According to Mars and Bronstein (2018), an ecosystem comprises nodes interacting and operating. Nodes are linked to each other by flows of information and resources. The relationships between nodes are dynamic and subject to change over time; they can expand, shrink, or even vanish totally. Business ecosystems are likely to exhibit similar characteristics to biological ecosystems (Mars & Bronstein, 2018). Organization-specific components, i.e., structures, elements, and actors, may act as nodes, and the information and resources will flow amongst them. Although the scope and the space of an ecosystem may change, the essential characteristic is the active collaboration among the components that create value as various internal and external factors affect the ecosystem.

Systems thinking is a holistic approach that directs attention from "the parts" to "the whole" (Checkland, 1997). Kast and Rosenzweig's (1988) conceptualization of the sub-systems is consistent with this approach. According to their theory, the system is composed of goals and values, technology, psychosocial, structural, and managerial sub-systems. The goals and values sub-system includes the general and specific goals of the organization and the behaviors, methods, norms, and overall values adopted to achieve these goals. The organization derives many of its values from the broader system, the sociocultural environment. A technical sub-system incorporates the technology and information required to perform tasks, including techniques used to transform inputs into outputs. Organizations have a psychosocial sub-system consisting of behaviors, motivation, status, roles, values, expectations, and attitudes at the individual level and interrelationships at the group level. Structure refers to how tasks are divided and coordinated in the organization. It relates to organizational design, positions, job descriptions, written rules, workflow, authority, and communication. On the other hand, the managerial sub-system dominates the entire organization by associating the organization with its environment, setting goals, developing strategic and operational plans, designing the structure, and establishing control processes (Kast & Rosenzweig, 1988). Mele et al. (2010) mention that the communication and interaction between the elements that make up the systems -sometimes autonomous elements and sometimes sub-systems- are in rational and purpose-oriented inter-connections. Similarly, according to Koçel (2011), the elements and parts in the system are connected via communication processes to support these objectives and the organization's purposes.

As one of the components in the organizational system (Chaudhry et al., 2015), Human Resource Management interacts with the sub-systems defined in Kast and Rosenzweig's (1988) model. However, the contemporary business world's complexities are superimposed on the HR system, creating a more complex, dynamic, and reflexive environment. Complexity theory extends the systems thinking approach to incorporate strategies that will enable organizations to cope with the pressures and challenges arising from both the internal and external environment.

Complexity in Organizational Systems

Contemporary business models, modern ways of organizing, avant-garde work designs, and complexity surrounding organizational systems pave the way for a paradigm shift that calls for a revised work ecosystem (Schneider et al., 2017). According to Uhl-Bien and Arena (2017), the complexity begins in organizations as pressures, often in the form of an adaptive challenge – a problem for which a) there is no known solution, b) people must work together in new partnerships who have not worked together before, c) these partnerships are characterized by conflicting views (i.e., high heterogeneity), and d) agents have high interdependencies. On the other hand, Snell and Morris (2021) assert that complexity exists in four sub-systems: strategy, composition, capabilities, and culture.

As organizations' complexity increases, the human resources ecosystem must replicate it, nurture it, and keep it together through fit and alignment. The objective of alignment is not to homogenize companies but to maintain complementary assets in harmony to foster variety while maintaining the system's integrity. The organization must coordinate both divergence and convergence to achieve complex alignment. Teece, Pisano, and Shuen (1997) claim that organizations urge to observe their environment, analyze markets and competitors, quickly reform their assets and structures, and achieve required transformation internally and externally to catch competitive advantage.

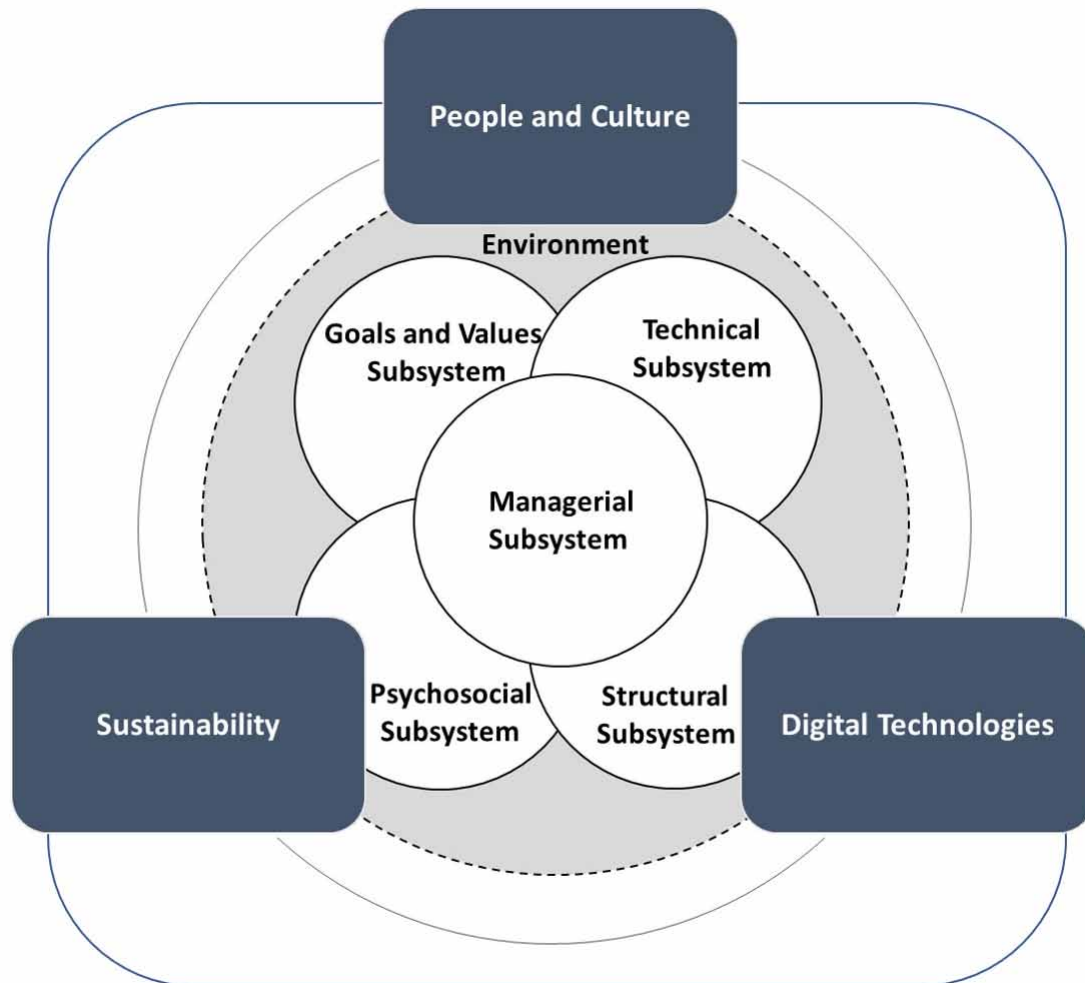
Organizations cope with external complexity by also increasing their internal complexity. For instance, increasing functional specialization, structural differentiation, and institutional processes elevate the internal complexity of organizations (Schneider et al., 2017). Here, "collaborative complexity" arises when organizations collaborate and develop common standards. Therefore, organizations can create internal and collaborative complexity to survive through HR's critical and proactive role in developing techniques for strategically integrating various components and services to increase performance in a complex world. Organizations thus have to achieve compatibility and alignment with the human resource ecosystem, as all firms must design strategies and manage a variety of stakeholders and workforces, including diverse workgroups, talent, employment connections, and cultures. Furthermore, HR alignment has an essential impact on the organizational culture since it positions professional identity, individual purpose, social communities, and cultural values as strategic assets (Snell & Morris, 2021). This complex ecology of the workforce necessitates fit and alignment, which results in divergence between diverse employee groups and convergence in how they are managed concurrently. Organizations must balance these opposing demands with disparate motivations to achieve HR-system fit while remaining adaptable in a competitive context. Because organizations use various HR systems to manage employees with various demands and ambitions, they must ensure that these systems work in harmony and support the overall HR strategy (Kepes & Delery, 2007). It is more challenging to manage the system collaboratively and maintain it aligned and ordered than dispel it. The main issue is maintaining positive involvement and unity through human resource strategies as the system grows, manages, and rebuilds divisions.

The complexity of the interaction-communication-resource exchanges among the elements of the HR ecosystem is proportional to the number of those elements (Scott, 1992). The degree of HR complexity is assumed to be proportional to the internal and collaborative complexity (Schneider et al., 2017). Thus, organizations should evaluate the degree of complexity both within and outside the organization when developing human resources plans and policies. Although an environment with defined boundaries is frequently perceived as unique for organizations, the components can also be shared by other corporations' environments. The shared components of the wider environment necessitate strategic collaborations, which affect businesses' proclivity for "pluralism" (Kalleberg, 2009; Swart & Kinnie, 2014). Thus, communal initiative and collaborative complexity will be available to generate new norms and standards particular to the field.

According to Mayrhofer (2004), the lack of a comprehensive theoretical framework for contemporary human resource management is one of the driving forces behind theoretical model building. Recently, many grand and less grand theories like behavioral theory, economic theory, and systems theory (Kast & Rosenzweig, 1988) are used as essential perspectives for HR. This chapter proposes that the HR ecosystem could be conceptualized using more than a mere aggregation of actors and processes by using general systems and complexity theory as the primary frameworks. Understanding the nodes and boundaries of interactions among the elements of the systems and how the internal and external pressures shape and transform these interactions is of utmost importance for new generation HR systems. Therefore, to articulate how the HR ecosystem can help build a framework to handle complexity and uncertainty under COVID-19 conditions, this chapter proposes a preliminary theoretical model, amalgamating the systems theory, the existing literature on HR in the COVID-19 context, and the contemporary business discourses (Figure 1).

The general systems theory by Kast and Rosenzweig (1988) may explain how the base of the HR ecosystem model functions. At the core of the model are the essential elements that act as the sub-systems of the HR ecosystem. These sub-systems are susceptible to changes in both the external and internal habitat of the organization. New waves of technology, sustainability, and employee-employer relationships frame and reshape the system's strategies and sub-systems and their interaction with a complex environment.

Figure 1.



Elements of the HR Ecosystem in the COVID-19 Context

The rapid spread of the novel coronavirus infection (COVID-19 virus) has led to a severe global economic downturn (Al-Mansour & Al-Ajmi, 2020). Governments imposed total lockdown, banning non-essential travel and requiring the closure of all non-essential activities. The strict government control measures led to many inconvenient working conditions. The tremendous uncertainty inflicted by the COVID-19 pandemic shook traditional working methods and forced organizations to adopt new strategies (Collings et al., 2021). As COVID-19 disrupted our work and organizational systems, HR research has been critiqued for its failure, or conceptual inability, to include novel and contemporary HR practices (Harney & Collings, 2021). Thus, the traditional conceptualizations of HR systems require modification and a shift away from a narrow focus to a more holistic approach (see also Crane & Matten, 2020).

Throughout the pandemic, the most difficult challenge was to create a shift of worldviews about the order of things and what was known about organizations, entities, and systems. Tremendous pres-

sure was on individuals, leaders, and corporations in responding to the extraordinary conditions of the COVID-19 pandemic. The World Bank's "Global Economic Prospects Report" (2021) predicts global corporate growth despite the pandemic's challenges. It assumes that the pandemic does not cause long-term damage to financial institutions; growth is likely to rebound aided by unprecedented assistance from fiscal, monetary, and financial sector policies. Data indicates that organizations that rapidly reinvent themselves and adapt to new situations by improving operating procedures and work policies such as remote or hybrid working and introducing new ecosystems to reach customers will experience growth (Gartner, 2021). However, there may be concerns about how this increase will be accomplished, i.e., growing in the face of uncertainty. Therefore, businesses must be resilient, flexible, and adaptable to discover new ways to achieve additional benefits and anticipate the future. Then, the following issues may arise on how organizations can acquire these skills and be prepared for the unknown of how HR professionals can contribute at the organizational level. For instance, many organizations could not adopt flexible work practices such as work-from-home until the COVID-19 pandemic. FlexJobs's study (2019), conducted with more than 4000 employees across the USA, can be given as an example that the remote working practices in enterprises increased by 7.9% from 2016 to 2017 and by 44% in the last five years. Organizations incorporated flexible working practices during the lockdown (CIPD, 2020; ILO, 2020). Additionally, PwC conducted a poll with 669 CEOs in which 78 percent of respondents indicated that they believe remote employment will become permanent in the long run (PwC, 2020).

All these rearrangements of the working type also challenge the human resources field. For example, during the pandemic, HR professionals had to take complex decisions for their organizations. Sometimes reaching out to health systems, hygiene materials, even support systems at home were compelling. Sometimes, the decisions or practices HR professionals have turned into decisions that affect the lives of their employees and their families, and even society. It is shown that to enable these interventions, HR professionals strongly need to revamp policies and appropriate support measures.

According to a survey of 800-plus HR leaders, one of the HR trends resulting from coronavirus pandemic disruption (Gartner, 2021) is the increase of organizational complexity. Following the global financial crisis in 2008, worldwide mergers and acquisitions (M&A) had accelerated. A similar acceleration of M&A and nationalization of companies after COVID-19 is anticipated. Corporations will focus on growing their geographic diversification and investing in secondary markets to mitigate and manage risk in times of disruption. It may lead to a rise in the complexity of scale and new challenges for leaders.

On the other hand, some believe that a talent battle is underway, and as the pandemic's impacts fade, employee expectations and requirements have shifted. Flexible work arrangements enable a company's talent pool to expand enormously without regard for geographic limitations. To win this war may require reviewing and revising workforce policies (Dowd, 2021). Moreover, Joos et al. (2020) pointed out that global mobility is evolving, and flexible global working arrangements should allow international business travelers, flexpatriates, short-term international assignees, international commuters, and rotational assignees. The two key enablers in this evolution are the need for agile structures and efficient mechanisms to transfer globally dispersed knowledge.

Both potential changes in the business world will also create some talent issues. Following Talent Shortage Survey, it has revealed that established markets may suffer a talent deficit, and emerging markets will experience talent surplus (ManpowerGroup, 2021). Therefore, organizations need to reset their recruitment and remote and hybrid working to benefit from the supply-demand balance of talents. These facts draw our attention to the organizational needs to adapt to the changing business and employee demand. Likewise, they should acquire new skills for both global recruiting and flexible work

practices. The Global Talent Survey of Oxford Economics (2021) reported that 42% of technological advances and 41% of globalization are the underlying forces compelling organizations to find new ways to manage in a complicated and changing global environment. Awareness of global markets and managing diverse employees are two new workforce skills rising in demand. In this process, the learning and development policies of the organizations are crucial. In 2020, McKinsey surveyed more than 190 chief officers and functional leaders across industries. Their results showed us that CHROs should consider the consequences of massive workforce transformations by the COVID-19 and how reskilling can assist in filling skill shortages while keeping people committed to their jobs. They offered an agenda for post-pandemic learning and development, which includes broad-based digital training in essential skills, focused upskilling rooted in changing work and leadership development to set clear goals, focusing teams, and rapid decision making.

As the pandemic resets major work trends, HR professionals must rethink their current approaches, systems, practices, and support mechanisms. It appears that HR professionals will develop robust solutions through collaborative problem solving, learning from one another, and sharing experiences. An ecosystem mindset may guide organizations as constituents of a single connected global community, cooperating to adapt to an unprecedented, constantly changing environment. HR professionals can go beyond obstacles, forging new connections to solve problems and create new perspectives.

As summarized above, the COVID-19 exacerbated complexity pressures and activated elements in the HR ecosystem, and a challenge to create value through collaborative efforts. The primary tracks connecting the sub-systems in the HR ecosystem have surfaced as new technologies, a shift in employee-employer relationships, and sustainability issues. The elements of the HR ecosystem are thus introduced concerning the recent trends and arguments surrounding organizations in the COVID-19 context to provide a framework that will inspire future research.

Digital Technologies

Technology's impact on lives and organizations continues to grow. As technology penetrates in the work ecosystem, organizations encounter a changing landscape marked by increased automation, artificial intelligence, and widespread digitization of workspaces. With the improvement of technology and communication strategies, almost every human activity within organizations appears to have moved to the electronic domain. Virtual meetings have largely displaced face-to-face meetings, online technology has displaced physical interaction, and technology-enabled work from home has been acknowledged as an equally successful working method. Although there is debate about the absence of physical contact, it is found that individuals have adapted well to the online system since it is less time-consuming (Dash, 2020). A recent Harvard Business Review (HBR) study confirmed that knowledge workers have been more productive during the pandemic than in an earlier 2003 study.

The digital age creates many opportunities (Parry & Strohmeier, 2014) by converging businesses, people, and artificial agents such as the internet of things (Cearley et al., 2017; Yablonsky, 2019). While organizations are capable of surviving without Industry 4.0 applications, for the time being, strategy reinvention will be required to compete in the long run. Human resource management will be crucial throughout this reinvention because it will enable the organization to make the best possible use of its people's top abilities and competencies. So, human resource management must determine, establish, and apply digitalization for its benefit.

Today, technology and collaboration tools enable the core HR activities related to an employee's life cycle from staffing to exit management. E-video interviews have become the norm, and job tests and work samples are instituted online. Organizations observe that online technologies are more convenient since they can do interviews with more candidates in shorter periods. Job offers are sent via online tools, and onboarding formalities are also completed online. Technology also plays a significant role in enabling a positive employee experience. Therefore, ensuring employee experience in a virtual context requires companies to embrace an all-new digital culture aligned with the organization's values.

Over the past year, due to COVID-19, there has been an increased reliance on technology through the growth of remote working, online meetings, and robotics to undertake manual tasks such as cleaning and deliveries (Cooke et al., 2021). Even though all was predicted, its early arrival has caught many organizations unprepared and made it difficult for companies to sustain and survive the far-reaching impact on the future of work. In some cases, this fast transition resulted in various issues for the organizations, including invasion of privacy, a divide between those who have access to new forms of information technologies and those who do not, reducing the number of employees in HR departments. Moreover, at the sudden lockdown period, no plans for technological advancement were available, which is critical given that "Work from Home" became the new normal. In addition, network connectivity challenges harmed employees, the inability of equipment such as mobile phones and laptops to add programs aiding WFH, and the blurring barrier between work and family life (Chawla et al., 2020).

People and Culture

As organizations are expanding their activities geographically, the borders between nations are fading, and thus culture emerges as an essential element in the international HR ecosystem. Since cultural dimensions refer to beliefs and values in an ecosystem, HR needs to align its strategy with cross-cultural competencies, cross-cultural leadership, and learning styles of different cultures (Peterson & Castro, 2006).

To manage and orchestrate diverse cultures and values, organizations need to develop various competencies. HR's role in this respect focus on creating a shared vision among employees so that they will be open to innovation, develop social skills, and work on co-creativity. Organizations' openness to cooperation and coordination in diverse settings considering all the different stakeholders will help them gain a competitive advantage. So, HR needs to rely on the actors in its ecosystem and gain access to specific competencies in its external environment. The recent motivation to shift from HR departments to "People & Culture" departments might manifest this perspective. McKinsey's report dated June 4, 2021, describes this shift as "Back to Human" and discusses HR's role "from processes to people", and "engaging more directly and deeply with employees" (Khan et al., 2021).

As organizations experience shock periods like the COVID 19, HR may find investing and engaging in cultural change programs challenging. For instance, when organizational members find change genuinely upsetting and scary, they may ignore or avoid necessary transformations (Smith & Elliott, 2007). Additionally, shocks might cause organizations to be hypocritical (Brunsson, 1989) when external pressure compels organizations to alter highly apparent components of their culture while leaving more subtle aspects unchanged. Furthermore, shocks might cause organizations to behave rashly if previously accepted procedures and assumptions are abandoned, and individuals give to investigate extreme alternatives (Spicer, 2020).

Experimentation is necessary for a planned culture change. In culture change initiatives, it is critical to elicit some degree of reflexivity (Alvesson & Spicer, 2012), which requires challenging members

of the organization to reflect critically on pre-existing culture and attitudes. Organizations should be encouraged to use pre-existing “cultural toolkits” to create a new culture that is more in tune with emerging environmental issues (Howard-Grenville, 2020), such as the conditions of the COVID 19. The new dynamics, such as global economic downturns, total lockdowns, strong government control measures, and atypical ways of working, communicating, and collaborating (Chen, 2021), turned into a setting requiring a new culture.

While it is well established that new practices should be conveyed in ways that appeal to organizational members’ pre-existing thoughts and feelings (Giorgi, 2017), HR needed to act quickly during the COVID 19 pandemic. In the majority of cases, there was no time for adaptation. The new practices should be explained, appealing to organizational members’ pre-existing beliefs and feelings (Spicer, 2020). HR started acquiring new duties and obligations in the COVID 19 setting, such as ensuring organizational culture outside the physical workplaces while working from home or monitoring the impact of rapid cultural transitions on people’s identity, emotions, and well-being (Spicer, 2020).

The COVID-19 pandemic accentuated rebuilding an organizational culture for employees to adapt to flexible work arrangements and transition toward a hybrid working model (AM et al., 2020). Developing and maintaining a cohesive culture that supports employees’ connections and interactions (Lund et al., 2021) and encouraging social support and collaboration among the employees is now one of the top priorities of HR practitioners. HR practitioners even voice the importance of developing and implementing a digital organizational culture handbook, which should be made available to employees working remotely, to provide toolkits that vehicles the symbolic aspects of the organizational culture, such as values (Asatiani et al., 2021). In the new HR ecosystem, the people and culture sub-system represents one of the most critical nodes which tie the system together through interactions, values, social connections, and symbols.

Sustainability

The sustainability stream is the one that has recently gained critical recognition in the HR ecosystem context. The academic literature is represented by a good mix of theoretical and empirical content providing evidence of the impact sustainable HR has on organization and employee outcomes (Boudreau & Ramstad, 2005; Cohen, 2010; Podgorodnichenko et al., 2021; Voegtlin & Greenwood, 2016).

Studies suggest that HR creates sustainable practices with internal outcomes such as profit, improving employee satisfaction, engagement, and compliance (Shen, 2011). On the other hand, some claim that HR creates externally oriented sustainability practices to improve social and environmental health. Thus, the contribution of HR to issues about sustainability is through the link to the triple-bottom-line of the organization (Colbert & Kurucz, 2007; Elkington, 1994).

Indeed, it is hard to approach the notions of sustainability and responsibility in isolation; they have been used interchangeably (Bansal & Song, 2017; Canizares, 2021). Therefore, both are societal constructs and may include various topics and actors (Dahlsrud, 2008). Corporate social responsibility (CSR) activities involve both internal and external stakeholders. Employees, community, consumers, environment, governmental and non-governmental organizations are vital stakeholders (Šain, 2021) and the elements of the business ecosystems. So, considering the demands of stakeholders and the company and protecting, sustaining, and enhancing critical environmental, social, and economic resources for the future should be part of the business strategy to ensure the company’s continuity in the long run.

Especially in times of crisis, societies expect more socially responsible initiatives. Companies face a challenge in crises, and the recent extraordinary COVID-19 pandemic is not only the most enormous healthcare challenge of this century, but it also disrupts jobs, the economy, and the environment (Šain, 2021). As a result of the COVID-19 pandemic, companies had to adjust their business strategies, which impacted their stakeholders. CSR can be a valuable and effective approach to decrease the potential effects of a pandemic and make coping with the impact of crises easier (Šain, 2021). Through the lenses of the ecosystem approach, HR functions and practices interact with the organizations' sustainability goals (Cohen et al., 2012; Taylor et al., 2012). The importance of HR's role in creating ethical and socially responsible workplaces has been emphasized by Hatcher (2002), and a socially conscious HR system has been conceptualized by Bierema and D'Abundo (2004).

Research on the link between HR and CSR is mainly found in three different streams: the CSR, the HR, and the HRD literature (Jang & Ardichvili, 2020). The CSR stream mainly demonstrates how CSR can be leveraged to support organizations' strategic HR goals and objectives, such as attracting, retaining, and motivating employees (Becker, 2011). Examples of sustainable HR practices include recruiting and selecting employees based on CSR competencies and values, training and development in CSR, communication, and CSR metrics in performance management and remuneration (Renwick et al., 2013; Renwick et al., 2016). By implementing these practices, the HR function can strategically support the CSR agenda via the preparation of employees for effective involvement in CSR-related goals (Podgorodnichenko et al., 2021). This stream is represented by the conceptualization of socially responsible human resource management (SR-HR). SR-HR goes beyond providing employees with superior pay and working conditions and may include recruiting and retaining socially responsible employees, providing CSR training, and taking account of employees' social contributions in promotion, performance appraisal, and remuneration (Shen, 2011).

On the other spectrum, research in HR and HRD argues for HR's role and involvement in enabling and promoting CSR in organizations (Garavan & McGuire, 2010; Jamali et al., 2015). Although these streams underline intersections of CSR and HR, they reflect significant differences in terms of research themes, theoretical assumptions, and the role of HR practices in the CSR-HR link (Jang & Ardichvili, 2020). Independent of the different foci of each stream, all three support the ecosystem approach by demonstrating strong interactive ties among these functional areas of organizations. Rather than focusing only on economic profit, this holistic approach to HR builds a sustainable HR approach (Kramar, 2014).

HR's Contribution to Competitive Advantage

Organizations face rising uncertainty as they handle today's "grand challenges," or grave concerns that exceed national, economic, and societal boundaries (Carnevale & Hatak, 2020). HR has been primarily reactive and focused on intra-organizational concerns; however, as HR theory and research evolve, the impact of the interactions among a firm's social context and internal-external environment has gained prominence. Thus, the HR functions need to act as a change agent and a strategic partner rather than an administrative expert (Noe et al., 2016) and undertake new obligations that extend beyond the organization's boundaries.

Today's enterprises must be cautious and agile in the face of unforeseen occurrences, such as external crises, which heighten uncertainty and represent direct challenges to the organization's performance and existence. As a result of the current COVID-19 pandemic, businesses are suddenly forced to navigate the unexpected and hence develop novel solutions to difficulties appearing across a wide range of op-

erational domains. Although the need for pre-crisis readiness and good planning to successfully manage disasters have been repeatedly stressed, the organizations did not respond well in addressing the crisis (Adikaram et al., 2021). With uncertainty being a hallmark of “crises” (Bundy & Pfarrer, 2015), critical preparedness was not the sole factor contributing to the crises’ successful resolution. According to Rappaccini et al. (2020), resilience to crises also requires agility, redundancy, and elasticity. The qualitative research by Adikaram and others (2021) indicated that the nature of the industry (whether manufacturing, technology-based, or service-based, as well as the multinational or local nature of the companies), the availability of resources, and, most importantly, the role of the human resource professionals, could all play a role in successful crisis management.

Competitive advantage is crucial for a firm’s survival and adaptation to global and local economic conditions. Economic viability is projected to be maintained despite the pandemic by good management of internal business operations and cooperation of government and external partners in setting clear regulations and guidelines. Synchronization and effective control of these two factors might contribute to a firm’s competitive advantage.

Competitive challenges influence the role of HR. For instance, competing through sustainability provides a return to shareholders of the firm, increases the quality of products and services, supports social and environmental responsibility, adaptation to changing characteristics, demands, and needs of the labor force save the business in terms of legal and ethical issues and provide with the effective use of new work arrangements (Noe et al., 2016). In addition, competing through globalization makes the firm expand into foreign markets and prepares the employees to work in foreign markets. Moreover, competing through technology causes the transformation in the work roles of both employees and managers and gives rise to the development of HR dashboards and the use of HR analytics (Noe et al., 2016).

Organizations should function without sacrificing their resources and their employees, the community, or the environment, i.e., sustainability is requisite. Engaging in responsible and ethical business practices, dealing with economic and social changes, providing high-quality products and services, and practicing environmental responsibility are among the examples of sustainability (Noe et al., 2016).

As a critical player for all kinds of ecosystems, the government can also influence the HR ecosystem in many ways. For example, the government can affect the macro-economic factors, the dynamics within the labor market, and employment conditions by introducing new legislation. For instance, the changes occurring in an organization’s international environment are reflected in the labor market. They directly impact the intra-organizational context of human resource management in the form of strategic, structural, and cultural circumstances influencing HR policy and practice (Pocztowski, 2019).

The beliefs on the role and significance of context in human resource management indicate that they have existed in theory and practice for an extended period. Historically, it has typically manifested itself as a static vision, as something inherent and generally stable (Pocztowski, 2019). However, the context is now considered an increasingly important element in enhancing human resource management practices and scientific studies. Strengthening the significance of context in human resource management on a practical level entails refining tools for analyzing contextual aspects, monitoring emerging trends, forecasting changes, and anticipating their impact on companies, including the human resource function. In addition, expanding the role of context in research requires moving beyond descriptions of its current state, similarities and differences in approaches to explaining and enriching knowledge about the essence of context, the relationships between various contextual factors, and their interdependence with human resources management policies and practices.

HR is mainly in the center of this turmoil; given the impact, COVID-19 has on employees, there exists the need to safeguard their health and safety and the necessity to manage employees in a new situation. Sudden lockdown and altering workplace norms have created a problem for organizations' HR departments; they are obliged to promote adaptability and cope with the sudden adjustments the pandemic requires (Sharma, 2020). Despite the prevalence of crises in the modern business world and the several big crises that have troubled firms over the last few decades, there appears to be a lack of study on how HR practices have been applied and HR professionals have handled crises (Adikaram, 2021).

HR professionals were confronted with the challenges of securing authorization from authorities to restart firms, establishing alternate work arrangements, and assuring employee involvement. Finally, due to the pandemic's impact, many businesses lost clients and revenue, precipitating a financial crisis for the enterprises and compelling HR professionals to manage layoffs, employee benefits, and employee morale (Adikaram et al., 2021). How HR professionals manage crises unavoidably impacts a company's operations, reputation, profitability, and survival.

The organizations whose HR professionals have had a more strategic role, becoming involved in all strategic topics, making decisions, formulating strategies, and implementing them, appear to have done well and rapidly in resolving crises and bouncing back, and transitions appear to be smoother (Adikaram et al., 2021). Amid COVID-19, many organizations required HR professionals to involve in various administrative tasks, such as acquiring curfew passes, ensuring health and safety measures are in place, arranging transportation, and paying salary. Regardless of the nature of the organization, some HR professionals were relatively inactive, simply following orders from senior management and getting involved in mundane administrative labor. The COVID-19 pandemic is a global crisis touching almost every country and industry, unlike other health crises, and outweighs all previous financial and health disasters in intensity, breadth, scope, and nature. As a result, it is unquestionable that COVID-19 posed significantly more obstacles for HR.

FUTURE RESEARCH DIRECTIONS

Ecosystems are continually developing and balancing the interactions between different organisms to maintain a certain level of stability. Likewise, work-life is also evolving due to the economy, technology, climate, health, and other factors to reach a certain level of stability. It demonstrates that interconnectedness has significant implications for business, science, and everyday life. For example, during the COVID-19 pandemic, not only have business needs, and demands evolved, but so have people's mindsets, behaviors, and expectations of work life. While the pandemic increases uncertainty, worry, and anxiety, employees are concerned about more than their physical safety; they are also concerned about potential job disruptions and how the organization intends to manage its operations. Since business disruptions mean turmoil, leaders and HR professionals must ensure that their employees, shareholders, and other stakeholders believe in their organizations' readiness to handle the crisis (Gartner, 2020). Organizations tried to find the best solutions to continue their business, engage their employees to the work, monitor and evaluate their employees' performance, and maintain psychological safety during this period.

Meanwhile, the HR role becomes one of the critique roles in organizations to support these solutions. HR professionals have been expected to work with various partners, experts, consultants from various areas such as government, legal, health, insurance, and even colleagues from different sectors to propose solutions to their organizations and employees' needs. Eventually, they need to work with their ecosystem

to find the best solution to their organization. The need to appeal to others' opinions is inevitable so that the interaction and connectivity within the ecosystem can help HR professionals sustain their business.

According to Gartner (2021), data fabric, cybersecurity mesh, privacy-enhancing computation, cloud-native platforms, composable applications, decision intelligence, hyper-automation, Artificial Intelligence (AI) engineering, distributed enterprise, total experience, autonomic systems, and generative AI will be the top strategic technology trends for 2022. As it is stated that these trends will help organizations to meet the CEO's priorities to scale, adapt, and grow. In addition to Gartner's report, other examples of digital technologies used in the industry 4.0 era are sensor technologies, robotics, IoT (internet of things), and VR (virtual reality) technologies. Accenture's 2021 technology trend report has also shown that growing investments in data, AI, and digital twin technologies give rise to a new generation of business and intelligence. There will be a world rather than physical, associated with the digital space models of whole factories, supply chains, product life cycles, and more. In this context, "Decentralized autonomous organizations" emerged as the new sorts of establishments based on interactions between digital stakeholders and decentralized governance so that for the last five years, discourses shifted to whether it would be an opportunity of the future or cause obstacles from a legal, governance, and security standpoint (Hassan & De Filippi, 2021).

If organizations transform their structure to "decentralized autonomous organizations", HR structure can not stay as centralized structures, and the role and responsibilities of HR should also change. It is also known that for the past 30 years, HR departments have primarily used centralized, decentralized, a mix of both/matrix, and outsourced organizational designs. However, so far, a decentralized HR organization is defined as "autonomous HR functions housed in separate business units (e.g., by product line or geography) that operate and make decisions mostly independent of the other units" (SHRM, 2016: 1). In this regard, a future research question would be to determine the optimal human resource structure, roles, and duties inside "decentralized autonomous organizations" and how this structure interacts with the HR ecosystem.

Furthermore, technology, particularly AI and blockchain, spreads like a virus and infects every unit of an organization. Undoubtedly, the management of HR is infected and transformed. Even though the transformation appears to be costly, the benefits in the long term surpass the expense. According to Suk Yi and colleagues (2020), blockchain technology is one of the safe and trusted technologies that provide HR with a platform to optimize working procedures, save time for addressing issues, and provide an opportunity to connect with stakeholders. Furthermore, blockchain technology helps human resources resume verification, background checks, onboarding, employment records management, data privacy, and security. In this regard, there would be future research questions to anticipate the further effects of blockchain technologies on the HR area. For instance, can we talk about the transparency of compensation and benefits and performance management by using blockchain technologies? If we can talk about it, how does the transparent management of companies by using blockchain technologies contribute to their employees' organizational commitment, cooperation with other colleagues, and development?

However, to adapt these technologies to their current businesses, HR professionals need to identify areas that can contribute to their business and develop their implementation settings. In other words, HR professionals need to acquire new skills or expand their network to reach out the skilled persons to adopt these technologies into their HR systems. It is stated that Industry 4.0 necessitates workforces that are skilled in the usage of crucial frontier technologies to achieve optimum company efficiencies and benefits. The absence of adequate skills, such as a lack of contact between industry players, their networks, and universities or high schools in the workforce, is a significant barrier to implementing Industry 4.0

in several nations and sectors (Fachrunnisa & Hussain, 2020). Therefore, future research might examine shared solutions that the ecosystem can provide for the rapid learning of such competencies.

The COVID-19 pandemic has forced managers to dive into unknowns to assist their staff in adjusting to and coping with severe changes in the work and social environment. HR must identify employee-related difficulties during and after the pandemic and revise their strategy to deal with the uncertainty. Employees are impacted on both personal and professional levels, and the interplay between the two is difficult to avoid. For instance, employees who used to work in-house must quickly adapt to remote work settings. However, due to shelter in place orders and non-essential business closures, even those who work remotely face new challenges due to lack of access to alternate offices (e.g., cafés, libraries, coworking spaces). This has probably worsened the divide between work and home life, making it harder to “unplug” from work obligations (Chawla et al., 2020). Beyond the inability to separate work and personal life, the closure of schools and child care facilities increased parental expectations on employees, further blurring the lines. In addition to the demands of work-family relationships, single and childless professionals may be more sensitive to loneliness, a sense of purposelessness, and other adverse effects on their well-being (Achor et al., 2018). Uncertainties over health, employment, finances, and work overload would increase employee anxiety and stress (Li et al., 2020), reducing productivity. Isolation from others has exacerbated the suffering. The physical and mental health of the employees and their families become critical. As a result of the issues presented, employees’ personal lives were filled with stress and sorrow. They are also confronted with professional uncertainties such as employment permanence and salary disbursements (Sharma, 2020).

Under these conditions, it is not difficult to anticipate that more research about the HR ecosystem’s structural, technical, social, and emotional effects will be available in the coming days. Moreover, the HR ecosystem formed on robust theories would also appeal to HR practitioners. Therefore, it is critical to grasp their perspectives on the HR ecosystem, its components, and interactions via qualitative and quantitative research.

CONCLUSION

Organizations face increased uncertainty as they handle “grand challenges” that transcend national, economic, and cultural boundaries (Eisenhardt et al., 2016). There are numerous problems, covering various complicated topics such as climate change, severe economic downturns, and political instability (George et al., 2016). Lately, a new challenge, the COVID-19 pandemic that affects practically every aspect of work and life, emerged and has demonstrated how fundamental concerns can jeopardize a company’s health and survival instantly. Organizations were confronted with a once-in-a-lifetime great challenge that required them to step into an undiscovered field while also reforming their workforce in unprecedented technical, physical, and psychosocial dimensions. COVID-19 pandemic is still forcing businesses to remain responsive and agile in their workforce organization and management.

The COVID-19 pandemic has created a demanding environment for human resource management, with managers being forced to immediately dive into unknowns to help their staff adapt to and cope with severe changes in the work and social environment. Employees who previously spent most of their time working within the physical boundaries of their company, for example, must quickly adapt to remote work situations. In such circumstances, one of the top challenges for HR professionals is to enable their

workforce to embrace a holistic mindset and reinforce behaviors and skills that allow adaptation to an ever-expanding and changing ecosystem.

The COVID-19 pandemic accelerated the need for HR's reflections and adaptations to the complexity. The new challenges from the organizations' internal and external environment set the stage for HR to show its adhesive role among the components of the systems and ecosystem. As Ashby (1962) states in the "law of requisite variety," every system must reflect the complex nature of its environment; otherwise, it cannot respond to the problems and opportunities it encounters. So then, organizations must reflect the complex character of the environment, and HR, through its strategies and functions, must support the organization, employees, and other stakeholders in this endeavor.

As a result, to handle the challenges that companies face, the role of human resource management and its relationship with both internal and external aspects and players must be redefined. This effort will benefit the employment of an ecosystem approach, which is a new paradigm and critical in constructing new working settings (Johnson, 2019; Ulrich & Yeung, 2019). The ecosystem approach has recently opened a new window to examine the content and processes in the field of human resource management, where interdependence among actors and the elements has increased, structures have become more complex, and digitalization and technology-intensive applications have been integrated (Garavan et al., 2019; Snell and Morris, 2021). Using the ecosystem approach to HR entails characterizing the elements and actors involved in the HR ecosystem and the communications-interactions-resource exchanges between them.

This chapter proposed that the HR ecosystem be defined as more than just a collection of people and processes. Understanding how internal and external influences shape and modify these interactions is critical for next-generation HR systems. A model combining systems theory and modern business discourses is offered to express how the HR ecosystem may help construct a framework to handle complexity and uncertainty under COVID-19. The general systems theory by Kast and Rosenzweig (1988) may explain how the base of the HR ecosystem model functions. The model's core elements are the HR ecosystem's sub-systems. Changes in the organization's external and internal environments can also affect these sub-systems. A complex environment is framed and reshaped by new technology, sustainability, and employee-employer interactions.

In conclusion, to ensure successful adaptation, human resources management needs to develop divergence between various employment groups and convergence in managing them simultaneously, which requires a differentiated compatible, and complementary workforce. Therefore, human resources management should create harmony between employees who have different motives and demands while being flexible enough to keep their competitive position, which requires work redesign and training and development programs for continuous learning. In this respect, the functions of HR should be re-crafted for the emergent workplace and the new dynamics that play a role in the HR ecosystem. Thereby, organizations can combat the abrupt changes in working conditions arising from changing technology. Furthermore, technological shifts coupled with the COVID-19 pandemic have increased the system's complexity and call for agility and courage to achieve strategic objectives.

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KEY TERMS AND DEFINITIONS

Complexity: A scientific theory which asserts that some systems display behavioral phenomena that are completely inexplicable by any conventional analysis of the systems' constituent parts.

COVID-19: Coronavirus disease (COVID-19) is an infectious disease caused by the SARS-CoV-2 virus.

Ecosystem: Refers to a group of interacting yet semi-autonomous entities or actors that depend on each other's activities and therefore are somewhat hierarchically controlled.

Future of Work: Describes changes in how work will get done over the next decade, influenced by technological, generational and social shifts.

HR Ecosystem: A complex and dynamic framework of HR fit and alignment among its four sub-systems; namely strategy, workforce, capabilities, and culture.

Pandemic: an outbreak of a disease that occurs over a wide geographic area (such as multiple countries or continents) and typically affects a significant proportion of the population.

Systems Thinking: A holistic approach that focuses on the way a system's constituent parts inter-relate and how systems work over time, within the context of larger systems.

Chapter 5

From Crisis to Resilience: A Human Resource Management Perspective in the Pandemic

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ABSTRACT

Today's companies must be vigilant and flexible in the face of unanticipated occurrences, such as external crises, that heighten employee uncertainty and represent direct challenges to the organization's performance and sustainability. However, as a result of the current COVID-19 pandemic, companies are suddenly forced to traverse the unexpected and hence develop novel solutions to issues occurring across a wide range of operational domains. Several of these concerns are addressed in this chapter, with a particular emphasis on the transformation of human resource management (HRM) during COVID-19, as government and firms help their workers in adjusting to their significantly altered work environment.

1. INTRODUCTION

Grand challenges, or major issues that transcend political, economic, or cultural boundaries, are growing challenges for organizations. Climate change, catastrophic economic downturns, and political instability are just a few of the significant problems that face the world today. Organizations face urgent threats to their vitality and existence in our linked world, which necessitates staying flexible and agile in their workforce management. However, with the recent outbreak of COVID-19 ("Coronavirus (COVID-19)", 2020), organizations face a huge challenge of unprecedented proportions, one that forces them to dive into and directly manage unprecedented territory while altering their workforce in technological, physical, and socio-psychological ways never seen before. This is a considerable challenge.

After 2020, the COVID-19 will be responsible for the most significant changes in the workplace. To put it another way, this pandemic of the twenty-first century is going to wreak havoc on everything we do daily (Gössling, S., Scott, D., & Hall, C. M., 2020). As a result of this development, the organization's human resource policies and strategy will need to change (Lester, J., Cho, Y., & Lochmiller, C., 2020). This "social gap" is a critical component of transition history, and it must be emphasized. With

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the advent of COVID-19, a new component emerged: telecommuting. It is a task-oriented work culture that is facilitated by a knowledge-sharing system. Employees are offered the option of working from home to fit their personal preferences and the job's efficiency. To assist their employees in adapting to and coping with the drastic changes taking place in the workplace and social environment, human resource managers (HRM) have had to immediately travel into the "imponderables" as a result of COVID-19 (Iza Gigauro, 2020). Employees accustomed to working inside the confines of their company's physical limits are now needed to adapt rapidly to working remotely. Even individuals who have been accustomed to working remotely from home confront new obstacles due to the difficulty of accessing alternative workspaces (such as coffee shops, libraries, coworking spaces) as a result of shelter in place orders and the closure of non-essential companies. As a result, "unplugging" from work has become more complex, resulting in a more fragmented work-life balance. Since schools and childcare services were closed, employees' parental obligations have expanded and blurred the barriers between work and family life. Employees with children may find these work-family ties to be particularly taxing. Still, even those without children may feel the effects of these changes, as they may suffer from Loneliness, a sense of purposelessness, and other negative repercussions on their wellbeing.

The great majority of workers' work experiences have been transformed due to COVID19. Organizations worldwide were forced to change their organizational structures and employment arrangements. Also increasing is the prospect of fractures within the various employee organizations. For example, there are disparities between those who can work from home and those who cannot, between those who remained on the payroll and those who were furloughed, and even between individuals working in different business units affected in different ways by the outbreak of influenza. There are several problems and possibilities presented by COVID-19 and prospects for future study, which this chapter aims to address (Zenker, S., & Kock, F., 2020). COVID-19 will have a wide-ranging impact, but we'll focus on employee adaptability and wellbeing as they negotiate the present work environment.

2. LITERATURE REVIEW

A common criticism of strategic human resource management research is that it fails to incorporate new, cutting-edge human resource management approaches or fails to do so on a conceptual level (or both). In light of COVID19, it will be necessary to revise present conceptualizations of human resource management techniques and high-performance work systems. The strategic human resource management research community should shift from categorizing human resource practices as "other," as has been far too familiar in previous studies. Instead, strategic human resource management research should progress toward a more sophisticated conceptualization and assessment of human resource practices, such as flexibility, job design, and so on (Boon et al., 2019).

Strategic human resource management academic research usually relies on a uniform view of the employee-employer relationship and a belief that HR practices used inside organizations are applied uniformly (Huselid, 1995). However, human resource practices are different depending on the role of the employee (Kehoe and Wright, 2013). For the first time, Lepak and Snell (1999) distinguished between different types of strategic human resource management for different kinds of employees. When it comes to strategic HRM, COVID19 emphasizes the need to consider how and where other employee groups execute their job to understand the influence of strategic HRM on each of these groups.

According to Dahles and Susilowati (2015), business resilience is demonstrated by an organization's capacity to wait for perceived normality to return while innovating and developing in the face of upheaval. Few research suggests that building human capital is essential for developing linkages between the other components that contribute to organizational resilience in a business environment (Hall et al., 2017; Nilakant et al., 2014). Organizational resilience developed through human resource practices has been a topic of interest for management scholars for some time (Lengnick-Hall et al., 2011;), but the literature on crisis management in the tourism and hospitality industries has yet to incorporate organizational resilience developed through human resource practices. If a business is facing a crisis, human resource management (HRM) can make two critical contributions: (a) strengthening operational capacity for crisis management; and (b) implementing interventional tactics to boost collective and individual organisational performance, thereby improving crisis responses (Gössling, S., Scott, D., & Hall, C. M., 2020; Wang et al., 2009). Prior research has demonstrated that, due to the crisis, organizations are increasingly turning to cost-cutting tactics rather than supporting the overall system. A combination of the following measures may be used: mass layoffs, decreased payroll, recruiting freezes, training curtailments, stringent performance management, and downsizing (Huselid, M. A., 1995; Santana et al., 2017; Teague & Roche, 2014). In other instances, organizations sought to enhance their capabilities rather than just decrease costs through cost-cutting measures (Sievert, H., & Scholz, C., 2017; Teague & Roche, 2014).

3. COVID-19 OUTBREAK

The COVID-19 pandemic first appeared in Wuhan, China, in December 2019. Early speculations suggested that this novel coronavirus may be related to a seafood market in Wuhan, China, but health officials are still looking for the actual source (Zhang et al., 2020). People who attended the market were infected with the novel coronavirus, which causes viral pneumonia in some people. The first known coronavirus case was discovered on December 1, 2019, by an individual who had no connection to the seafood industry, according to research published on January 25, 2020. The origin and propagation of this virus are still under investigation (L. Wang et al., 2020). The total number of confirmed cases worldwide is 1,57,35,754, and the total number of confirmed fatalities worldwide is 6,39,636 as of July 25, 2020, at 05:30 GMT+5:30. Cough, fever, shortness of breath, muscle pains, sore throat, and an inexplicable loss of taste or smell are COVID-19 symptoms.

A range of non-pharmaceutical procedures known as lockdowns has been implemented in several countries and territories throughout the world due to the COVID-19 pandemic, including the United States (including stay-at-home orders, curfews, quarantines, cordons sanitaires, and similar societal restrictions). These restrictions were put in place to help prevent the transmission of SARS-CoV-2, the virus responsible for COVID-19, from spreading. More than 3.9 billion people in more than 90 countries or territories will be advised or pushed to remain at home by the end of April 2020, representing about half of the world's total population. Compared to the hundreds of years that similar disease preventive techniques have been used, the scale of change experienced in the 2020s is expected to be unprecedented.

4. STRATEGIC HUMAN RESOURCE MANAGEMENT AND COVID-19

COVID-19's effects may be detected globally because of its enormous influence on health and social wellbeing and economic activity. It has a remarkable effect on everyone and everything. As social isolation, travel restrictions or bans, and lockdowns have become required measures to stem the exponential spread of COVID-19, organizations have been unable to carry out their normal activities (Crane, A. and Matten, D., 2020). To help flatten the coronavirus curve, organizations have been experimenting with alternative strategies, such as remote working. Because "contamination on surfaces handled by employees and consumers is a primary mode of COVID-19 propagation," managers are forced to cope with the problem as best they can.

As firms adopt the "Distributed Workforce" paradigm as their new standard, the job of human resource professionals will radically shift (Harney, B. and Collings, D. G., 2021). In a post-COVID-19 world, we will face unprecedented hiring problems and possibilities. Among the difficulties that human resource departments will have to address are the following:

- a) How will you weed through the enormous pool of jobless people who will be looking for work?
- b) In a candidate-saturated market, individuals will be more prone to "pad" their resumes or outright fabricate them. How will you examine candidates' credentials and guarantee that your hiring is not a false start?
- c) Will having more nimble workers help you hire in new regions outside of your present offices?
- d) How will you respond when certain workers request to work remotely full-time, now that they've demonstrated that it is possible?
- e) How will you manage morale and culture when your team is increasingly distributed?

COVID19, on the other hand, has heightened the importance of seeing employees as key stakeholders. COVID19 is, at its core, a danger to the health and safety of employees, necessitating the need for organizations to assess and mitigate employee risk (Collings, D. G., Nyberg, A. J., Wright, P. M., and McMackin, J., 2021). For example, some employees suffered due to corporations' persistent limited concentration on short-term financial objectives while failing to consider the needs of their employees. "As more instances of COVID-19 are reported worldwide, businesses implemented proper controls to prevent the virus from spreading within the workplace (Reza Nurul Ichsan, Khaeruman, Sonny Santosa, Yuni Shara, & Fahrina Yustiasari Liriwati., 2020). Businesses ensure that their business continuity strategies account for and prepare for biological threats to avoid this potential hazard. Employers are advised to consider the following preventive measures: Encourage sick workers to stay home, send symptomatic employees home until they can safely return to work, and require employees returning from high-risk places to telework during the incubation period. As is the case with any prevalent virus, bacterium, or other biological threat, companies should take safeguards to protect their employees and future operations. Companies closely monitor the COVID-19 pandemic, as directed by the World Health Organization, the UAE's National Emergency Crisis and Disaster Management Authority, India's national health agency, and the US Centres for Disease Control and Prevention. By implementing these critical processes and planning, companies have got some success in containing and preventing the spread of coronavirus."

5. EMPLOYEE ENGAGEMENT AND LOCKDOWN

The contemporary business climate is changing due to the global COVID-19 pandemic. Human resource managers are constantly devising innovative, imaginative, and successful tactics to keep their employees happy and more productive during these challenging times. Employee engagement is a work attitude that motivates everyone who works for a firm to put their best foot forward every day, committed to the organization's goal and values (Sievert, H., & Scholz, C., 2017). It is critical for businesses to remember that motivated employees are more productive, which results in higher customer satisfaction and, eventually, increased sales and profit (Basquille, M., 2013).

Engaging employees' families during the COVID-19 shutdown has introduced another element of complexity to organizations' efforts to engage their staff. Among the businesses involved in these efforts are Genpact, Accenture, Deloitte, AMD, and Hinduja Global Solutions. Talukar (2020) advocated for employee involvement during the COVID-19 epidemic. When working with a remote team, it's critical to establish a tighter communication regime, cheer them up immediately, and allow your staff to relax and be more adaptable. Additionally, you may host online team-building events. Companies such as CEAT and SAR boost their employees' downtime (Chanana, N, Sangeeta, 2020). Firms can keep their staff engaged during a shutdown by giving chances for learning and growth.

Additionally, some organizations make an effort to allay their employees' fears throughout the pandemic period to maintain a positive approach. Few businesses have hired personal trainers to motivate their staff and families during downtime—measures aimed at assisting staff in enhancing their capabilities during a lockdown. Organizations can empower digital personnel for the future by creating chances for learning, providing tools for continuous professional improvement, and motivating employees during this trying time. Firms must prioritize employee engagement during the COVID-19 pandemic (Goyal et al., 2020). According to the article, when employees have meaningful work and firms provide them with continual growth possibilities, they feel inspired and committed to their organization. Employees who work remotely are more likely to operate in a workplace that values new ideas. Employees' interest is piqued by engagement activities that inspire them to think creatively and generate novel ideas. Businesses must take proactive measures to maintain employee engagement during trying times.

6. EMPLOYEE ADJUSTMENT AND WELL BEING

This pandemic will unavoidably have a significant impact on the workforce. When government measures like social exclusion and self-isolation are implemented without a solution to the pandemic, fear and worry can become overpowering. If the situation persists, it can demoralize businesses that are predicted to go bankrupt. As a result, it becomes increasingly difficult for companies to maintain their workers' mental health and wellbeing regularly working from home (Kopp, D., 2020). It is imperative that HR managers revisit and revise their HRM strategies to ensure the wellbeing of their employees and so maximize their productivity in the face of pandemics and uncertainties. Even though many businesses and governments have established contingency plans and programs to safeguard the welfare of their employees, rapid change and in many cases, the delay in response toward the crisis can have a severe effect on employees' mental health and wellbeing (Miller, A. M., 2020). Despite all of these uncertainties ' severity, human resources management and what can be done during a worldwide crisis are still unknown.

While firms address the COVID-19 problems, they must also pay close attention to individuals who may be disproportionately impacted by recent workplace changes (Smith, R. A., 2020). Perhaps most significantly, the changes brought about by the present health crisis have already exacerbated the work-family conflict, which is defined as “a type of role ambiguity in which the role constraints emanating from the work and family domains are mutually incompatible in some sense.”

Recent years have seen an increase in interest in and implementation of family-friendly workplace practices such as flexible work arrangements, on-site childcare facilities, and perks such as childcare subsidy programs, among other things. Policies like these have been proven to be beneficial in preventing family-work conflict, especially among workers who work from home. However, if the present pandemic continues to spread, the likelihood of friction between the work and home spheres may become greater than ever. As a result of the widespread suspension of schools and childcare services, employees are having to deal with increased childcare concerns as well as constant concerns about the health and safety of family and friends, in addition to dealing with the increased strain that can result from the transition to remote working (particularly for those who are not accustomed to such autonomous work environments). With these increasing demands, the lines between work and family life have become even more blurred, making it more difficult than ever to establish appropriate work-family boundaries. Determining how severe family demands, more work autonomy, and hence self-responsibility affect employee productivity and wellbeing and strategies to reduce new family-work conflicts will be critical. Such as if and how extra organizational assistance other than emotional or instrumental support might help reduce family-work friction and maintain employee wellbeing. Informational support is one type of help individuals juggling work-family responsibilities will need more. Ongoing training and development opportunities to assist employees in adjusting to shifting jobs and responsibilities are examples of current types of support.

A recent study shows that self-affirmation treatments can help employees connect their beliefs and needs with changing settings (Tasselli, Kilduff, & Landis, 2018; McQueen and Klein, 2006), which may assist future research to solve today’s work-family conflict issues. Inductive techniques may also offer new and intriguing areas in the work-family conflict literature and give significant practical implications for organizations assisting persons dealing with acute work-life disruptions.

7. DIGITAL TRANSFORMATION AND HUMAN RESOURCE MANAGEMENT

The catastrophe brought on by the COVID-19 pandemic has once again demonstrated the insignificance of short-term performance due to human resource strategies in the long run (Pfeiffer, W.M., 2020). No one brought up the subject of performance during the lockdown. Instead, the emphasis was on resiliency, agility, and the ability to bounce back.

The crisis also provided a glimpse into how businesses may deal with the dualities of digital technology (Tuzovic, S. and Kabadayi, S., 2020). Across all industries, the crisis has expedited digitization, and we have all swiftly adapted to the new normal by embracing new technology while also accommodating their limitations. Human resources must at the very least address this question: “How can we in HR take use of the benefits of collective digital fluency to strengthen the digital products we deliver to the organization?” Human resource services quickly shifted all of their procedures online in many organizations. Every stage of the employee experience, from onboarding to training and performance appraisals, had to be redesigned for the digital age.

Some people were more successful than others in making the virtual transfer. Successful candidates were innovative in their out-of-the-box thinking and used current technology across functional silos to achieve success (Sverdlik, N., Oreg, S., and Berson, Y., 2020). To give an example, Next-door, like millions of other businesses, had to train the whole firm on operating in the new environment of “working from home” from one day to the next (Singh, D., Singh, A. & Karki, S., 2021). The human resources team leveraged their externally oriented recruitment system to transition all workers to a virtual, customer-centered in-house platform. Even though this necessitated content modifications, the framework and technologies were already in place.

Some firms went above and above to profit from the most significant degree of collective digital fluency witnessed in human resource procedures by taking an additional critical step (Vial, G., 2019). Because of the lockdown experience, they were able to better educate themselves by reflecting on and learning about the places, things, and people within their organizations that added value to their customers’ lives. Therefore, they applied this knowledge to develop new methods of value creation that focused on accruing rents through the value generated by human organizational capital rather than on decreasing the costs of those resources for the organization, rather than on decreasing the costs of those resources for the organization.

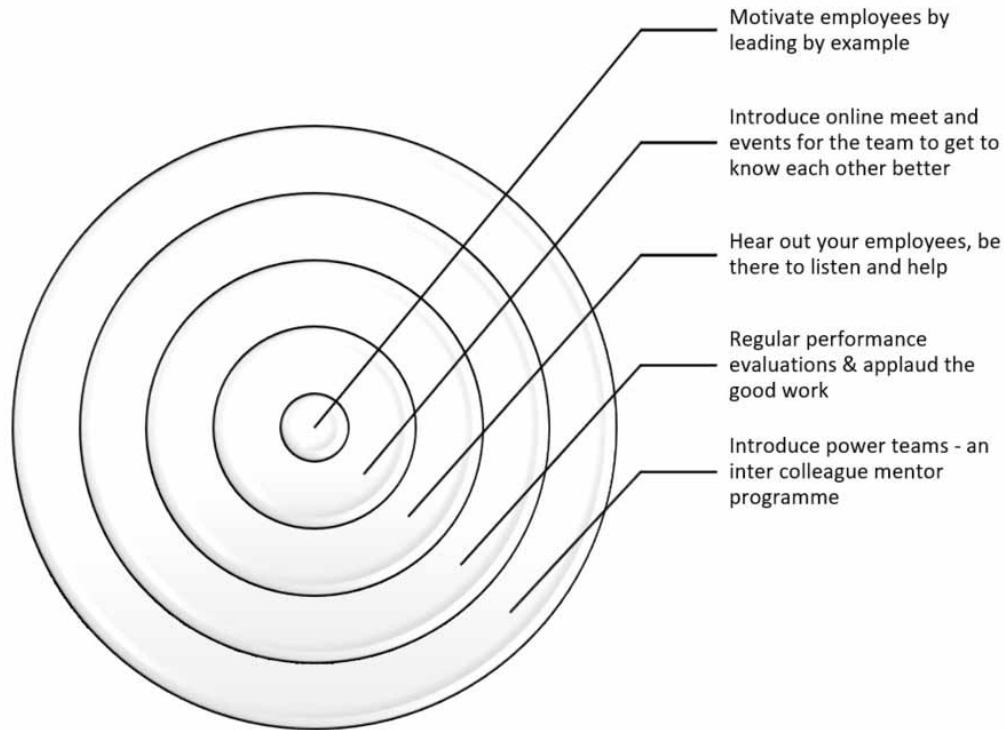
8. EMPLOYEE RETENTION IN COVID-19

Employees that are both happy and successful are critical to the success of any company. When a pandemic like COVID-19 occurred, the issue of staff retention became a major concern for businesses (Kuper, Simon, 2020). Companies were compelled to rethink their plans and implement new structures and methods to bring about a new version 2.0 due to a lack of confidence from the top levels of the organization, dismal data from around the world, and an almost overnight shutdown of nations.

Knowing that their boss is there for them and has their back is more critical than ever for the individuals that comprise an organization. There are several strategies for including and involving employees in essential decisions and soliciting their input to increase the agency’s employee retention rate (Shiva, Mehdi, 2020). Any company should strive to be open and honest in its communications. It becomes much more challenging to develop a community of like-minded people when most of the labor is working online. Agency best practices should be regularly updated to maintain a diversified, highly-skilled, non-political, and pleasant workplace for their employees in the future. One of the industry’s most significant issues is retaining staff (Sarmad, M., Ajmal, M. M., Shamim, M., Saleh, M., & Malik, A., 2016), particularly in the aftermath of a pandemic. The objectives and tactics are tailored to each organization’s management style and brand identity.

Figure 1. Employee retention technique

Source: Authors own compilation



a. Planned measures to keep workers' jobs during the first several months of the COVID-19 crisis in different countries

i. France

France permits companies to claim the health issue as a “force majeure”. Companies can apply for the plan retrospectively for up to 30 days after the first decrease in hours. If an application does not respond within two days, it is considered approved (down from the usual 15 days). There is now a 12-month maximum time limit for the program. To be eligible for this benefit, all employees with contracts (whether they are permanent or not) get 70% of their gross salary from their company. For most companies, the state reimburses them up to 4.5 times the hourly minimum wage in the COVID-19 crisis, so they don't face any costs for hours they don't work (OECD., 2020).

ii. Germany

Kurzarbeit was made more readily available in Germany. Firms would request financial assistance if just 10% of their staff is impacted by reduced working hours, compared to 30% before March 2020.

From Crisis to Resilience

Initial pay-outs include any real hours worked and 60% of the net earnings lost due to decreased hours (67 percent for employees with children). The state employment service reimburses employers for these payments and 100% of the social insurance contributions for the missing work hours (compared to a 50 percent reimbursement of social-insurance contributions during 2008-09). Employees on temporary contracts and apprentices are eligible for the subsidy extended to agency workers at the beginning of this economic crisis. In April, the government increased the statutory replacement rates for lost wages to 70 percent from the fourth month and 80 percent from the seventh month forward (77 percent and 87 percent for employees with children). In addition, the limits on obtaining a second job while on STW have been removed. – Since total income cannot exceed prior income, workers can accumulate extra earnings and STW benefits. Unions and employers in several industries have agreed to more excellent replacement rates of up to 90% (OECD., 2020).

iii. Italy

Italy's STW (Cassa Integrazione Guadagni) initiative has broadened its scope by accepting applications from enterprises of all sizes and sectors. Businesses might simply say that the COVID19 issue has damaged them without giving thorough evidence. They must apply within four months after the initiation of the activity restriction, and compensation will be retroactively given beginning late February 2020. Nevertheless, some projected new beneficiaries have experienced difficulties with enrollment and timely help. Employer contributions to the scheme's expenditures have ceased, while employee benefits remain unchanged. Benefits are capped at 80% of gross salary and begin at EUR 998 for earnings up to EUR 2 159 and EUR 1 199 for earnings over that amount. When hours are cut to zero, a person earning an average wage has an effective replacement rate of roughly 45 percent (OECD., 2020).

iv. Japan

The Employment Adjustment Subsidy (EAS) in Japan has been widened and reduced eligibility restrictions. The Employment Adjustment Subsidy mandated a 10% cut in production for more than three months before the crisis, although that has since changed. Over a month, this has dropped to 5%. Small and medium-sized enterprises (SMEs) in Japan receive a subsidy of up to 100%, whereas big corporations receive a subsidy of up to 75%. The maximum benefit for larger companies was increased by 80% in May 2020. (from JPY 8 330 to JPY 15 000 a day per employee). Those who aren't insured by employment insurance can now participate in the program. Even though many SME companies have reduced their hours, the government has launched a new program to compensate workers who remain unsupported because they have not filed for subsidies. These workers will be able to apply for the new plan immediately and be covered for 80 percent of their average salary (OECD., 2020).

v. United States of America (USA)

About 70 percent of the population in the United States is covered by Short-Time Compensation (STC) programs in 26 states. The federal government currently pays 100% of STC payments in states that already have a program in place and 50% in those that adopt a new one, thanks to the CARES Act. STC recipients are also eligible for the weekly USD 600 benefit increase given to all unemployment benefit recipients for the next four months. There are many reasons why STC use is so limited, includ-

ing administrative bottlenecks, the lack of employer awareness, weak financial incentives for employers (employers are liable for their part of social-security contributions for hours not worked), and limits on the maximum reduction in working hours. Paycheck Protection Program (PPP) and the Employee Retention Tax Credit (ERTC) were created by the United States to address these issues (ERTC). During the COVID19 crisis, PPP supports small firms with loans to pay their staff, regardless of their revenues, which are forgiven provided employment and remuneration levels remain stable. ERTC is accessible to companies that have experienced a revenue decrease of more than 50%. Whether or not a company employs more than 100 people, it receives a refundable tax credit of 50% of its employees' salary. Credit is only accessible for workers who are not employed during the crisis in larger companies. There is a cap of USD 10,000 on the total amount of credit that may be taken out (OECD., 2020).

9. CONCLUSION

In today's pandemic situation, employee engagement is critical because of COVID-19. In the current state of lockdown, it would be a pipe dream to consider ascending to the top without the support of your employees. In this challenging economy, businesses clearly understand the importance of having engaged employees. In a pandemic, companies should aim to keep their employees happy and engaged by involving them in their work. Establishing employee engagement measures using technology is essential for the growth of organizations now. Engaged employees are always able to meet their goals quickly and easily. To foster a positive corporate culture, management also looks into engaging employees. It is also essential for organizations to understand the various factors motivating and inspiring employee engagement. Organizations have been experimenting with remote working to reduce the coronavirus curve. To deal with the problem, managers must do everything they can to prevent contamination on surfaces handled by their employees or customers from spreading the COVID-19 virus.

On the other hand, when employees work from home daily, it becomes increasingly challenging for organizations to maintain their mental health and wellbeing. In the face of pandemics and uncertainty, HR managers must examine and adapt their HRM strategies to protect the wellbeing of their staff and, therefore, maximize their productivity. Strategies like digital transformation and employee retention came as a savior for the organization and its people during this challenging pandemic.

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KEY TERMS AND DEFINITIONS

Cassa Integrazione Guadagni: A special public fund that is sponsored by businesses and the state and overseen by the National Institute of Social Insurance (INPS) is used to preserve employees' income.

Force Majeure: Factors beyond one's control that prohibit someone from performing a contract.

Kurzarbeit: Is a kind of social insurance in which businesses cut workers' working hours rather than lay them off.

Chapter 6

Recruitment During a Pandemic: New Ways of Facing the Job Market?

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ABSTRACT

This study aims to analyse the impact of COVID-19 on the recruitment processes, more specifically, to understand the types and forms of recruitment practiced by companies, how they were affected by COVID-19, and what procedures were adopted during the pandemic. It also aims to identify the most valued soft skills and the future perspective in terms of recruitment in a post-pandemic period. The study was carried out using a qualitative methodology based on seven structured interviews with HR managers from Portuguese companies. The analysis of the interviews concluded that external recruitment is the most identified option in both periods before the pandemic and during. External recruitment favours social and professional networks, especially Facebook and LinkedIn. Respondents assumed that, in both phases, the use of job search websites is the most successful external recruitment technique. In relation to soft skills, with the pandemic, companies began to particularly value flexibility and resilience.

INTRODUCTION

The impact of covid-19 has been severely felt in the economy of countries around the world. Many companies were forced to close or reduce their operations, and those that continued to operate have entered a scenario of change and new processes, where their practices are influenced by social distance and altered work patterns (Leidner, 2020; Richter, 2020). In the Portuguese case, the containment measures

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announced by the Government for the maintenance of public health, have strongly affected the behavior of economic agents on both the supply side (interrupting the normal operation of companies and leading, in some cases, to closures temporary) as well as on the demand side, reflecting the general duty of confinement. In consequence, for instance, in the second trimester of 2020, Portugal has evidenced a significant and expressive drop in what regards companies' activities and production, particularly, in the hotel business sector (Manteu, Sequeira and Monteiro, 2020). The way how organizations have rearranged work locations, as well as the way of doing business was noticeable.

The pandemic has brought changes regarding recruitment processes in organizations, with a transition to virtual forms of recruitment and selection to the detriment of face-to-face interactions (Maurer, 2020), thus giving rise to a different way of attracting individuals, in comparison to the traditional one. The use of social technologies and digital media (blogs, social networks) came to help in this regard, where they began to be used creatively in brand marketing and communication (Fournier and Avery, 2011; Hanna et al., 2011), and currently, there is a greater awareness and focus on digital media in recruitment and selection processes (Nikolaou, 2014). It is therefore important to understand how these practices will impact the future fabric of the values and culture of organizations, raising the question of whether they could attract individuals differently from the traditional face-to-face approach.

This study seeks to analyze the impact of Covid-19 on corporate recruitment. More specifically, its main objectives are to understand the types and forms of recruitment practiced by companies, how they were impacted by Covid-19, and what measures were adopted during the pandemic for companies to continue their recruitment processes. An attempt was also made to identify the most valued soft skills among employees, taking into account the changes in the context and the future perspective in terms of recruitment processes in a post-pandemic period. In methodological terms, a qualitative methodology based on structured interviews with HR managers of Portuguese companies from different sectors will be used.

RECRUITMENT AS A KEY AREA OF HRM

According to Milkovich and Bordreau (2000), the recruitment and selection processes mobilize potential employees into the organization, in order to determine a group of people with the desired dimension and specificity, with the primary objective being to reach only potential candidates. As observed by Limongi França and Arellano (2002), the recruitment and selection process corresponds to procedures that presuppose responding to the need to fill open vacancies, that is, to the need to hire personnel. Thus, the recruitment and selection processes constitute tools that can be used in the integration of the organizations' business strategy (Limongi França and Arellano, 2002), and the role of recruitment is to attract job candidates (Ribeiro, 2005). The recruitment process begins globally with internal research, which is equivalent to a justification of the organizations' needs according to their HR characteristics, in the short, medium and long term, revealing what organizations need immediately and what their goals of future growth and development are. This internal and planned research is constant and continuous. The second stage refers to an external research, characterized by carrying out an HR market research with the intention of guiding and differentiating you in order to promote your analysis and approach. In this way, the external research integrates two important aspects, namely, the orientation of the HR market and the meeting of recruitment sources. Finally, after conducting the internal and external research, it

is essential to select the recruitment techniques that are most recommended for each case and study the means, that is, the sources of recruitment that best meet the organization's needs.

It is necessary to take into account the procedure to be followed for the recruitment process to be successful. Starting with the recruiter's objectives, underlying the HRM process, recruitment presupposes reaching several purposes (Rocha, 2006), namely, attracting a sufficient number of candidates fitting the desired profile, thereby enabling the correct functioning of the selection process; relate recruitment to staff turnover, promotion and firing; manage the sufficient number of qualified people for the jobs with the least possible costs; make the process more efficient at an individual and organizational level in the short, medium and long term, so that each one uses, in an appropriate way, their skills, training, competences and motivation; reduce the possibility of abandonment by recruited candidates; comply with current legislation; and, finally, evaluate the effectiveness of the techniques/recruitment sources used.

Recruitment can be internal, external or mixed, and each of these types has advantages and disadvantages for the recruitment process itself and for the company. Starting with internal recruitment, this is characterized by the organization looking for a collaborator for a certain place within the range of workers of the company itself (Chiavenato, 2007), where the internal search for candidates can take place for all areas and levels, in short, medium and long term (Chiavenato, 2007) and usually occurs in cases of transfer or internal functional promotion. For Chiavenato (2002), internal recruitment can benefit from some advantages, such as the promotion of internal workers, worker development programs, transfer of workers and transfer with promotions of workers and career plans for workers. However, according to Ribeiro (2005), there are other significant advantages, namely, good professional performance, savings in expenses with fees and employment agencies and advertisements. According to Lodi (1976), internal recruitment is the most coherent resource, as it is the most immediate and cheapest source of recruitment, where there is the possibility of obtaining more concrete information about the "candidates". This is due to the fact that previous performance is already known through an evaluation system, encouraging promotion, improving internal morale and specializing in public relations with employees. On the other hand, internal recruitment can also present disadvantages, namely, limitation to the organization's policies and guidelines, conflicts of interest and difficulty in bringing new ideas and experiences into organizations (Chiavenato, 2002).

Regarding external recruitment, this occurs when an employer opens a certain vacancy and tries to fill it with people who are not part of the organization, that is, external candidates (Chiavenato, 2009). This type of recruitment can be divided into direct and indirect and is said to be indirect when the organization chooses to contact companies specialized in the area and direct when this is carried out by the company itself (Câmara et al, 2007). The advantages of this type of recruitment include the introduction of new blood into organizations (talents, skills, and expectations), enrichment of human assets and increase in intellectual capital by including new knowledge and renewal of the organizational culture. A more negative perspective is that of Lodi (1976), who states that external recruitment can mean, in companies, high staff turnover or a lack of motivated workers who deserve to enter an internal appreciation program.

The literature presents several more traditional external recruitment techniques: (1) Advertisements in Newspapers or Magazines; (2) Recruitment Agencies; (3) Universities; (4) Spontaneous applications, etc. (Chiavenato, 1999, 2009; Cenzo and Robbins 1999).

RECRUITMENT ON SOCIAL AND PROFESSIONAL NETWORKS

The use of social technologies and digital media (blogs, websites, social networks) were initially introduced and used creatively in brand marketing and communication (Fournier and Avery, 2011; Hanna et al., 2011), but the adoption of social media in recruitment and selection processes is increasingly common (Nikolaou, 2014). HR professionals are increasingly using social media to screen and select candidates (Nikolaou, 2014; Smith and Kidder, 2010), to verify information provided by candidates (Levashina, 2009), or simply because of the media's accessibility to candidate information at a low cost (Jacobs, 2009). From a recruitment perspective, the media is also used as part of a communication strategy to promote the employer brand image (Sivertsen et al., 2013; Carrillat et al., 2014) and studies show that a brand image favourably affects the recruitment outcome (DeVecchio et al., 2007). The mere presence in the media positively affects corporate reputation, which again positively affects the attractiveness of the employer, and which is positively correlated with the job intentions of candidates and their expectations regarding the company with employment opportunities (Sivertsen et al., 2013; Carrillat et al., 2014).

Regarding LinkedIn, this is a social network that focuses on professional networking and career development, having been designed to help people make business connections, share their experiences and CVs and find jobs (LinkedIn, 2019). LinkedIn is a professional social network seen as an important recruiting and selection tool. It is through LinkedIn that recruiters are able to manage the competitive process and the time spent finding the ideal individual for the position and for the organization (Florea and Badea, 2013). The social network Facebook, on the other hand, has the ability to reach populations in all geographic locations, and user demographic information and data are at the heart of its recruitment application (Burbary, 2011). Park and Calamaro (2013) highlighted the main benefits of Facebook such as ease of use, low cost and effectiveness in recruiting candidates.

COVID-19'S IMPACT ON RECRUITMENT

Due to the pandemic, it was found that, as organizations must transition to virtual forms of recruitment and selection rather than face-to-face interactions (Maurer, 2020), it will be increasingly important to understand how these practices will impact the future fabric of values and culture of organizations, as these new practices could certainly attract and retain individuals differently from the traditional face-to-face approach. However, the transition to virtual recruitment can affect the ability of HR managers to develop and assess perceptions of suitability regarding the effectiveness of virtual assessment centers and training programs. And given the pandemic situation, the future need of organizations may be online advertising and recruitment, thus protecting the organization's activities and keeping employees safe. Indeed, reports from the Pew Research Center show that 95%, 90% and 82% of individuals aged 13-17, 18-29 and 30-49 years, respectively, use some form of social media, leading to a wide reach for online advertising and recruitment.

According to KPMG research, in 2019, HR specialists plan to invest in more specific HR technology that improves HR analytics and enables more HR automation in the next two to three years. Sixty percent also agree that embracing these new technologies will require a significant shift in roles within HR (KPMG, 2020). In fact, this plan has gained importance since Covid-19 appeared and, for example, interviews via videoconference rose from 22% in 2019 to 58% in 2020 and 2021. In this perspective,

organizations are starting to look for ways to learn more about candidates when other face-to-face methods are no longer available (McKinsey, 2020).

Technology is a key tool for faster, cheaper, and better delivery of HR services and, in some cases; it can have a transformative character as well as a negative effect (Thite, 2019). The various online tools are advantageous on the one hand, but they can also have their downside. In this perspective, employees may be forced to shift focus from a platform, application or project, threatening productivity and collaboration.

METHODOLOGY

Discuss future and emerging trends. Provide insight about the future of the book's theme from the perspective of the chapter focus. Viability of a paradigm, model, implementation issues of proposed programs, etc., may be included in this section. If appropriate, suggest future research opportunities within the domain of the topic.

Research Questions

This study aims to analyze the impact of the Covid-19 pandemic on Recruitment and was carried out in companies in the central region of Portugal. In order to respond to the research objective proposed here, the following research questions were formulated: (1) Types and forms of recruitment practiced by companies? (2) Type of impacts of Covid-19 on the recruitment processes and professional routines of HR managers and their employees? (3) Procedures established in recruitment processes during and after the pandemic?

Data Collection

The methodology considered to achieve the proposed objectives is qualitative. In this context, structured interviews were conducted with HR managers and content analysis was used as an analysis technique. Theoretically, content analysis has undergone extensive changes, resulting in a more interpretive approach within the qualitative paradigm (Schreier, 2012; Egberg-Thyme et al., 2013; Lindgren et al., 2014).

Within the scope of this study, the main objective of the interviews is to understand the new reality in relation to recruitment due to the pandemic situation that has taken place. The issues described in the guide relate three distinct phases in the lives of companies aimed at recruitment, namely, the phase before the pandemic, the phase during Covid-19 and future perspectives of companies after the pandemic situation. In the three sections of the guide, questions are presented about the types and techniques of recruitment adopted, tools used to facilitate distance work, soft skills valued before and during the pandemic in recruitment and future prospects for it.

Sample

Seven HR Managers from companies in the central region of Portugal (Leiria and Marinha Grande) that are experiencing the Covid-19 pandemic situation, were interviewed. The managers interviewed are from different sectors of activity (food, automobile, construction, plastics, health, technology, glass), being mostly female (6 female respondents, 1 male) and have different years of service (average of 11

Recruitment During a Pandemic

years). Their academic qualifications range from a bachelor's degree and a master's degree (in areas related to HRM).

ANALYSIS AND DISCUSSION

It was possible to verify that the companies did not change the type of recruitment adopted during the pandemic crisis. Namely, there were no considerable changes regarding the option between internal or external recruitment, when one of these processes or both proved to be necessary. The testimonies of respondents from various sectors demonstrate this finding:

“The company’s preferred and most advantageous recruitment is external recruitment, as it is more direct, economic (in the sense that in external recruitment we use unpaid sources to attract candidates and internally and externally the cost is considered similar. Internal recruitment triggers an external recruitment and in the latter, we can always have more choices) and customized to the company (in the conscience of HR technicians)” – (Interviewee - Food Sector)

“In the case of positions that are easy to fill (more basic) internal recruitment is preferable, as there is less learning time for the employee, not requiring a lot of training as they already have enough knowledge in the company. External recruitment is also beneficial in that it brings new mindsets to the company. Basically, external recruitment is the most advantageous for some more specific positions due to the greater demand in professional experience and a more advanced academic degree” – (Interviewee - Plastics Sector)

“Direct referral is more advantageous, as there is already a great deal of knowledge about the company, as indicated by current workers.” - (Interviewee - Glass Industry)

“(…) internal recruitment is advantageous in the sense that people are known (qualities and faults), there is greater simplicity, the organizational culture is ensured (work method, training and appreciation of merit, progress). But on the other hand, external recruitment is also advantageous as it brings people into the organization with more vision, “out of the box” ideas, new experiences, new feelings, since the average age of the company is high” - (Interviewee - Construction Sector)

“In percentage terms, it is external recruitment, as more people arrive through this type of recruitment through LinkedIn and Facebook.” – (Interviewee - Technology Sector)

“We don’t use internal recruitment, just in the case of internal mobility. Moreover, for more specific positions we use external recruitment, which reaches more people due to the fact that they are very specific areas to find in the job market (e.g., pharmaceuticals)” – (Interviewee - Health Sector)

“Depending on the situations, in most cases it is not possible to resort to internal recruitment, as all the jobs are occupied, and the transfer of a job internally always ends up triggering the need for external recruitment.” – (Interviewee - Automobile Sector)

From the interviewees' responses, it appears that internal recruitment is not an exclusive option. This type of recruitment can trigger an external recruitment process, due to the mobilization for another position, leaving the previous one without a professional. It is justifiable by the interviewees to defend that external recruitment brings several advantages, such as introducing "new blood" to organizations, it has a greater reach, it is more successful for more specific positions, there is very easy and quick access to social networks without depending on third parties (e.g., agencies), increasing the age scale within the business. There is also the possibility of good external references and the use of highly popular job websites.

In the case of internal recruitment, the interviewees presented two situations before and during the pandemic, namely the change to a higher position and the addition of new responsibilities to the existing position in most cases. Hence, there is the need for external recruitment in these cases in which there is a change of position, and the old position has to be filled by a new professional.

With regards to the perspective of external recruitment through social and professional networks, the most used for disseminating job offers and searching for candidates seem to be Facebook and LinkedIn, for the reasons mentioned below:

"Facebook is a very practical social network to recruit for more operational positions" – (Construction Sector)

"LinkedIn is good for recruiting for top positions, since the entire candidate's professional training is described. For more operational positions, Facebook is more directive" – (Food Sector)

"Facebook is a social network with the greatest population coverage. On LinkedIn it depends on the vacancy in question, as many people do not have the social network, so do not have great access to vacancies published by the company, and is more used by structure personnel" – (Plastics Sector)

"LinkedIn is a social network which totally dedicated to real professionals" – (Glass Sector)

"Facebook is good for more operational functions" – (Construction Sector)

"LinkedIn is a professional network" – (Technology Sector)

"We consider Facebook to be effective, but not the most successful, as we have never finalized any recruitment in this way" – (Automobile Sector)

It was also found that the use of social and professional networks varies depending on the specificity of the position for which one is recruited. Facebook is a very comprehensive network, but more effective and functional for more operational positions, while LinkedIn, being a professional and specialized network, is quite advantageous and effective for top positions, which require more specialization at a professional and academic level.

It was also possible to verify that the use of social and professional networks in disseminating job offers and searching for candidates during the pandemic situation was also verified. For the same reasons as above, once again, LinkedIn and Facebook were the options with the greatest visibility, and there are

Recruitment During a Pandemic

also those who consider WhatsApp to be an effective ally in the recruitment and selection processes for the following reason:

“WhatsApp is a good source of recruitment because of the video calls for later interviews” – (Health Sector)

Interviewed companies recognised that the use of job websites is the most successful external recruitment technique, in both phases, before and during the pandemic. The use of databases and spontaneous applications are also considered good options, before and during the pandemic, in order to reach some candidates who were not included in previous stages of recruitment, thus attracting a greater number of candidates in a recruitment process. Thus, job websites, databases and spontaneous applications, both before and during the pandemic situation, were the most used sources according to our interviewees. In the use of job websites, the most popular platform for job postings among the companies interviewed was NetEmpregos, as it is one of the digital platforms which is most visited by candidates.

Regarding the relevance of soft skills, before Covid-19 emerged within organizations, respondents say they valued the following soft skills in their employees and recent hires: flexibility, planning ability, problem solving, resilience, ethics and communication. The following are some testimonies:

“They are essential pillars for the development of effective work” – (Food Sector)

“They are necessary skills in the 21st century, due to constant change”; “gaining resilience is not always easy”; “(...) good communication to clarify problems and consequently the resolution of conflicts”; “(...) and creativity in the sense of thinking outside the box” – (Glass Sector)

“(...) there are more and more new challenges, requiring agility and responsibility on the part of employees” – (Construction Sector)

“If the team has these skills, it will be stronger, competitive and distinctive in the market compared to the competition (not only technical skills matter)”; “Adaptation to change, ability to work in a team and love for learning” – (Technology Sector)

“It is important to communicate with users so that they understand well what they have to do, where, what to take, especially the elderly who want a lot of attention and that we have as clear communication as possible” – (Health Sector)

In the pandemic phase, the HR managers interviewed assume that they have come to value flexibility and resilience much more. Companies thus try to bet on behavioural skills, due to the unpredictability of the pandemic, where the physical and psychological effort requires a new adaptation to try their best to have a positive work environment with the support of all employees. The justifications below show this:

“Be more flexible in terms of hours (day and night)”; “Critical thinking is very important in this adaptation phase in which we live, and it is crucial for employees to be able to come up with ideas to improve” – (Health Sector)

“(…) during activities and in unpredictable situations that the pandemic can provoke”; “Times are not always easy. (…) the new realities of work or teleworking. (…) if the realities can change, then the deadlines also change as a consequence. (…) being aware of difficult times are only overcome with intra and interdepartmental cooperation” – (Plastics Sector)

“(…) teams support each other a lot, team spirit is important” – (Construction Sector)

“The positive points must be highlighted to overcome the pandemic situation and not let the company fall” – (Food Sector)

“We highly value positivity at this phase in which we live” – (Technology Sector)

“The pandemic has led to changes in the internal organization, forced by adaptation to circumstances, so that employees with greater adaptability, greater positivity and greater team spirit are able to contribute to overcoming obstacles that the pandemic has created, thus helping the colleagues and companies to surpass them” – (Automobile Sector)

The challenges in terms of recruitment processes arising from the pandemic situation are immense. The sudden replacement of employees in the event of an infection poses a great challenge for companies. The lack of candidates that the pandemic situation can provoke and the uncertainty in candidates regarding working conditions are also concerns for both companies and candidates. Below are some of the responses from HR managers that address these concerns:

“In case an employee has Covid-19, it is necessary to replace that employee during the time they are in quarantine and if the cases of Covid-19 are very high in the organization, the concern to replace employees can be difficult” - (Food Sector)

“The lack of interpersonal and face-to-face contact makes it difficult to perceive the behavioural analysis of a potential candidate” – (Plastics Sector)

“ Some potential candidates are afraid to accept a given proposal in a context of uncertainty, due to uncertainty of the company or the volatility in the workplace, that is, people who are very receptive to leaving where they are and going to another company ” - (Glass Sector)

“(…) unemployed candidates who do not want to work in a pandemic context” – (Construction Sector)

“The difficulty of communicating with candidates due to the fact that interviews are carried out remotely via Teams and when conducting the face-to-face interview, the use of a mask does not allow the recruiter to evaluate the candidate properly” – (Automobile Sector)

With the emergence of Covid-19, organizations have had to change their ways of working, according to the law, in different sectors. Of the seven companies interviewed, six resorted to total and partial layoff and teleworking in some situations. Depending on the sector of activity, some companies closed within a period of one to two months, others acquired a work regime in a hybrid model (half of the time

Recruitment During a Pandemic

in teleworking mode, the other half in face-to-face regime) and others in which there was no change whatsoever.

“We used layoffs in hotels and restaurants and partial teleworking in the first wave. In the second wave we didn’t use the teleworking mode” – (Food Sector)

“In the construction sector, companies did not want to work under pandemic conditions, leading to layoff and we adopted partial telework for back-office employees” – (Construction Sector)

Imagining the future of companies in terms of recruitment can be a great challenge. It is difficult to predict, not knowing whether there will be a setback in the pandemic situation or the emergence of a new pandemic that will radically change the business reality once again. For this reason, companies are beginning to consider adopting preventive measures for the future in order to take precautions in case a new situation arises that prevents the organizations from functioning normally. According to the justifications below, it is possible to foresee how the new business reality will be, with regard to recruitment in particular, in a post-Covid-19 scenario.

“In a post-Covid-19 setting, there will be a high restriction on physical contacts between recruiters and candidates. For this reason, recruiters will continue to adopt virtual channels for recruitment interviews (videoconferences) and questionnaire submission” - (Food Sector)

“It is probable that whenever possible, candidates and companies will feel more comfortable with the online interview modality, in order to avoid travel. It will be necessary to explore new ways of evaluating the competencies of a potential candidate without the face-to-face regime.” - (Plastics Sector)

“The strategies to attract candidates will be maintained using social networks. But face-to-face interviews can be considered” - (Construction Sector)

“The future of recruitment will involve the adoption of a hybrid model divided between face-to-face and distance recruitment. It may be considered a possibility to hire people in different locations (even without an associated company office) due to the prospect of teleworking. Some recruitment stages before the pandemic were face-to-face and will now be virtual, such as the first interviews.” - (Technology Sector)

Many companies, after experiencing the pandemic situation, seem to be inclined to consider a hybrid operating model, combining telework with some trips to the workplace, defending that it is a fairer work model. This opinion is the majority among the HR managers interviewed. However, depending on the business area, full face-to-face work is again an option. Rotating hours (mirror work) are also an alternative to avoid large numbers of people in companies, especially in large companies.

CONCLUSION

The emergence of the Covid-19 pandemic has become the most “popular” topic for the worst reasons in corporate life. Due to the uncertainties that the situation has created, economic losses and jobs have become the biggest concerns, both for companies and for the workers themselves.

Based on this new reality, it is possible to compare the forms of work before Covid-19 and the new work reality in a pandemic scenario. Issues such as teleworking, flexible hours, different ways of working, new work rules and procedures, adoption of new technologies and recruitment and selection processes adjusted to the new reality, are relevant and current issues.

In this study, the content analysis of the interviews carried out with seven HR managers from companies belonging to different sectors, led to the conclusion that external recruitment is the most identified option in both phases, both in the period before and during the pandemic. The reason given is that internal recruitment can trigger, in most cases, an external recruitment process, due to the mobilization for another position. Thus, external recruitment has advantages such as: injection of “new blood” into organizations, greater reach, greater success for more specific positions, easy and quick access to social networks, increased age scale within the business, possibility of good external references and use of popular job sites. This option prevails before and during the pandemic, where external recruitment favours social and professional networks, especially Facebook and LinkedIn. In both phases, Facebook appears to be more functional for more operational roles, while LinkedIn appears to be quite effective for top jobs. Respondents assumed that, in both phases, the use of job sites is the most successful external recruitment technique through the NetEmpregos platform. For practitioners, our data seem to support the idea that the use of databases and spontaneous applications are good alternatives in terms of reaching candidates who are not included in previous recruitment stages. Recruiters should be aware that having large databases with prospective candidates in consecutive follow-up may constitute an advantage for rapid job market’s movements. Social media management tools may be a very insightful way of reaching out the job market and to support both mid-range skills, as well as high-range skills assessment.

Regarding soft skills, before Covid-19, respondents valued soft skills such as flexibility, planning ability, problem solving, resilience, ethics and communication in their employees and recent hires. With the pandemic, companies began to place much more value on flexibility and resilience, skills that could be associated with the unpredictability of the pandemic.

These companies, after experiencing the pandemic situation, are considering a future based on a hybrid model, between teleworking and face-to-face work, arguing that it is a fairer work model, with full face-to-face work being again an option. Rotating schedules (mirror work) are also an alternative to avoid gathering people in companies. In taking the concerns of employees into account, they will value time flexibility, encouraging greater availability for the family. For practitioners, reaching employees with such skills may become prevalent for immediate and short-term job markets movements, and as such, recruiters should see these competences as top importance ones when it comes to applications assessment and skills evaluation. These competences may become highly valuable to competitive job markets.

The adoption of virtual channels for selection interviews will continue to be an option for companies. However, companies may also choose to adopt a hybrid model of the recruitment and selection process in the future, balancing face-to-face and remote moments.

Limitations and Future Studies

This study has some obvious limitations as it is a recent and unpredictable topic in society and companies. The main limitations of this study are due to the reduced number of interviews and the varying interpretations of each respondent to the questions asked. It should also be mentioned that the pandemic context in which we live created some difficulties in terms of the availability of HR managers, in the sense that there was no possibility of conducting more interviews or adopting a face-to-face format (videoconference resource).

In terms of future research, it would be interesting to analyze the impact of new technologies on virtual recruitment. To what extent will the use of technology benefit recruitment in companies so that it is faster and more targeted towards professionals. A second possibility of research would be to understand which are the most relevant contents to appear in job advertisements to attract a junior profile or a senior profile in recruitment processes, during the COVID period, when compared to a post-COVID period.

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Chapter 7

Human Resources Management's Predominant Role in the COVID-19 Crisis: Making a Difference via Flexi-Time and Flexi-Space Working Solutions

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ABSTRACT

The COVID-19 pandemic changed existing and future work settings by putting flexible working options on the business agenda. The transition to flexible working has been a painful process for some organizations while integrating it into daily work practices has been relatively straightforward for others. This chapter will display data from a project carried out in Turkey during the lockdown period. The qualitative phase highlights the crucial role of human resources management in sustaining the employees and organizations under the conditions of pandemics. In this regard, the chapter will elaborate how human resources management functions adapted for a smooth transition to flexi-time-space models based on the experiences of 27 local and global organizations in Turkey. Digitalization and transformation of human resources functions, employee engagement and internal communication, performance management and employee-manager interrelations emerged as the master themes to scrutinize the ground-breaking shift to the alternative ways of working triggered by COVID-19.

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INTRODUCTION

As the Covid-19 caught us off guard in a business-as-usual environment, companies began to look for new ways to continue their operations. Therefore, flexible working has become the most common practice in the context of the pandemic (Glaude et al., 2020) and has begun to attract the attention it deserves. The flexible working methods such as reduced hours, home office design, and teleworking were supported and encouraged as new ways of working in the new normal (CIPD, 2020; ILO, 2020). As a result, organizations had to move from a traditional work arrangement to a system of remote working as part of their plans to maintain business operations; they opted for working from home to prevent illnesses and protect employees (Gössling et al., 2020; Işık & Güney, 2020; Kraus et al., 2020). Although working from home is unsuitable for some job profiles and organizations, it became a crucial solution to ensure business continuity and combat the health threats during the Covid 19 epidemic (Messenger, 2020). Flexible working practices, in general, is considered a solution to increase the work-life quality, prioritize sustainable organizational operations, increase mobility and adaptability according to changing global conditions like a crisis, war, epidemic, and cyber-attack (Ateş & Çöpoğlu, 2015).

As shared in Time Magazine in February 2020, “The coronavirus outbreak has become the world’s largest work-from-home experiment,” and the virus even provided the opportunity to test the work-from-home theory on an enormous scale. In their study, Barrero, Bloom, and Davis (2020) questioned why work from home will be permanent through the survey conducted with 15,000 people living in the United States and reported that working from home during the Covid-19 pandemic was evaluated more productive than pre-pandemic era work in the office. In addition, Gartner’s research with 127 company leaders representing human resources, legal, compliance, and finance functions revealed that 80% of company leaders plan to allow employees to work remotely at least for certain times after the epidemic, and 47% of them say that they will allow their employees work from home full-time (Gartner, 2020).

Flexible working’s individual, environmental and economic impacts vary depending on how well organized and managed. The work-private life conflict may increase with flexible working (Torlak & Işık, 2021), new technologies demanding additional time from employees may increase techno-stress by harming psychological well-being, and working alone may cause isolation (Carnavale & Hatak, 2020). Hence, analyzing and maximizing the fit between the flexible structure and employee characteristics would support psychological well-being during flexible working (Işık, Yenisey, & Kantur, 2021). According to recent studies, the Covid-19 pandemic has shaken the business world and affected the motivation, commitment, performance, business continuity, and flow of organizations and employees (Caliguri et al., 2020; Carnevale & Hatak, 2020; Palumbo, 2020; Vnouckova, 2020). Job insecurity and increased work and family stress became more prominent, jeopardizing employees’ engagement and well-being (Kumar, 2021). Increased job insecurity turned out to be one of the major topics in the pandemic phase, especially while working away from the workplace. Sudden changes and transitions to remote work also created stress and anxiety in employees (Como, Hambley & Domene, 2021).

Therefore, human resources management (HRM) professionals have to find balanced solutions to the demands of businesses, leaders, and employees very rapidly in this process. Although flexible working practices have been used in some businesses before the pandemic, many organizations experienced it first. While the shift to remote working during the pandemic has been a must to keep the operations going, it appears to continue shaping today’s business life and future work. Therefore, researchers of the current chapter wondered the responses to the following questions: How did the organization transform their operations and HR policies to adapt to remote, flexible, and hybrid work obliged by Covid 19 pandemics?

How prominent role did HRM professionals play in this process, mainly which functions? This chapter answers these questions by referring to the critical findings from the large-scale funded project on the flexible work management system in Turkey regarding essential HR functions transformed during the pandemics. The project was completed in January 2021 (Işık, Yenisey, & Kantur, 2021).

FLEXI-TIME-SPACE WORKING SOLUTIONS AND HRM

Covid-19 prompted the organizations to review, redesign, and change their operations. Especially human resource (HR) management has undergone a significant change in this process, not only in terms of operations but also in terms of the ultimate reasons of their existence, purpose, and role. In past years, the HR role has begun to cover much more than recruitment, payroll, performance, training, management of workplace culture, and employee engagement, yet psychological well-being and organizational resilience started to be a topic on the HR agenda. The pandemic brought new challenges to HR's table. HR professionals must guide their companies and employees through the transition to a more digital and scattered work environment, and they also had to learn how to be productive and successful in their roles when working from home. HR professionals now are compelled to develop new competencies to handle more fragile social settings emerging suddenly. Undoubtedly, the remote working experience was at the forefront of these difficulties since the game's rules have changed forever for some organizations. While experiencing flexible working, it has raised questions on whether the organizations will continue to provide flexible working opportunities after the pandemics or leave them behind.

Following the Covid-19 pandemic experiences, the employees' demands for flexible working increased. Even if the social distance and isolation rules are withdrawn, and companies reopen, employees still request flexible hours, and remote work alternatives become the new normal. Flexible work arrangements become increasingly commonplace to attract and retain the workforces to the organizations. Many organizations have searched for the best flexible working arrangements and how successful flexible arrangements can fit their companies or how work hours other than the traditional 09.00-to-17.00 can be implemented without sacrificing productivity. It has also been discussed that even in the absence of a pandemic, flexible work arrangements can aid the organization's attempts to be socially responsible by improving recruiting and retention efforts, augmenting organizational diversity initiatives, and encouraging ethical behavior. Cost reductions, productivity, and increased employee involvement are deemed possible outcomes for employers (SHRM, 2021). For instance, reduced commutes to the workplaces, road traffic, and consumption have been appraised as sustainable and socially responsible outcomes that positively impact the environment (Yu, Burke, & Raad, 2019).

During the pandemic period, performance management emerged as the process to be adapted to changing work conditions, such as following the performance of employees while they work from home, transferring one-to-one performance interviews to online platforms, and using alternative solutions such as using dashboards and digital data to evaluate performance (Narayandas, Hebbar, & Liangliang, 2020). One spotlight is how employees' performance is observed, assessed, and evaluated while working remotely. In times of crisis, evaluating or not evaluating performance is a challenging question (Fraij, 2021). For example, in research conducted with 250 human resource practitioners by Mwita (2020), 83.5% of the respondents said it was difficult to set realistic short-term and long-term goals for employees. As many companies are limiting or even abandoning performance evaluations, for some organizations, it is essential to continue performance measurement during turbulent periods. Since the performance

evaluation-related meetings serve as a communication tool in the organizational change processes, suspending the performance evaluation meetings may imply subsided performance expectations from the employee (Aguinins & Burgi-Tian, 2020). Moreover, performance evaluation allows sustaining the performance data to chase the critical business performance data emerging in such survival-threatening periods (Wilken, 2020). However, performance negotiations must be humane and constructive since the stress triggered by the crisis is already overwhelming (Mwita, 2020).

Furthermore, as remote work has become the norm, the crucial role of employee engagement is amplified to maintain productivity (Aguinins & Burgi-Tian, 2020). An effective performance management system sets a ground for employee engagement, leading to increased job satisfaction and decreased intention to leave (Kuvaas, 2006). In the new normal, for HR professionals, finding solutions to the performance topic and determining its rules will not be enough to make a difference. The pandemic brings new questions on managing employee engagement and motivation while working flexibly. The engaged employees are persistent in working with their current organization (Kamalanabhan et al., 2009). On the other hand, disengaged employees cost organizations because they may quit, reducing organizational profitability and customer loyalty (Sanford, 2003). Moreover, according to Palumbo (2020), even engaged employees may live exhaustion and stress due to job insecurity and difficulties in balancing work and home life.

According to Kumar (2021)'s engagement model, value, voice, variety, virtue, and vision (5Vs) are the crucial elements for organizations to ponder employee engagement. Flexible work igniting employee engagement should create settings where employees feel valued; feedback channels are used without fear of being judged; remote jobs are designed with skill variety. Enriching job characteristics should be incorporated to let the employees feel personal development. Employees' perception that their ethical values are respected in the organizational processes also would maximize engagement. Finally, an organization's vision and goals must be clear for the employees (Kumar, 2021). Flexibility or hybrid work models embodied 5Vs into their tailored HR processes and policies may increase employee engagement level and well-being during flexible working.

Motivation and employee engagement are mutually related (Beardwell & Thompson, 2017). The transition to a new working model can be distressing for both the organizations and the employees. Uncertainty, sudden changes, and new job demands can produce distress and anxiety and reduce engagement levels. Especially in unprecedented and compelling times, one-size-fits-all thinking causes workplace challenges and impacts the outcomes of flexible working practices. The vigorous progress on new ways of working in organizations overall and HRM functions in peculiar requires identifying flexible working management rules, regulations, practices, and systematic management approaches.

FLEXIBLE WORK MANAGEMENT SYSTEM STANDARDS DEVELOPMENT PROJECT IN TURKEY

Flexible working requires a systematic management process like other critical operations. This idea provoked the research entitled "The Flexible Work Management System Standards Development Project: Practices to Support Business Continuity and Employee Psychological Well-Being" (Işık, Yenisey, & Kantur, 2021) during the Covid-19 lockdown by July 2020 to January 2021 in Turkey.

Fifty-three interviews from 27 local and global organizations were conducted in the qualitative phase from July to September 2020. The companies were from the following sectoral groups: Fuel/Gas Production/Energy/Metal (n=12), Bank/Insurance/Finance (n=4), Aviation/Tourism (n=9), Medicine/

Chemical/Cosmetic (n=12), Fashion/Apparel (n=6), and Technology/Telecommunication (n=10). The participants of the in-depth one-to-one online interviews were HRM directors (n=26) and operational directors or general managers (n=27). Their age ranged from 30 to 58 (Mean= 41.87; SD=7.63); 56.6% were female (HR managers' 59.3% and operational managers' 53.8% were women). The majority of participants (50%) had a master's degree; 3.9% had an associate degree, 42.3% had a bachelor's degree, and 3.8% had a doctorate.

The following issues were discussed with operational managers: operational management during the pandemic period, technological infrastructures needed for business continuity, alternative flexible working solutions applied, positions that can fit flexible work, and the extent to employees' characteristics taken into account in transfer to flexible working. In addition, the following questions were for the HR managers: the changes encountered in HRM during pandemics, their management strategies, processes within the scope of HRM during the pandemic period, and ideas about the most suitable flexible working method for their companies.

All participants (N=53) allowed voice recordings transcribed via Scrintal voice-to-text software. The inductive qualitative content analysis was conducted with MAXQDA software. The mean duration was 41.34 minutes (min.=28 minutes, max.=58 minutes).

The interviews were analyzed to portray the approaches and processes needed to manage flexible working during Covid 19. The results highlighted the essential role of HR in this particular crisis; HR functions prioritized to be aligned with flexible working and the potential benefits of a management system perspective to this particular way of working.

The Role of HR in the Challenges of Transition to Flexible Working

In the last two years, research underlined HR's essential role in helping organizations navigate the dramatic changes caused by the pandemic lockdown (Gigauri, 2020). İlhan (2020) mentions that as the COVID-19 crisis has brought mandatory changes, and the businesses abandoned many existing practices and turned their focus to emerging issues, one of the areas of management practices where changes took place - perhaps the most important one due to its central role in the coordination of all processes - has been HRM. Agra (2021) pinpoints that every stage of the process, such as the determination, implementation, and control of practices and strategies, brought new responsibilities to HR professionals. As the lockdown negatively affected the labor market, countries started to fight this crisis by putting social and economic aid and incentive packages into action (Eroğlu, 2020). In addition, the implementation of various measures such as short-time working allowance, support from the states, the use of unpaid leave, the introduction of new regulations on occupational health and safety, and the follow-up of rules such as the prohibition of termination brought by the state has also emerged as the new tasks that the HR departments should dominate and manage during the pandemic (Agra, 2021; Centel, 2020; Dinçay, 2021).

The period was stuffed with unique features, the rapid transformation of work styles, the creation of safe and sound working conditions for those who continue to work in the field, and the implementation of solutions ensuring job security in a period of financial fluctuations, to list a few. Maintaining employee motivation and loyalty under these conditions and executing functions according to national regulations necessitated a robust HRM operation. Informing employees about the COVID-19 pandemic, implementing the regulations regarding it, managing the potential resistance to measures, helping the staff be resilient in this process, providing psychological support, maintaining job satisfaction, and keep-

ing effective communication with employees (Ağra, 2021) became the key responsibilities fell on HR professionals while adapting to this new process.

In the current projects, the participants' discourses portrayed the role of HR in preventing employee health and ensuring continuity of work throughout the pandemics. HR professionals' roles became critical, from determining the flexible working methods that best fit the organization to developing the operational plans. The participants emphasized that those who initiated the "first move", got control over the process, and carried a "critical role" were the HR departments in this crisis. In past crises and previous experiences, those who combat the turbulent conditions were usually the finance departments. However, HRM employees held a pivotal role in the current threat and were expected to "make a difference". One HR manager from the aviation industry expressed his thoughts as follows:

The units that managed finance, cash, and capital came to the fore in the past crises. In the past crises, in 2012, in the 90s, and before, the financiers were generally at the forefront. However, this time, from the very beginning, the critical players in combatting this crisis successfully and making the company more sustainable were HR professionals. So HR people played a critical role.

Similarly, an HR manager from the technology-telecommunication sector mentioned that the process was "very intense" for HR:

The HR unit carried out the fighting process. Then, the operational managers determined how the business would continue in their units. However, the first move was started by us. On March 16, we switched to remote working, and until March 16, we took as many precautions as possible and made these preparations. It was a hectic period for us.

Making arrangements to carry out the measures against pandemics, adapting to national regulations, benefiting from the support packages offered by the states, and following the global guidelines was very demanding for HR departments.

We try to find a way by stretching the opportunities offered by the state and our conditions. It was an exhausting process, frankly speaking, and although the company's organizational structure is dynamic and flexible in making decisions, I can still say that taking and announcing these actions took time. But, we did our best. None of us was prepared for this process. (Aviation Sector, HR Manager)

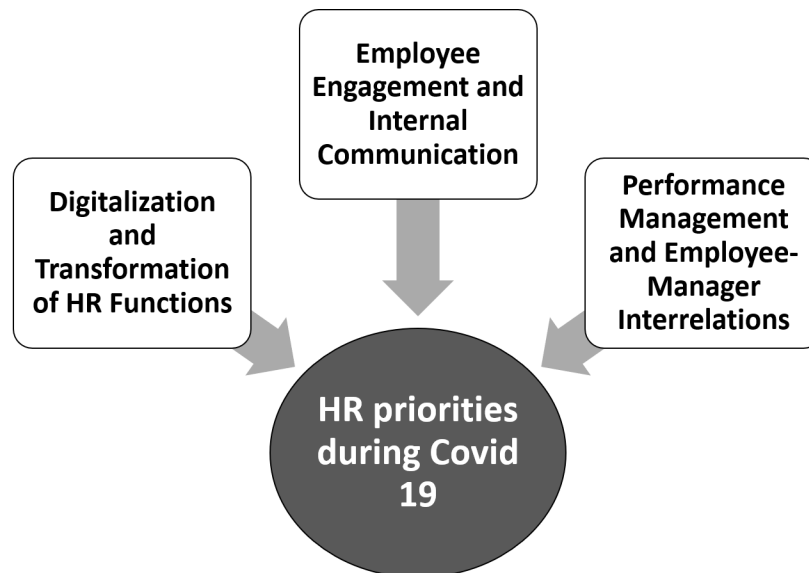
We followed all the broadcasts. We have a retail human resources community with about twenty companies. There was continuous communication flow in that group. What were they doing? Where are we in this? We were in a constant stream of information. We followed the information flow in the sector, legal authorities, and the regulations. We took all the precautions based on the mixture of information received from various sources. (Fashion Industry, HR Manager)

Henceforth, the findings asserted that although the company's economic conditions, strategic priorities, and management perspectives determine how the pandemic is fought, HR had an essential role in making a difference. The policies, standards, and HR practices need to be re-written and redesigned according to the specific context of the organizations. As HR's role is expanded to keep up with fast and abrupt changes, the new normal started shaping the future of HR. In the current study, the in-depth

analysis of the interviews helped to observe how these transformations were experienced in organizations and which HR functions received more attention.

The detailed open coding process of 53 interviews and the constant comparative approach used during the grouping and regrouping of the open codes brought 583 themes and sub-themes. The code system resulting from the analysis consisted of a minimum of 1 to a maximum of 147 segments, i.e., coded expressions. The most frequent master themes (with a minimum of 42 to a maximum of 147 segments) were “digitalization and transformation of HR functions” ($f=147$), “employee engagement and internal communication” ($f=139$), “performance management and employee-manager interrelations” ($f=119$). By postulating these themes as the top priorities of HR during Covid 19, the following sub-sections will scrutinize digitalization, engagement, and performance management and their vital interaction for pursuing effective communication and people management in the process of flexi-time-space working (Figure 1).

Figure 1. The master themes emerged as the HR priorities during Covid 19



Digitalization and Transformation of HR Functions

Organizations began investing in HR technology for data-driven performance management, payroll, and talent management processes in the last decade. Today, HR technology is no longer a luxury; it is a simple way to automate processes to attain efficiency in operations. During the pandemic, HR departments were forced to adapt themselves to the demand of the new normal. It has been seen that the digital adaptability of HR practices and HR professionals to the changing demands thrives for business continuity, and the importance of digital-based and technology-supported practices under the condition of “new normal” has begun to be understood.

Online recruitment interviews, used before the pandemic, are now the most common examples of digital-based HR practices. Participants from organizations that continue to recruit during the pandemic stated that recruitment operations are mainly conducted online, even for C-level employees.

Human Resources Management's Predominant Role in the COVID-19 Crisis

We recently recruited our CFO online and did on-boarding as well. No one physically met in this process, but it worked out. We also hired two directors, and they also did not see anyone in physical settings. Normally, we used to open our advertisements, receive our applications, physically invite them to the office, conduct interviews, and conduct assessment centers. These processes are now done entirely on online platforms. (Technology Industry, HR Manager)

In some organizations, orientation and on-boarding processes have also moved to online platforms to help their new members adapt to the organization and their position. One of the participants gave an example from their company:

We also have a mobile application regarding an on-boarding process which accompanies the person for 90 days. It is shared with the newly hired employees before they start to work. Instead of bombarding the person with information, we send weekly content, provide various levels of information from basic to deepened. (Technology sector, HR Manager)

There is an electronic system that we use when a new employee starts to work, and we follow the orientation and compulsory training through online tools. Our data is kept in the cloud system. Since 90% of all our processes are digital, we did not experience any major problems during the pandemic period. (Metal Industry, HR Manager)

However, recruiting, on-boarding, and even working without meeting anyone in physical settings may also induce concerns. For example, if fully online recruitment and on-boarding processes are used, would we expect the same level of engagement within the team and the intimacy level among colleagues? One of our participants expresses his concerns about this:

I think it is tough for beginners to adapt. Because newcomers need a setting to get quick hints from a friend next to them, I would be nervous about my first start. Also, it would not be easy to talk to people I have never met. (Technology sector, HR Manager).

Here is the communication's crucial role come up. Before the pandemic, HR digitalization discourse had spread to all sectors and business lines with technological capacities, and many companies have already incorporated digital communication tools for regular briefings and information sharing with the employees. During the lockdown, these digital means of communication had a life-saving function.

Corona Portal was established on the intranet. Here, much information from travel risks, health services, and precautionary measures was presented to all our employees by our global suppliers. (Metal Industry, HR Manager)

We immediately shared the information received by our occupational health and safety specialists and occupational physicians on the announcement screens. We inform the employees in the office through these screens. We also inform our employees at home by e-mail. We also use announcement screens on our website. That way, we try to deliver all our announcements to our employees as soon as possible. (Aviation, HR Manager)

Designing employee feedback channels through digital communication tools and applying pulse check surveys to ensure employee participation are also emerging examples. From the technology sector, the HR manager shared that they were doing pulse check surveys every 2-3 weeks at the beginning of the pandemic and continued it every two months during the normalization period and afterward. It draws attention that companies focus on employee engagement and starts to listen to their employees' opinions by pulse check surveys and asking their emotional states and needs:

We conduct pulse check surveys with a couple of questions, like; How do people feel now? Are they connected to their teams? Is the company still staying aware of their needs and priorities? (Technology, HR Manager).

Therefore, the results highlighted the use of simple digital solutions to sustain essential functions of HR like recruitment, on-boarding, and internal corporate, which were considered critical to maintaining employee engagement too.

Employee Engagement and Internal Communication

Employee engagement has been among the critical topics in organizations' HR and management policies for many years and is considered a significant predictor of tenure. In this study, participants referred to employee engagement as immersed with internal communication. Employee feedback mechanisms and monitorization of the employees' emotional and physical states were considered shared components of communication and engagement.

In this context, an HR manager from the technology sector indicated the importance of using their communication channels to let their top managers exchange the updates and receive feedback from the employees:

In the beginning, our CEO was organizing weekly meetings with employees where he shared the current situation in a very transparent way. We created communication channels and platforms to take employees' suggestions. An open environment has been created for our employees to share their ideas freely. (Technology Sector, HR Manager)

Another example is from the energy sector, where the focus is to strengthen the communication among the employees:

We created an area in our internal portal where employees can share personal ideas, and experiences such as lessons learned during the pandemic period (Energy Sector, HR Manager)

There are valuable examples such as cultivating constant communication, sharing simultaneous information, and enhancing social interaction via a communication network. For example, one of the operations managers stated that they created an online platform during the remote working to enhance the socialization and information exchange about various topics such as economics, physical, and psychological health:

Human Resources Management's Predominant Role in the COVID-19 Crisis

We created an online platform, “Happy Hour”, aiming at socializing, getting together, and having a chat outside of work like organizing competitions, celebrating birthdays, and meeting after work hours as if in a physical environment. For example, everyone grasped their drink, chatted together via the online platform. (Technology Sector, HR Manager)

We held Q&A meetings with our employees over Teams. There were coffee chats, informative talks, non-work conversations, which kept the motivation very high. We received serious support from all our friends. This made our employees working in the field as happy as those working at the home office. Our friends working from home also gave supportive messages to colleagues working in the field, one thousand two hundred and fifty-six people... It will sound like a slogan, but I can honestly say that everyone has become like a family. (Pharmaceutical Industry, HR Manager)

In this period, the importance of communication and warm communication has come to the fore again. We organized some motivational training to protect this bond. Head offices have a weekly online small coffee session. Everyone took their drinks and stood in front of Skype. We reserved an hour for an informal talk, meeting, about how is life going. (Fashion industry, HR Manager)

Therefore, organizations have emphasized the importance of communication to maintain motivation during the pandemic period. For example, companies that create a sense of family have increased communication to maintain the bond that employees feel when they come to the office, not to lose the sense of unity that “we are one”.

Performance Management and Employee-Manager Interrelations

Organizations are often stuck in the structural complexity of performance management systems, unaware of how the system impacts the employee experience (Kakkar, 2020). A well-executed performance management perspective provides a practical setting for employees and managers to interact, considering that the primary elements of performance management are agreement, measurement, feedback, positive reinforcement, and dialogue (Armstrong, 2006). While highlighting the pivotal role of interrelationships, many participants emphasized that performance can be followed through regular interactions, giving feedback, and following up through “one-to-one” but with “remote” touches.

We followed the performance by working closely with our teams, both in one-on-one meetings and team meetings. (Fuel Industry, HR Manager)

It is not necessary to work in the same physical environment to observe performance. I think it can be solved by regular communication and follow-up. (Fashion Industry, Operations Manager)

These segments are accordant with Adler (2021) ‘s conclusion on the presence of a strong consensus that good practice includes regular, supportive, helpful, motivating performance talks and greater clarity on employee expectations (Adler, 2021). According to Risley (2020), building habits is critical to establishing and maintaining successful new processes and turning plans into actions. For example, for the feedback processes to turn into a habit, which is the most critical issue in performance management, meetings with the employees should be regularly planned, it should be transparently explained to the

employees how often they will meet with their managers. However, when employees and managers do not work in the same physical environment, especially if the performance indicators set for the employees are not transparent or not specified at all, external control mechanisms come into play; consequently, “policing” creates more stress and demands among employees (Aguinis & Burgi-Tian, 2021). Managers’ approach to monitoring their employees with the suspicion of if “they truly work” is perceived as a mindset to be dumped.

How are we going to get out of this mindset? We need to provide the data; I think that when we show ‘we have switched to this system, these were the targets, these are the results’, those minds will be a little more relaxed. (Fashion Industry, HR Manager)

The importance of determining the key performance indicators clearly and understandably in the performance system of remote working emerges as the consensus of the participants. The performance objectives should be achievable and communicated thoroughly, considering the challenging external environment and barriers employees face when working from home (Aguinis & Burgi-Tian, 2021). The performance system most suitable for remote working emerges as the systems based on work outputs (Aguinis & Burgi-Tian, 2020).

The most critical issue is whether they can deliver these work outputs rather than where and how many hours they work. If they do their jobs, it does not matter where or how many hours they work. (Technology Sector, HR Manager)

As performance systems based on outputs were emphasized when working remotely, some participants gave examples of call centers while describing the ideal tools and systems that can be used in performance evaluation in the teleworking system. For example, in the working system of the call centers, everything can be monitored from morning to evening, lunch break times are defined on the system, in case of delay, the system gives an error, conversations, and phone calls are recorded. While one of our participants highlighted the lack of a monitoring system which led to extra-effort for the follow-ups, another participant, who is managing the call center operation of their banking company, states that they feel “lucky” compared to other teams because they have a data-driven system to monitor the staff’s performance.

Since we are a call center, everything can be tracked by numbers. Compared to other teams, we are fortunate to watch from afar. I think we were the only team that does not have any questions about tracking the performance while working from home during the pandemic process. (Banking sector, Operations Manager)

Like call centers represent a close-monitoring approach, some managers also show eagerness on a system that can track work in detail. However, in some jobs and sectors, the lack of clearly defined performance indicators does not allow performance monitoring, the possibility of disagreements between the manager and the employee increases, especially during the performance interviews held once a year.

I think there should be performance criteria including measurable metrics and that is much more defined, and systems should be created where people can track their objectives themselves. (Technology Sector, Operations Manager)

Human Resources Management's Predominant Role in the COVID-19 Crisis

Since we started home-office working, there have been changes in performance management, and we completely redesigned the processes and KPI tracking systems. (Banking sector, HR Manager)

Some companies reported that they deliberately postponed the performance appraisal process and removed its focus on performance to employee well-being.

Our essential need was to protectin and survival. Performance was not on our agenda. We were not in a position to conduct performance interviews with the store employees at a time when the stores were closed. (Fashion Industry, HR Manager)

We did not turn the performance into a problem during this period. We are rather interested in whether our employees feel well as working from their homes, and if they have necessary work equipment than their performance. (Technology Sector, HR Manager)

An HR manager from the banking sector states that it is not fair to evaluate performance in this period when the way of doing business has changed:

It is unfair to evaluate the performance or question if the objectives are met. We considered the targets realized during the performance evaluation and but gave the same bonuses as previous years. Even though the performance has decreased, we have ensured that they do not suffer. It would be unfair, so we supported them. (Banking sector, HR Manager)

The results from this sub-title inspire performance management to strengthen the transparent relationship between the managers and employees, instead of tracking the number of outputs or the duration of being online in the corporate remote system, which can embody a practice resembling a detective's quest.

THE INTERCONNECTEDNESS AMONG THE HR ROLES, ADAPTATION, AND DIGITALIZATION DURING COVID-19 PANDEMICS

As a result of the pandemic, organizations and HR have been forced to think, behave differently, and tailor their business processes accordingly. However, it is a matter of curiosity for researchers, which experiences learned during the pandemic will be permanent. The impact of flexible working on future life and technological developments' contribution in this process is at the core of the curiosity.

Morales and Misner (2021) expressed that before the pandemic in many organizations' perception of flexible work, five myths were dominant, which are the loss of control, culture, collaboration, contribution, and connection, the assumption that "flexibility might be great in theory, but it just does not work for us" was overwhelming. The obligatory "experiment" of remote working induced by the pandemics gave the chance to challenge these myths.

Although some organizations decided to change to flexible working permanently, some preferred to apply hybrid working, and many have not decided yet. However, the organizations that decided to work flexibly have started redesigning and renovating their physical offices. For example, according to Bloomberg (2021), the Swedish telecommunications company is cutting desk space from 60% to 20% to make place for social and co-working facilities for their employees who are not necessarily required to

be present at offices and can work from home or a “third workplace,” such as a café. Ericsson is one of the companies renovating its 400 offices worldwide in preparation for the future when half of its 102,000 workers will work remotely (Lindeberg, 2021). According to Ericsson, only flexible organizations will recruit the top employees. Therefore, if flexible working will be a permanent system, HR practices and employee behaviors must change. As the tendency of employees to prefer organizations where flexible working is applied, employer value propositions, talent, and career management strategies should also change.

In line with this progress, the findings from the talent shortage survey of Manpower Group (2021) claimed that nearly 69% of companies had reported talent shortages and difficulty hiring in contrast to previous years, and the estimation of the rise of difficulty is 15%. It is striking that companies with the least flexibility and workplace-based positions are having the most difficulty filling jobs right now. For this reason, 36% of employers make flexible arrangements regarding start and finish times, and 31% plan to offer a mix of remote and workplace-based working. Now, employers shift their minds and try to constitute flexibility into those previously perceived as inflexible roles. Therefore, HR leaders and managers should constantly shape their processes and shape their organization to fit in the future workspace (Schultz, 2020).

Interviews of the current research depicted that while the HR role has been more critical during the pandemic, their daily tasks have been changed dramatically. It is expected that the faster the HR professionals can keep up with this change, design their processes accordingly, and guide the leaders and employees of the organization in this regard, the learning and change rate of that organization will increase. According to Burr from SHRM (2020), HR professionals should find strategies that work for everyone. HR professionals can act as strategic consultants inside the organization. First, they should train themselves to foster virtual communication performance management in the organizations. Second, prevent conflict management due to remote working, and finally incorporate flexibility and use it for recruiting and retaining talent from all over the world. However, this also depends on the competency of the HR professionals. Digital literacy, adaptability, and agility have been critical for HR professionals to keep the pace of the new era. Acquiring these skills and applying them to the roles can be considered performance indicators among HR professionals. In addition to HR roles and competencies, the expected competencies from candidates, who will work remotely and flexibly, will be changed as well. Therefore, the HR departments should assess the candidates' competencies whether they are suitable for flexible work. However, the employees who will work flexibly should also be suitable for flexible working competencies, yet the assessment and development of these competencies for current employees will also be an issue.

As the results proposed, shifting working style necessitates digital advancement in HR practices. As experienced during the pandemic, organizations with available digitalized solutions and infrastructures dealt better with the problems induced by working from home. However, while new jobs, new ways of working, and digitalizing are increasing; therefore, organizations should emphasize involving their employees' ideas and suggestions in shaping and designing the activities and workplace (De Paoli & Rapo, 2017).

Furthermore, flexible working requires a new understanding of the maintenance of engagement and motivation of the employees. The potential challenges of remote working are management's resistance to change and their intention to increase control, especially in work supervision, virtual teamwork, and highly variant schedules. However, keeping motivational programs regarding employees' needs, focusing on unique needs of segmented working groups, training leaders, enhancing effective communication can

prevent these challenges. Furthermore, different groups can prefer different working models and react differently to changes (Yıldırım & Korkmaz, 2017). Therefore, every organization could have different activities, policies, and management strategies.

However, it has been seen that there are common issues that every organization should deem. Even though working from home and teleworking were included in the labor law long before the pandemic, most businesses experienced remote working during this period to ensure business continuity and comply with the restrictions and rules. Furthermore, this situation brought up the issues to be considered in the remote working process, which is the employer's responsibility by law and how these can be fulfilled in remote work without modern and updated laws. For instance, by the labor law, the employer is obliged to inform the employee about occupational health and safety measures, to provide the necessary training and health surveillance, and to take the necessary occupational safety measures regarding the equipment provided, taking into account the nature of the work performed by the employee to whom he/she employs with a remote working relationship (Labour Code Art. 14/6). Nevertheless, flexi-space working models make it much more challenging to take and control occupational health and safety measures. However, in legal terms, the flexible work of employees in time and/or place will not remove the employer's obligation to observe, and the employer is still obliged to take occupational health and safety measures, to provide the necessary protective materials and necessary training, and to supervise whether the measures are taken by making risk assessments. Inspecting the occupational health and safety measures becomes more complicated when performed from the employee's home. The inviolability of the employee's residence and the confidentiality of their private life are obstacles to inspecting the employee's home without their consent and prior notice (Işık, Yenisey, & Kantur, 2021).

Our company's priority is occupational health and safety. In this sense, of course, we had to quickly determine the remote working practices; The safety of the working environment in the home of our friends who will work from home... Did they meet the requirements? We tried to create a mini risk analysis with our occupational safety specialist by asking them about their workplace posture, noise in the working environment, or possible dangers. When I look at the occupational health and safety aspect, I think that it is necessary for our colleagues who will work remotely to be sure that they provide a safe environment for themselves or that the company should contribute. While working flexibly, we can have friends who work from vehicles or in dangerous conditions. Maybe a regulation on this would be good. (Metal industry, HR Manager)

Designing the model in line with the law, with employee needs and experiences, constructing the employer brand, protecting employee privacy are the crucial steps to be taken by HR professionals. Moreover, the transition process to a new working model can be complex for both the company and the individual. Uncertainty, abrupt changes, and new job responsibilities can cause stress, anxiety, and a drop in participation. During this transition, HR experts play a crucial role in guiding their company and the managerial attitude. If no preparation and mitigation plan is in place before implementing flexible working, it might harm employee engagement.

FUTURE RESEARCH DIRECTIONS AND CONCLUSION

The critical challenge for future business is advancing labor market opportunities to meet, complement and shape technological innovations. This drive will require innovation in organizations involved in the labor market, modernizing the laws, policies, norms, structures, and businesses that set the “rules of the game” (MIT, 2020). According to the PwC’s report (2017), “the factors that will shape the future of work are technological and demographic changes, rapid urbanization, changes in the global balance of power, resource depletion, and climate change”. As a result of the technological changes mentioned in the report, it is expected to increase individuals in the working life due to the change in jobs, world population, and the prolongation of human lifespan. In addition, digitalization leads to an increase in the number of jobs done remotely (Autor, 2014), and the necessities of learning new skills will come to the fore. On the contrary, businesses and sectors will significantly change due to the depletion of world resources and climate change. Therefore, future research should focus more on flexible working and macro events and find solutions positively impacting sustainable resources.

This study revealed that there had been an increase in working without borders after the pandemic. In line with the “work from anywhere” style emerging in recent years, which is called digital nomadism in the literature, it eliminates the physical link between home and workplace. While working from home has productivity-enhancing benefits such as not wasting time in traffic, fewer breaks, or taking sick leave, geographic flexibility brings additional unique benefits like moving to places with a lower cost of living and exhibiting higher increases in productivity (Choudhury, Foroughi, & Larson, 2020). However, the opportunity to work from anywhere and eliminate international borders means that companies are moving their current competition to an international platform. In other words, this situation points out that companies should consider the possibility of losing talent in the local market and international markets.

Regarding precisely this issue, the participants in this research addressed that the flexible working option is a factor that shapes the perception and identity of the employer in the labor market. This phenomenon, defined under the concept of employer brand in the literature, is related to the effort of being an employer preferred by the candidates in the labor market. Therefore, future research should focus on organizations that can strengthen their employer brands by using flexible working models.

While employees typically cite flexibility as one of the most desirable features of a job, many appear reluctant to take advantage of the options available, fearing that their careers will be irreversibly damaged. Among the reasons behind this reluctance may be the possible differences in wages and benefits of flexible workers and non-flexible workers (Weeden, 2005). Therefore, the HR field should consider providing fringe benefits such as meals and transportation and avoid creating an imbalance between employees working remotely or in offices. Another critical point is to guarantee flexible workers’ promotion and personal development opportunities equal to other employees. The flexible glass-ceiling effect emerges as a remarkable expression used by Weeden (2005) in the study of paying attention to the obstacles that may affect the achievement of flexible employees’ career goals. If the flexible glass-ceiling effect indicates discrimination, it is necessary to consider where the direction of discrimination stems from and how inclusion and diversity efforts will be affected. In addition, it should also be examined in future studies that if it happens, how flexible working systems will be affected.

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KEY TERMS AND DEFINITIONS

Employee Engagement: It is the involvement and enthusiasm of employees in their work and work-place (Gallup, Inc., 2022)

Flexi-Space Working: It consists of the terms “work-at-home, remote work, working from a location other than the central office, working from another city, and working from another country”.

Hybrid Working: It combines “flexi-space” and “flexi-time working” according to the organization’s structure and the needs of the employees.

Performance Management: It is a systematic process for improving organizational performance by measuring, managing, and developing the performance of individuals and teams (Tweedie, Wild, Rhodes & Martinov-Bennie, 2018; Armstrong, 2006).

Chapter 8

Work/Family Interventions and COVID–19 Pandemic Remote Work Arrangements

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ABSTRACT

This chapter discusses work/family interconnections, theory, and the interventions that organizations have put into place to help employees manage their work/non-work boundary, such as flexible work options. The advent of the COVID-19 pandemic has led to the utilization of a specific type of flexible work option, working from home, or remote working. This chapter discusses the benefits of remote working for employees and organizations, the challenges of remote working, and the ways to make remote working be successful in organizations. Finally, the chapter looks at remote working globally and what the future of remote working may look like.

INTRODUCTION

Research studying the interconnections between the domains of work and family emerged in the 1960s and 1970s, influenced by changes in family structures and workforce demographics such as the influx of women into the workforce, dual-earner families, and single parents (Bellavia & Frone, 2005; Bianchi & Milkie, 2010).

Questions related to the impact of women's employment on children and marriage directed the first studies in this field and suggested that the traditional breadwinner-homemaker model may no longer exist, having functioned under the assumption that workers would have someone they could rely on to cover household responsibilities (Friedman, 2015; Hochschild & Machung, 2012). However, social roles based on gender influence social expectations and attributes about both men and women, and gender-

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appropriate behaviors are first learned and then reinforced through society's structures (Eagly, 2013). Dinella et al. (2014) stated gender segregation in work and educational choices is still very evident, creating a gender divide in the labor market. Bianchi et al. (2006) reported that married women with children continue to perform a disproportionate amount of childcare and housework compared to their husbands with women spending almost twice as many hours on non-work roles related to childcare and housework. Collins et al (2020) reported that children are more likely to seek out and interrupt their mothers for assistance, fragmenting the time mothers spend on non-family issues. While more families are dual-earner households, women experience more anxiety in their daily tasks, are expected to complete most of the family responsibilities and tend to multitask to fulfill all of their roles (Craig & Brown, 2017). The pervasiveness of defining gender roles of males and females continues to interfere with an individual's personal and professional interests (Ridgeway, 2011) and guides their work and family role behaviors (Duxbury & Higgins, 1991).

The COVID-19 crisis disrupted when, where, and how employees work. Due to the quarantine nature of the pandemic, workers and employers were confined to their homes when non-essential businesses were shut down. The economy had to advance, so organizations were forced to contemplate new ways of working. Prior to the economic shutdown, only one quarter of the workforce used a modified version of employment such as flextime or telecommuting (U.S. Bureau of Labor Statistics, 2017), and their accommodations were implemented after a period of planning and training to ensure productivity and a balance between work and non-work. Thus, Bloom et al. (2015) found higher job performance, work satisfaction, and worker retention as benefits of remote work. However, in 2020, millions of employees began working from home with little to no preparation or support. Early estimates now indicated over half of employees work from home (at least partially).

In this chapter, we explore the theoretical underpinnings of work-family issues and discuss the organizational responses to them and benefits of these policies in the workplace. Then we explore the barriers to the utilization of family-friendly policies in the workplace. We then examine workplace flexibility, one of the most useful of the family-friendly policies, since remote working is a form of workplace flexibility. We then discuss remote working under the pandemic, its benefits and its challenges. Finally, we discuss the ways organizations can meet these challenges to make remote working work, and end by exploring where it has worked well, and the future for remote working.

Work and Family Theoretical Frameworks

Associated with these changes in family structures and workforce demographics was the examination of how demands and resources from one domain directly affected role performance and quality in the other domain, resulting in research that focused on either work's influence on family (MacDermid & Williams, 1997; Menaghan & Parcel, 1995) or family's influence on work (Friedman & Greenhaus, 2000; Frone, et al., 1997). Greenhaus and Beutell (1985) suggested that participation in one role creates conflict in another role, thus creating conflict between the roles in three different ways. The conflict could surface when time constraints occur between the roles (time-based), participation in one role makes it difficult to fulfill another role (strain-based), or the specific behaviors essential for one role are incompatible with another (behavior-based). When experiencing a crisis, women are more likely to reduce their working hours or temporarily leave work to address the crisis than men (Andrew et al, 2020). The demands from one role can deplete energies and resources from another role. Anderson, et al (2002) reported that employees who perceive negative career consequences associated with managing family responsibilities,

especially those without family-specific workplace support experience a higher level of conflict, and those pressures increase turnover and job satisfaction.

Earlier research from Marks (1977) defined conflict in his scarcity model. He stated that individuals have finite psychological and physiological resources to allocate between the work and non-work domains, and the more roles one had, the less one could optimally perform the functions for each role. Thus, competing demands from both domains made it difficult to meet the demands and acquire the rewards associated with these demands. He predicted that the more time an employed individual spends in a non-work domain and the greater their personal involvement within that domain, the less committed they can be to the employing organization (Marks, 1977).

The conflict created with the new role accumulation resulted in role pressures that were mutually incompatible. The amount of conflict would rise in proportion to the amount of time spent in both domains (Greenhaus & Parasuraman, 1999; Haas, 1999; Voydonaff, 2004a). While it is often necessary for people to juggle multiple roles, it is common for them to be stretched thinly among the various responsibilities in life. Voydanoff (2005) documented that demands and resources associated with participation in the work or family domain directly affect role quality and performance in the other. The extent to which they influence depends on the extent to which they can drain or generate resources. Two types of demands and resources exist: within-domain and boundary-spanning. Within-domain includes characteristics from one domain that influence performance in another domain. Time-based community demands hinder performance through a process of resource drain. Therefore, time spent in community activities and giving informal help may have negative effects on other domains. Boundary-spanning domains and resources are inherently part of two domains. While boundary-spanning may originate in one domain, they serve as demands and resources in both domains (Voydanoff, 2005). Community-based services provide support to working families, enabling them to maintain their work schedules while meeting their family responsibilities. They can include child care, after-school programs, and transportation services. Resources are structural or psychological assets that are used to facilitate performance, reduce demands, and possibly generate additional resources (Voydanoff, 2004b).

Employees who experience role conflict have less control of work-life demands and perceive they have fewer resources to manage work-life conflict. The draining of resources from each role creates emotional exhaustion and is likely to impede not only that role but interfere with responsibilities (Greenhaus & Beutell, 1985), increasing the amount of conflict between roles (Dickson, 2008). Also, Friedman (1990) and Frone et al. (1992) studied occupational roles and discovered that conflict spillover between work and family could be different for high versus low job levels.

To combat the conflict, individuals will strive to protect and maintain the resources they have acquired. Conservation of resources theory suggested that the feelings of being overextended and the depletion of emotional and physical resources (Maslach & Leiter, 2008), were likely to occur when resources were lost, and an increased sensitivity to resource loss would lead to an individual overcompensating in that role, expended a large number of resources to prevent further loss. Environmental conditions at home and work can deplete or threaten resources, and individuals tend to protect and maintain the resources they value most. Hochschild and Machung's findings (2012), based on social role theory, suggested women value, protect, and maintain relationships because they experience an increased sensitivity to discrimination based on family responsibilities, confirming an increase in their need to protect the resources they value most.

Family-Friendly Policies in Organizations

These issues resulted in organizations being more involved in their employees' personal lives and attempting to meet the needs of employees by creating policies that address issues between the workplace and home. Hammer et al. (2009) and Kossek and Lee (2017) found that supervisors play an important role in creating family-supportive environments by helping employees manage work-family demands. With the spillover from one domain to another, employers began to recognize the need to implement strategic initiatives that would assist employees to integrate their work and family situations. The purpose of these programs and benefits was to decrease the work and family conflicts among employed parents while at the same time, decreasing absenteeism and healthcare costs (Van Steenburgen & Ellemers, 2009) and improving engagement and productivity (Fung, et al., 2014; Kossek & Lee, 2021; Wood, et al., 2020).

Workplace supports may assist employees in successfully integrating the roles they occupy, and the availability of supports has been positively related to organizational outcomes such as job satisfaction. Neal, et al (1993) examined workplace supports and identified three general types: policies, benefits, and services. Policies provide guidelines for dealing with work and family demands. Benefits are forms of compensation, such as insurance or bonuses. Services are specific programs that are provided directly by or through the employer that address an employee's specific need such as child care. In addition, perceived supportive work-family culture is a component of perceived organizational support, which has been related to organizational commitment (Eisenberger, et al, 1990) and job satisfaction (Shore & Tetrick, 1991).

Several studies have reported that providing child care services can have a positive effect on job satisfaction and productivity and helps reduce absenteeism and turnover (Dawson, Miket, Lorenz, & King, 1984; Ransom, et al, 1989; Sher & Fried, 1994; Youngblood & Chambers-Cook, 1984). While caring for a family member, these employees may face emotional issues as the failing health of the elderly parent, financial and legal concerns, day-to-day assistance and care (in-home or assisted living facility), and spending time on the phone or in-person (Barling, et al, 1994; Gerber, 2005). The response and recognition of these, or lack thereof, could affect an employee's job performance or satisfaction. Based on the research to date, the most apparent impact of eldercare responsibilities on organizations is absenteeism (Barling, et al., 1994; Scharlach, et al 1991).

The use of family-friendly programs has also been linked to a reduction in employee stress (Hand & Zawacki, 1994). Further research that specifically examines the utilization of family-friendly programs and the effect that utilization has on an individual's stress level will provide crucial information on the relationship between an employee's attempt to balance work and family responsibilities and the stress associated with this balancing act.

Lambert (1991) found that when workers believed the available work-family benefits were useful, they viewed their organization as being supportive. Grover and Crooker (1995) found that employees with access to more family-friendly practices showed a greater commitment to their organization and a lower intention of leaving. Their study supported the concept that an organization can illustrate concern for employees by implementing family-friendly programs and thus creating a more satisfied employee.

Greenhaus and Parasuraman's (1994) unique perspective focused more on resource gains and suggested that support, such as a family-supportive supervisor, could serve as a buffer against negative consequences. They recommended that future research examine the conditions under which generation or accumulation promotes enrichment. Similarly, Powell and Greenhaus's (2006) model on enrichment analyzed the theories that bridge the gap between enrichment and conflict. They suggested that researchers

must first start by examining why enrichment has not occurred. In their enrichment model, two things must occur: a resource must be generated in Role A and then applied successfully to Role B. When one of the 2 conditions does not occur (the resource is not generated in Role A or it is generated in Role A, but not applied to Role B), conflict does not necessarily occur. This would be more of an example of lack of enrichment, not conflict. However, when a resource generated in Role A is applied unsuccessfully to Role B, conflict is likely to occur. In this example, conflict would be the opposite of enrichment.

Powell and Greenhaus (2006) suggested this debate between enrichment and conflict could also be linked to the examination of segmentation versus integration (Ashforth, et al., 2000; Edwards & Rothbard, 2000; Olson-Buchanan & Boswell, 2006). While segmentation refers to keeping each domain separate, integration refers to the merging or blending of the domains. These are conceptualized as opposite ends of a continuum (Ashforth, et al., 2000). For those who engage in role segmentation, the separation of the domains may diminish the existence of both enrichment and conflict. However, those who integrate their domains may be more likely to experience both enrichment and conflict.

Benefits of Family-Friendly Policies

The use of family-friendly programs has also been linked to a reduction in employee stress (Hand & Zawacki, 1994). Further research that specifically examines the utilization of family-friendly programs and the effect that utilization has on an individual's stress level will provide crucial information on the relationship between an employee's attempt to balance work and family responsibilities and the stress associated with this balancing act.

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Barriers to Utilization of Family-Friendly Policies

Unfortunately, there was evidence that many employees were not taking advantage of these policies because the culture within the organization was not advancing the development and effectiveness of work-life programs, or accommodations. Instead, managers and supervisors often subverted the policies by refusing to allow their employees to participate or by imposing penalties on the careers of those who utilized the programs, even those that are company-sanctioned or legally mandated (den Dulk et al., 2011). Den Dulk and colleagues studied financial managers in the Netherlands, the UK, and Slovenia and how they utilized work-life policies in their organizations. Concerns emerged about what managers would do to replace employees who needed leave or time off when they did not have the resources to replace these employees, thus resulting in disruption to the managers' work in their department. This would be particularly important if the managers depended on the particular worker. Therefore, a combination of lack of resources to replace a worker who was depended on by a manager would result in a negative allowance decision—despite the great need of the worker for a work-life accommodation. The authors found that this consideration overrode the fact that the organization had a policy in place to accommodate workers and the fact that the managers felt a moral obligation to help the workers. Green et al. (2020) also found in their study of New Zealand managers that managerial reluctance led to low usage of flexible work options.

Workplace Flexibility

One of the most helpful workplace accommodations was workplace flexibility, especially the ability of employees to work remotely (Beigi, et al., 2020; Sweet, et al. 2015). Workplace flexibility started out as telecommuting policies in the 1970's, when rising gas prices made commuting costs prohibitive, and workers starting working at home or in coffee shops (Choudrury, 2020). Working from home has been shown to improve productivity as much as 22% among call center employees in a travel agency (Bloom, 2014). Although Beigi and colleagues (2020) noted that a quantitative relationship had not yet been found between flexible work arrangements and the reduction of work-family conflict, their review of qualitative studies among academics (whose careers offer a large amount of flexibility) did find a theoretical relationship. They found five themes which could moderate the relationship between workplace flexibility and work-family conflict: preference for boundary management, ability for time management, stage of career and family, kind of academic job, and the culture of the workplace. These findings suggest that there are some variables over which the individual worker has some control. For example, time management skills can be learned and the individual can find training and/or the institution can provide training. Included in time management was also responses to the time demands of their job, which can also be learned to some extent—but also has a psychological component of conscientiousness (Audet, et al., 2021) and beliefs about the ideal worker norm (Drago, 2007). Another facet was comfort with multi-tasking. Moreover, Beigi et al. (2020) stated their belief that workers with too many options for utilizing their time may not be effective at using that time, depending on their time management skills such as planning and prioritizing. This would theoretically lead to more time-based work-family conflict (Greenhaus & Beutell, 1985), where the worker cannot decide whether or when to spend their time on work or family tasks.

When you have your family is also somewhat under individual control, at least for men. However, for women, it is less a matter of individual choice, as in the academic career path, tenure and childbearing

come about the same time (Ward & Wolf-Wendel, 2004; Acker et al., 2016; Armenti, 2004; Mason & Goulden, 2004). In other careers, however, women have a little more leeway planning when to have children in their career. Nevertheless, career highways tend to have more off-ramps than they do on-ramps, causing women to lose status and thus promotions, and ultimately pay (Hewlett, 2007).

Boundary management preferences, which we discussed earlier in this chapter, included the preference for integrating work and family/life (permeable boundaries), or to separate work and family/life (fixed boundaries). Beigi et al. (2020) theorized that flexibility would help integrators to reduce their work/life conflict, while it would not help separators to the same degree. de Klerk (2021) likewise found that while workplace flexibility may be beneficial, the boundary blurring that occurs can actually make managing the work-non work interface more difficult. While it is under the worker's control to some extent as to their preference, this preference is most likely somewhat tied to psychological tendencies that are more difficult to change.

Themes that are less under the control of the individual worker are the nature of the academic job and the culture of the workplace. Beigi et al. (2020) explained that the nature of the academic job makes it very easy for the academic worker to work all the time. Technology is a double-edged sword that allows workers to do their work anywhere, anytime. There is always another paper to write and/or revise, more papers to grade, another committee meeting to attend. As more and more workers start working from home, they will start experiencing the same pressure to work all the time that academic workers experience now. Flexible work options are not needed for workers who already have autonomy and flexibility due to the nature of their job.

The culture of the workplace, as Beigi et al. (2020) noted needs to be friendly to the non-work lives of their employees, especially families. Support from supervisors, co-workers, structural support, and institutional supports, all go to create a family-friendly culture. However, as we noted previously, support from managers when a worker needs leave can be difficult to get. Co-workers can be unsupportive when a parent is seen as given special treatment, such as maternity leave or unpaid leave for a child or eldercare reasons (McMullan, et al., 2018). Institutions can be slow to create policies to help working parents, and even if policies are on the books, that does not mean that supervisors will allow those policies, as we learned from the den Dulk et al. (2011) European study, due to reasons of disruption and dependency. Green et al. (2020) noted other barriers to flexible work options such as the lack of preparation by the organization, limited technology to implement remote work, the reluctance of managers to allow flexibility, and the potential for social isolation of remote workers. Eversole & Crowder (2021) discussed the necessary cultural changes needed to effect changes to make academia more family-friendly.

REMOTE WORKING AND THE PANDEMIC

Enter the global COVID-19 pandemic, and employers have now been forced to allow their employees to work from home (WFH) (Agba et al., 2020), or what Choudhury from Harvard has called work from anywhere (WFA) (2020). The pandemic has shown that workplace flexibility is good for employees and employers alike, with employees experiencing improved engagement and experience (de Klerk, et al., 2021).

Working from home had been introduced in 2020 globally as a strategy to make the work environment safe for workers and to limit the transmission of the COVID-19 virus among workers (Agba et al., 2020). Although the private sector had more work from home (WFH) arrangements available to work-

ers than the public sector, even organizations that did not have telecommuting tools available for their workers needed to send them home. Agba and colleagues (2020) concluded in their review of literature on remote working during the pandemic that teleworking is here to stay, has obvious benefits, and is the new normal. Organizations will need to invest in technology such as teleworking apps and other tools and make sure that they have both programs and policies in place.

Working from home does not even mean working from home anymore; for knowledge workers, it can mean working from anywhere (Choudhury, 2020). Once solely the province of digital nomads, or workers independent of location, who combined work, leisure, and travel, many more professionals can work anywhere, thanks to information technology (Hermann & Paris, 2020; Blatt & Gallagher, 2013). Choudhury (2020) found that the WFA movement, brought on by the pandemic, has benefits for organizations as well as workers, including savings on office costs, the ability to hire and retain talent from around the world, and increased productivity. Workers can work wherever they want to, do not have to have long commutes to work, and can achieve a long sought-after work-life balance (Choudhury, 2020).

Benefits to Workers

Working from home, or remote working, has been shown to improve job satisfaction, job performance, reduce turnover and improve retention, and reduce work-family conflict and increase the ability of workers to manage their work/non-work boundary when compared to working in the office (Green et al., 2020). Most employees who work remotely are happy with the arrangement (Muralidhar, et al., 2020).

Job Satisfaction

Putra et al. (2020) in their study of Indonesian bankers found that remote working increased job satisfaction. Hashim et al. (2020) similarly found in their Malaysian study of university staff that 87% were satisfied with their remote working arrangement.

Work Conditions

Workers report having more focused time (Bao, et al., 2020) and fewer interruptions, increased motivation due to higher autonomy and more control over tasks, and the natural comfort of being at home (Ford, et al., 2021; Hashim et al., 2020). Workers also save on commuting costs and time (Bao, et al., 2020).

Work-Life Benefits of Remote Working versus Working in the Office

Remote working can help workers manage their work/non-work boundary (Putra, et al., 2020; Bao, et al., 2020; Kaushik & Guleria, 2020). The benefit to workers of working anywhere can be particularly helpful for dual-career earners and military couples, who often struggle to find careers in the same city (Choudhury, 2020). Workers with families can also stay closer to grandparents and live in lower cost of living locations (Choudhury, 2020) as well as experiencing healthier and closer families (Adisa, et al., 2020; Hashim, et al., 2020). It does, however, require a lot of discipline to keep work and life separate (Hermann & Paris, 2020).

Paradoxically, not all workers experience work-family benefits from remote working. Ford et al. (2021) refer to this as a “Tale of Two Cities.” In their study of software developers, they found that while some

workers enjoyed working remotely, being close to family and having extra time due to no commuting, others found that close proximity to family members was disruptive. We will discuss this further in the Challenges of Remote Working section.

Benefits to Organizations

Improved Productivity

In their survey of 12,000 workers in the US, Germany and India, the Boston Consulting Group found that about 75% of them said their productivity had either stayed the same or increased after they moved to remote working (Dahik, et al., 2020). Productivity gains were highest for individual tasks. Another BCG study found productivity gains of 15-40%. The productivity of Microsoft software engineers globally remained stable and even increased slightly despite the shift to remote working (Ford, et al., 2021). Other studies have found increased productivity with remote working (Sandoval-Reyes et al., 2021).

Increased Engagement

Benefits to organizations go beyond increased productivity to increased employee engagement (Choudhury, 2020; de Klerk, 2021; Sandoval-Reyes et al., 2021). Happier workers are more productive workers. In their qualitative study of twenty-five remote workers, de Klerk and colleagues (2021) found that workers had increased employee engagement (Wood, et al., 2020) and improved employee experience (Plaskoff, 2017), thereby leading them to expect that their arrangements would continue in the future, for at least two to three days a week. Putra et al. (2020) in their study of Indonesian bankers found that remote working increased job satisfaction.

Other Organizational Outcomes

The Boston Consulting Group estimates reduced turnover of 10-15% and absenteeism has been reduced by up to 40% (Kaufman, et al., 2020). Moreover, by reducing the amount of office space needed for on-site workers, companies can save about 20% on their real estate costs by utilizing remote workers (Kaufman, et al., 2020).

Challenges of Remote Working

Nevertheless, there are still concerns about remote working, including how it affects problem-solving and other types of communication which generally happens around the office; how knowledge is shared; how relationships among co-workers are formed and enacted, e.g. mentoring; how performance is managed and rewarded; and concerns about data management (Choudhury, 2020). de Klerk (2021) also found that remote workers' actual experiences with remote working did not always meet their expectations of what the experience actually turned out to be. This was influenced by whether or not they had the appropriate space to work in and the number of interruptions that occurred (Ford, et al., 2021). Parents in particular experienced difficulties when children were kept home from school and they had to teach them while trying to work at home as well. Unsupportive work cultures also affected the experiences of working at home. As we mentioned earlier in this chapter about workplace flexibility, the same difficulties that

employees face when trying to get a work-life accommodation, work from home employees are now facing during the pandemic. Even though they are working from home because of the pandemic, an un-supportive workplace culture can still affect their work satisfaction. Without trust from their employer, workers would work long hours causing stress and anxiety. There was pressure to be available all the time and respond immediately, something to which academic workers had always been subjected, as discussed earlier in our chapter.

Managerial Reluctance

As with other family-friendly policies and flexible work options in general, the greatest challenge to remote working even in the pandemic is the reluctance of managers (Green et al., et al., 2020; Li et al., 2020). However, with the pandemic, managers did not have a choice in the matter and had to learn a new way of working with their subordinates.

Performance Management

Performance management is a little trickier when dealing with virtual workers (Choudrury, 2020). Remote workers need to be evaluated on their outcomes, feedback from co-workers and customers, and their virtual presence. Issues to be worked out are pay consistency across geography and currency issues. The existence of clear job criteria and independent work that does not rely on others leads to more specific goals and better performance management for remote workers (van Zoonen, et al., 2021).

Trust

Trust between co-workers and supervisor-supervisee has mixed results as a result of working from home. van Zoonen et al. (2021) found that remote workers with low trust adapted more easily, perhaps because they benefited from being away from bullies or distrustful supervisors. Alternately, remote workers with trusting relationships may miss the enjoyable office relationships they no longer have at home.

Lack of Motivation

de Klerk (2021) did, however, find, that working from home without going into the office at all and for extended periods of time may lead to a lack of motivation and less than positive results.

Communication

Everyday interactions, the flow of information, and collaboration are all affected when workers are remote (Green et al., 2020; Bao, et al., 2020). Some managers reported having too many meetings when workers were remote (Ford, et al., 2021).

Technology

Working from home cannot occur without the proper technology to communicate with co-workers and customers, and the support and training that goes along with it (Green et al., 2020).

Social Isolation

Feelings of isolation made the transition to remote working more difficult (van Zoonen, et al., 2021; Green et al., 2020; Muralidhar, et al., 2020; Wang, et al., 2020) and is negatively related to job satisfaction for remote workers (Toscana & Zappala, 2020). Employees missed being able to walk over to a colleague's office to discuss things and attend impromptu social events at work (van Zoonen, et al., 2021) or go to the cafeteria (Ford, et al., 2021). It is more difficult to establish good relationships virtually due to a lack of proximity (Li et al., 2020). Social isolation was also positively associated with stress for remote workers (Toscana & Zappala, 2020). The pandemic also formed a natural barrier between employees and their supervisors, isolating them from resources that provided direction for their work, which has been found to decrease an employee's level of confidence in their work (Schaufeli and Bakker, 2004). The decision of when and how to reopen a business caused fear and anxiety when employees were unsure of how to follow health protocols and if they would offer security for their families.

Data Security Issues

Data security issues are also tricky to manage for WFA workers (Choudrury, 2020). When one of the authors did their dissertation on work-family policies, they were told by one of their participants that employees could not work at home because of the nature of the sensitive data, which could not leave the office. Since the pandemic, that sensitive data has gone home and organizations have had to adapt. Companies like MobSquad have been able to protect the infrastructure security of WFA workers. It took the pandemic, though, to provide the incentive to get it done.

Work Disruption

For those workers who have never worked from home before, the transition requires new competencies and skills that they need to learn, and these are experienced as barriers to adjusting to remote working; whereas those employees who have had experience working from home did not have the same negative experience (van Zoonen, et al., 2021), some types of workers experienced productivity losses, such as software developers (Ralph, et al., 2020). There are special challenges in industries such as banking in cross-training and repurposing employees for remote working for customer support (Adarkar, et al., 2020).

Technostress

Technostress is the stress that remote workers experience when they use information and communication technologies (Ragu-Nathan, et al., 2008). Molino et al. (2020) found that remote working, work-family conflict and work overload during the pandemic could predict technostress, and interventions in the culture and human resource practices could reduce that stress. Gabr et al. (2021) in their study of Egyptian academics found that women in rural areas who were lecturers or higher, had poor internet connection, and lower training in technology had increased technostress.

Work-Family Conflict of Remote Working versus Working from the Office

As Anderson & Kelliher (2020) put it, “Most of what we know about the gendered nature of flexible working, the individual and organizational outcomes, and factors affecting successful implementation, has come from research where employees have had varying degrees of choice in the decision to work from home” (p. 679). Intensification of work, long work hours, and an inability to disconnect from work can lead to increased work-family conflict (Green et al., 2020; Muralidhar, et al., 2020; Ford, et al., 2021).

For some parents, mostly mothers, being forced to work from home at the same time that childcare arrangements or school closures forced their children to be home at the same time, caused a high degree of work-family conflict (Anderson & Kelliher, 2020; Ralph, et al., 2020; Ford, et al., 2021) and inter-role conflict (Adisa et al., 2021) to occur. As a result of this disruption of child-care and education services, employees found themselves at home with school-aged children who needed assistance with their learning and younger children that simply needed quality time. Spouses and partners were also isolated from work and present in the home. The in-home demands increased as family members required three meals a day, adults struggled to work, and children engaged in online learning for the first time. Employees shared their workspace and equipment with family members, creating an unsuitable environment for work, especially for those who could not separate it from the living space (Raguseo, et al, 2016).

The addition of unplanned work at home increased the perception of conflict. Interruptions and distractions from work were unavoidable. Employees that struggled with dividing the two spheres experienced time management skills, not able to give each of them the right attention at the right time. They felt an obligation to remain connected both physically and mentally to both domains which resulted in a decrease in productivity and engagement as well as an increase in stress. Single parents felt an increased amount of stress to meet financial obligations (Beland, et al, 2021).

Sandoval-Reyes et al., (2021) in their study of Latin American workers found work-life balance decreased for remote workers they surveyed. For academic mothers, having children at home made it nearly impossible to progress in their research agendas (Lekchiri, et al., in press). McKinsey and LeanIn found in their study of 65,000 employees in the U.S. and Canada that one in three women were planning to downshift their careers or leave the workforce entirely in 2021 (Thomas, et al., 2021).

Not Everyone Can Go Remote

Can every organization go remote? Manufacturing companies may not be able to allow their workers to go remote unless they can employ certain strategies such as 3D printing and automation (Choudrury, 2020). The limiting factor is the willingness of senior and middle management. They need to support the initiatives needed to make WFA work in their organizations, and perhaps most importantly, model WFA themselves. Kaufman, et al., (2020), noted that certain industries are not as likely to be able to go remote, such as retail, manufacturing, and some service sectors.

SOLUTIONS AND RECOMMENDATIONS: MAKING REMOTE WORKING WORK

Management Support

Thanks to the pandemic, managers have seen that remote working can be productive and good for the worker and the organization; this has resulted in managers being less resistant to workplace flexibility. Dahik et al. (2020) found that more than 70% of managers surveyed were more open to workplace flexibility. Clear directions and common goals need to be reinforced for remote workers (Adarkar, et al., 2020), as well as sharing information rather than monitoring (Rymaniak, et al., 2021). Trust is needed between supervisor and supervisee for remote working to be successful (Muralidhar, et al., 2020; Rymaniak, et al., 2021). Managers also need to inspire, motivate, and encourage their remote employees (Gabr, et al., 2021), and lead effectively using virtual platforms instead of one-on-one in person meetings (Hancock & Schaninger, 2020). Managers also need to give praise and gratitude to their remote employees, making sure they do not feel unnoticed, unappreciated, or neglected (Phillips, 2020).

Organizational Culture

The organization's culture needs to be supportive of remote working (Arslan & Bektas, 2021; Plaskoff, 2017; Gigauri, 2020; Phillips, 2020). Employees also were found to need support from their organizations (Plaskoff, 2017). The playing field between remote employees and on-site employees should be level (Kaufman, et al., 2020). Moreover, cultural aspects such as the dependence on face time, the importance of hierarchy and personal relationships, and the prevalence of less diverse populations in organizations, should be reduced as much as possible in new cultures (Kaufman, et al., 2020). Zoom meetings have helped to humanize senior management, and they should continue to work remotely for part of the week to model hybrid working arrangements (Kaufman, et al., 2020), as well as promote a cohesive and unified organizational culture (Hancock & Schaninger, 2020).

Collaborative Tasks

Collaborative tasks can be made more productive for remote workers when social connectivity is created and maintained, both mental and physical health is monitored and up-to-date technology such as videoconferencing and project management tools are provided (Dahik, et al., 2020). Communication channels need to be transparent while team collaboration is encouraged (Pattnaik & Jena, 2020).

Social Connectivity

Challenges like communication problems and isolation can be addressed by using asynchronous methods like shared Google documents or a Slack channel for connections and conversations (Choudrury, 2020; Dahik, 2020). Job autonomy can help remote workers set up virtual social interactions and initiate social contacts (Wang, et al., 2020). Documentation that is accessible and transparent can be utilized for knowledge management and setting expectations (Dahik, 2020; Phillips, 2020). Isolation due to remote working can be reduced by setting up virtual water coolers, coffee breaks, or "Random Rooms" on Google Hangouts using GitLab; workers can randomly FaceTime each other to mimic hallway interactions (Dahik, 2020). Communication should be frequent, interactive, and meaningful (Li, et al., 2020). AI can be

used to pair up remote workers for chats or use virtual reality to allow workers to get together as avatars (Choudrury, 2020). Senior leaders should regularly facilitate virtual town hall meetings and gatherings (Hancock & Schaninger, 2020). When one of the authors worked at a Fortune 50 manufacturing firm in the '80s, they were told that if one employee worked on a different floor than another worker, it was the same as being in another building. Therefore, even in a physical office, contact with others is limited and needs to be planned. Workers in the same geographic area could also get together to socialize.

Many companies have used this opportunity to develop new strategies and processes to automate work areas and design more flexible cost structures, providing a roadmap to the reopening of businesses in the post-COVID-19 era (Caligiuri et al., 2020). While disruptions to in-person work were significantly eased by the accelerated procurement and use of digital tools that offered interactive experiences such as Zoom, the implementation of these flexible work mechanisms affected the well-being and productivity of employees, especially those with no prior experience working remotely or those that did not have the necessary equipment required for remote work. Employers must place the identification of obstacles, as well as of enablers, to well-being, job performance, and an employee's successful adaptation to virtual work as a priority (Carnevale & Hatak, 2020; Spurr & Straub, 2020).

Employee Health

To support employee health, counseling services can be provided, along with an onsite therapist and/or consultants (Dahik, et al., 2020). Mindfulness training may lead to improved employee outcomes such as improved morale and performance (Pattnaik & Jena, 2020). Employee health can be improved with wellness programs, online webinars, and work-life policies such as limiting work hours and scheduling meetings during set hours (Dahik, et al., 2020). Remote employees are particularly prone to the 24/7 culture of being available all the time, and need help keeping their workload manageable. Remote employees should keep clear boundaries between work and home and create a separate area for work apart from their home space and stick to a schedule for work, so it does not blur into family time (Gabr, et al., 2021; Kaushik & Guleria, 2020; Rudnicka et al., 2020). Remote workers should also build in breaks into their schedules (Rudnicka et al., 2020). Communicating with each other about work-family and childcare issues can also help build relationships and social connectivity, and ease social isolation (Li, et al., 2020). In Italy, working mothers used Zoom and other virtual platforms to support each other in communities of care; one Facebook community was called "Smart Mum," a group of women who gave advice to others on Zoom (Manzo & Minello, 2020).

A special case of employee health is providing access for neurodiverse remote workers, who need such accommodations as meeting agendas in advance, taking turns to speak in meetings, multiple ways of contributing to meetings, closed-captioning of meetings, transcriptions and recordings of meetings and the like (Das et al., 2021). These accommodations will be helpful for neurotypical remote workers as well.

Technology

Providing technology that mimics having all employees in the same place can help, as can providing employees funding for technology, office equipment, headphones and Wi-Fi costs (Muralidhar, et al., 2020; Ralph, et al., 2020; Rudnicka et al., 2020). Also important is having everyone Zoom in, not only the remote worker (Dahik, et al., 2020). Technology such as providing VPN and remote application access is of utmost importance in such industries as banking (Adarkar, et al., 2020). Internet speed and

connectivity is also critical (Kaushik & Guleria, 2020; Rudnicka et al., 2020). Training in remote technology is also important (Gabr, et al., 2020). Remote workers need to be comfortable with technology such as Zoom, translate work tasks into virtual modalities, and adapt their home environments to be able to work in (Hancock & Schaninger, 2020). Carroll & Conboy (2020) describe a framework called normalization process theory (NPT) that organizations can use to optimize technology for remote working.

Data Security

During the pandemic, many companies enabled secure work from a remote location; however what is needed is a risk assessment of when multiple actors complete tasks from various locations and devices (Kaufman, et al., 2020). Programs need to be developed that address behavior, culture, and awareness to develop cybersecurity. Access to sensitive information needs to be restricted, data access expiration dates need to be instituted, and multi-step approvals instituted, and access limited to set working hours.

Performance Management

Adjusting to remote working was easier when there was a high amount of work independence and when job criteria were clear (van Zoonen, et al., 2021). Performance management of remote workers is best done with output metrics or scores from internal customers (Kaufman, et al., 2020). Productivity must be effectively measured. Rewards such as promotions and bonuses need to be awarded the same way for remote and on-site employees.

Recruiting and Onboarding

In a hybrid workplace, organizations need to use new tools to recruit remote workers, such as video conferencing for interviewing and reviewing resumes electronically (Kaufman, et al., 2020). Recommendations to help with onboarding remote employees include asking them to keep their cameras on, having one-on-one meetings, having team building exercises, and assigning technology mentors (Rodeghero, et al., 2021). Virtual coffee chats, welcome videos, and networking can help in onboarding (Kaufman, et al., 2020; Ford et al., 2021). Hancock & Schaninger (2020) expect companies to continue to use remote interviewing for campus recruiting post-pandemic.

Organizational Learning Initiatives

The move to remote working has resulted in employees having to learn by force in organizations as workers have had to adjust to a new normal (Li et al., 2020). Professional development of and learning opportunities for remote workers will be needed (Li et al., 2020). In order to respond to changing market conditions, companies should invest in reskilling and upskilling employees (Kaushik & Guleria, 2020; Hancock & Schaninger, 2020). Training is needed in learning to lead remote teams and how to coach remote employees (Hancock & Schaninger, 2020). Self-discipline has been found to be an important skill for remote workers (Wang, et al., 2020) and should be an important goal for professional development.

PREVALENCE OF REMOTE WORKING AROUND THE WORLD

The Boston Consulting Group, in their survey of 12,000 employees from the US, Germany, and India, found that 40% of employees went to remote working and 60% want flexibility in how and when they work (Dahik et al., 2020). In Turkey, around 90% of its companies went either fully or partially remote (Arslan & Bektas, 2021). Indian banks also provided customer support remotely as well as other employees as a result of the pandemic (Perweij, 2020). In New Zealand, 29% of the workforce went to working remotely full-time (Green et al., et al., 2020). In Russia, before the pandemic, about 44% of women worked in remote industries, and while this grew during the pandemic, it will probably decrease again post-pandemic (Kalabikhina, 2020). In Georgia, the majority of organizations implemented remote working, although it was a completely new accommodation for employees (Gigauri, 2020). In Italy, all of its almost 60 million residents were told to stay at home, and millions of them had to negotiate to work their jobs from home (Toscano & Zappala, 2020). In Malaysia, all employees were on lockdown and worked remotely (Hashim, et al., 2020). Estimates in the UK range from 48-61% of employees surveyed worked remotely (Phillips, 2020).

However, in some countries, the transition to remote working was not as welcome, and the experience was not positive. In their study of Spanish, Polish, and Lithuanian workers, Rymaniak et al. (2021) found that organizations and workers were not prepared for the abrupt shift to remote working brought on by the pandemic.

Arneson (2021) provided some examples of companies globally that are going remote. Indian company Chargebee has gone completely remote—its employees can work where and whenever they wish. Productivity has grown exponentially, and although employees are happier and more motivated, they are not taking enough time off. Polish company Codility has a hybrid model, with most remote working and some hubs or common workspaces. Employees work wherever they work best; at home or in the office. TomTom, a global company, also allows its employees to choose either a remote work arrangement, or a few days in the office, or completely in the office. Work is centered around the job, not where it gets done. Paddle, a British start-up, has gone completely hybrid. Rather than calling everyone back to the office, they have everyone spend some time remotely and some time in the office. They have invested extensively in digital technologies to make this work. GitHub and Automattic are completely remote (Ford et al., 2021).

THE FUTURE OF REMOTE WORKING

In the future, work will most closely resemble a hybrid model, with employees working in both the office and at remote locations (Dahik, et al., 2020). In June 2020, the McKinsey Global Institute surveyed 800 executives around the world. They found that across all sectors, 15 percent of executives surveyed said at least one-tenth of their employees could work remotely two or more days a week, almost double the 8 percent of respondents who had allowed employees to work remotely before COVID-19 (Lund, et al., 2020). The Boston Consulting Group in their Workplace of the Future survey (Kaufman, et al., 2020) found that companies thought that 40% of their employees would be remote in the future, with 37% of them expecting 25% of workers or more in these hybrid models. These hybrid models vary from 0% remote to 100% remote, or WFA, with the hybrid models from 25-95% remote. 25-50% is alternating on-site, 50-75% is on-site on-demand, and 90-95% is connected remote (Kaufman, et al., 2020).

This was not consistent across countries, however; 20 percent of executives surveyed in the United Kingdom and Germany were at the one-tenth number while Chinese executives said 4 percent could. Extending remote work beyond two days a week, however, was less popular among respondents overall, with only 7 percent overall willing to extend remote work beyond two days a week, saying at least one-tenth of their employees could work three or more days a week remotely. However, de Klerk et al. (2021) found that the ideal ratio for employees was 2-3 days working remotely.

The potential for remote work varies by sector, with jobs in information and technology, finance and insurance, and management, having executives with a greater intent to allow their employees to work remotely. It is important to keep in mind, however, that more than 60 percent of workers in the U.S. economy cannot work remotely, due to their jobs requiring a physical presence.

The Economist Intelligence Unit (2021) conducted a global survey of more than 360 business executives, sponsored by Kyocera Document Solutions, on the implications of remote work on organizations, their employees and on productivity. They asked, “Is working from home (WFH) here to stay?,” and 66.7% of their survey respondents thought that WFH or remote work will continue in some form beyond the pandemic. They also asked what the preferred working arrangement would be, and the most preferred WFH ratio was to spend 30% of the time working at home and 70% in the office.

FUTURE RESEARCH DIRECTIONS

More research is needed to determine the conditions and industries where remote working in the digital age offers increased productivity to organizations and reduced work-life conflict for employees. Variables such as management support, organizational culture, collaborative tasks, data security, performance management, recruiting and onboarding, and organizational learning initiatives need to be further studied in the context of remote working. Both quantitative and qualitative research should be carried out to study how remote working can be more successful in the future.

CONCLUSION

Digital transformation will improve remote working opportunities in the future. For example, in academia, remote working has the potential to allow academics to contribute to society as their “whole selves,” reducing silos and improving female participation (Couch, et al., 2021). According to Darren Thayre, head of digital transformation and digital ventures, Japan and the Asia-Pacific, at Google, “I don’t think this is a Band-Aid moment where you just have to solve an issue for a few weeks, months, or years, and then we’re back to normal. I think the world will look very different, so I implore companies to think beyond just solving for the immediate fix day-to-day and to think bigger” (Economist, 2021).

According to Codility CEO Panowitz, “The repercussions of the pandemic have shocked the world into a more equitable and balanced workplace that is a far better fit for the future of the workplace. Simply put, for work to be at its best, it needs to fit into life” (Arneson, 2021).

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KEY TERMS AND DEFINITIONS

COVID-19: A coronavirus originating in China and first identified in 2019 causing respiratory illness and sometimes death. It became a pandemic in 2020 and is causing the deaths of millions worldwide.

Pandemic: A disease that spreads over the entire world killing millions of people. COVID-19 is an example of a pandemic.

Remote Work: Any type of work for pay that takes place outside of the office environment. It can take place at home, coffee shops, in your car, or any other location. Can also be known as “Work from Anywhere” or “Flexible Work Arrangements.”

Work-Family: Any number of issues arising from managing the boundary of one's activities when working for pay (work) and activities when not being paid (non-work), including with one's family life. In our chapter, synonymous with work-life.

Work-Family Interventions: Any number of interventions utilized by organizations to help employees manage their work-life boundary, including remote work options, childcare assistance, and other family-friendly programs.

Work-Life: Any number of issues arising from managing the boundary of one's activities when working for pay (work) and activities when not being paid (non-work), including with one's family life. In our chapter, synonymous with work-family.

Chapter 9

Virtual Management During COVID–19: The Need for Context and Competence Development for Virtual Managers Because of the Pandemic

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ABSTRACT

Before the pandemic, research on management at a distance, here called virtual management, was characterized by a “best practice approach” where there was little differentiation dependent on context. COVID-19 has meant that employees with insufficient competence and in unsuitable jobs must work remotely. A more context- or situation-oriented perspective on virtual management is therefore needed. The authors identify new characteristics of virtual management during the pandemic and identify relevant context factors. Another point marginally discussed in previous research is what kind of competence-developments leaders need post COVID-19. The research questions are answered through a qualitative study with semi-structured interviews of experts, such as consultants in new ways of working, together with interviews of experienced practitioners.

INTRODUCTION

Background

For the past couple of decades, researchers have shown an increasing amount of attention towards remote working, also called virtual working, defined as work performed outside spatial and temporal organizational boundaries and enabled by information and communication technologies (Athanasiadou & Theriou, 2021). A variety of terms, such as remote work, virtual work, digital work, distributed work, flexible work, telecommuting, telework and remote work arrangements, have been used, often

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interchangeably or with slight differences in meaning, to indicate ways of working in places that are different from traditional office spaces. Until now, remote or virtual work has been seen as an innovative work arrangement that is complementary to the traditional workplace organization and is often taken up voluntarily or on a temporary basis by a limited number of employees. None of the previous research dealt with a situation such as COVID-19. Now, telework has been done by a majority of managers and employees, it was mandatory, there was no, or limited face-to-face supplementation and we did not know how long this was going to last.

Research Gap and Research Questions

Previous research on virtual management before COVID-19 had some universal conclusions, independent of the characteristics of industries, organizations, type of jobs and the characteristics of the managers and employees. It was characterized in some ways as “a best practice approach” where there were universal solutions and recommendations. One reason for this could be the limited number of teleworkers before the COVID-19 pandemic, and often strong requirements to be a teleworker, for example, related to the characteristics of the job (independence, information work, etc.) and the characteristics of the employee (being independent, having worked a substantial time in the company, being digitally competent, etc.). Before the pandemic, teleworkers were therefore rather homogenous compared to teleworkers during the pandemic. The COVID-19 pandemic meant that the number of teleworkers increased significantly, and that people within occupations who were not previously recommended for telework had to work at home. Additionally, people who did not possess digital skills and were not independent had to work remotely. During the pandemic, teleworkers thus became more heterogeneous. We hence argue that management at a distance, what we call virtual management, has had to adapt to various context factors. The pandemic is a context factor in itself, but we also think that the characteristics of the jobs, the characteristics of the employees, and perhaps experiences in telework within the organizations, are some factors which will exert an influence on virtual management. Context factors therefore have to do with situations or characteristics of central variables, which might require adaptations and adjustments by the managers in remote work situations. We can also call this a “best fit” perspective to virtual management. The “best-fit” approach questions the universality assumption of the best-practice perspective.

During COVID-19, some changes of relevance took place for virtual management: Telework moved from voluntary to mandatory.

- The number of people working remotely increased significantly.
- A larger share of the remote workers/teleworkers worked at home, not at remote business locations, meaning that the balance between work and leisure became more blurred, thereby having an impact on the well-being of employees.
- People who did not have the required skills and appropriate jobs also had to telework during the pandemic. The effect was a larger heterogeneity among teleworkers, and significant variations in the perceived experiences, for example, between young people/employees and older people/employees (Ingelsrud et al., 2022).
- The competence of managers and employees on telework varied during the pandemic, because of differences in previous experience. The perception of changes could therefore be different.
- Before the pandemic, face-to-face communication was important in the media mix of managers and employees. During the pandemic, digital media - including the telephone - was the most

common media in use. Visual communication, such as videoconferencing, was not often used and was rather poorly used by most people. However, during the pandemic digital meetings through services such as Zoom, Teams and Skype were dominating.

These changes are some of the factors that could exert an influence on virtual management during the pandemic. Moreover, they probably require a more context- or situation-oriented perspective on virtual management. In this chapter, we want to identify the perception of changes in virtual management because of the pandemic. We also want to identify relevant context factors, such as some already mentioned above, and how virtual management should adapt to the context factors. And what are then the perceived needs for competence development for virtual managers, and the required support from the Human Resources (HR) experts?

We therefore want to contribute with systematized and updated knowledge through these three research questions:

- What are the perceived changes in virtual management during the pandemic?
- What context factors have been relevant for virtual management during the pandemic, and how should virtual managers adjust and adapt to these?
- What kind of competence development and HR support do virtual managers need?

The overall research question is: “What is new in virtual management during the pandemic, and is there a need for a situational perspective?”

The next section of this chapter is about the theoretical framework, followed by the methodological aspects, the presentation of data and then discussions and final comments.

THEORETICAL PERSPECTIVES

We divide this chapter into three parts: Firstly, a short summary of some central studies on virtual management pre-COVID-19. Secondly, some studies on telework and virtual management during the pandemic. Thirdly, a short summary of two relevant theories, which includes situational aspects: a general and well-known theory of “situational leadership”. At last, a theory on market segmentations, which we will adjust to apply in our context.

Some Characteristics of Virtual Management before the COVID-19 Pandemic

Virtual management is one of several terms used to describe a situation where there is a geographical distance between the manager and the employees, whether part-time or full-time. Other names applied are those such as remote leadership and e-leadership. Laaksonen and Bäckström (2022) define remote leadership as using technological tools to conduct leadership-related communication and interaction, as physical, face-to-face meetings are rare. The purest cases of remote leadership involve situations where the superior does not work at the same location as their subordinate and does not meet them daily or even weekly. The portion of their leadership work superiors who perform remotely can vary widely, e.g., 20% to 80%. During the pandemic, there were several cases with a full 100% remote leadership, but this is normally only the case for large international or global organizations with very long distances.

Contreras et al. (2020) argue that there are differences between the effects of teleworking on leadership vs. the effects on management. They define leadership as a process influenced by a superior on employees to achieve organizational goals, whereas management is about tasks such as planning, budgeting, control and establishing administrative procedures. Contreras et al. (2020) say that teleworking brings more challenges for leaders than managers. One important reason for this is that technology could more easily be applied in the administrative managerial activities. The word *management* is also often used as a broader term for all managerial activities, including leadership. We therefore want to use this word, as we have a focus on all managerial activities. And we use the word *virtual* instead of alternatives such as remote or electronic (e-leadership). We think that e-leadership is too focused on the role of technology for leaders, whereas remote only focuses on distance. Virtual management is a combination of collocated and remote activities, leadership and administrative activities. As a result, in this chapter we use the term *virtual management* to describe a situation with a geographical distance between the manager and the employees.

Some Topics Often Discussed in Pre-Pandemic Research on Virtual Management

Bergum (2009) summarizes previous research on virtual management, and also carries out three of his own empirical studies within one of the largest public organizations in Norway: The Norwegian Public Roads Administration. Two-thirds of the employees in this organization already have their manager at a distance, but both the manager and employees mostly work from another business location, and not at home. All the informants argue that management at a distance is different from traditional management, but only half of the respondents think that management at a distance is more difficult. Some of the main findings of the differences and characteristics of virtual management is that this type of management requires more planning, because it is not so easy to organize meetings and informal communication when you are not collocated. Managers must use more digital media, and they must be more conscious in their choice of communication media, because according to this study communication and feedback (particularly negative feedback) to remote employees are two of the toughest challenges in virtual management. Other aspects of communication are also different, such as less informal meetings and less small talks, and that meetings happen more rarely. Virtual managers need to trust and develop the remote employees to work more independently with less daily control and support from their virtual manager. Most of these arguments are supported in other studies of virtual management, such as Duckworth (2002) and Connaughton and Daly (2005), as well as Hambley et al. (2007). In earlier studies, particularly from the US (for example Klayton (1994), there is much more focus on how virtual managers should control remote employees/teleworkers, and also that important parts of managers jobs are the selection of suitable jobs and suitable employees to be qualified to be a teleworker. To formulate a telework strategy was also a central topic in the early phases of virtual management, during the 1990s and between 2000 and 2010.

What Happened to Virtual Management from 2010 to 2020?

Our main interpretation from the studies on this topic over the last decade before the COVID-19 pandemic is that many of the earlier findings are still relevant, such as the need for increased planning, the need to develop trust, an increased use of digital services and goals oriented management toward focus on output. Some changes are related to the fact that the number of teleworkers and virtual managers

has increased, even if the increase has been slower than expected. Technology has improved, there are more digital services and digital skills have improved. Mobile services have improved, and the focus is more on multilocal work compared to working at home. We should also notice that new types of organizational forms have been diffused, because of globalization, more specialization, more interorganizational cooperation and reorganization of public organizations, with less of a focus on regional units.

Management has moved towards self-management and trust-based management, and organizational culture is less concerned about control. The competence level in society, organizations and management has increased, and employees are now more independent. Despite these enabling factors for telework diffusion, the public interest and the number of research projects is lower than before. A comment could also be made about the general attitude to virtual management: Before 2010, most studies on virtual management include mostly negative characteristics and effects, while traditional face-to-face management is regarded as the “best solution”. After around 2015, we notice some more positive aspects in studies, such as the possibilities to reduce managerial travel, and to get rid of some administrative tasks and concentrate on the more strategic issues.

Studies on Virtual Management during the COVID-19 Pandemic

There have been several studies on virtual management during the pandemic. Based on studies such as Laaksonen and Bäckström (2022), Ingelsrud et al. (2022), Contreras et al. (2020) and Hamouche (2021), supplemented by my own observations from the supervision of approximately 10 Bachelor and Master Theses. Some of the same arguments used before the pandemic are still used, such as the need for good communication skills, the need to build and develop trust and challenges related to innovation, as well as maintaining organizational culture and affiliation. For example, in the study by Laaksonen and Bäckström (2022), we also observe that there are several positive effects of virtual management, also more than we have reported before here, such as: no time spent on commuting, sharing information is faster and more real-time, e-communication is reliable, work is more efficient and productivity has increased, organizing meetings are easier, expressing oneself and opinions is easier and there are fewer interruptions at work.

Laaksonen and Bäckström (2022) are one of many studies that have identified an increased focus on individual differences in the perceptions and experiences of the effects of the pandemic, thereby requiring more individualization of managerial support. Examples of these different individual experiences are between old and young employees and employees with a long vs. short tenure within an organization, as well as employees who live alone vs. employees who live together with others (Ingelsrud et al., 2022). There will be more about this later in this section. The use of digital communication services is much higher than before. In all four references above, as in most others, there is an increased focus on the need for managers (and remote employees) to have good digital skills.

An Increased Focus on Individual Employees in Telework

Studies described earlier have focused on the characteristics of the tasks, divisions and balance between digital and in-person activities, in addition to the grouping of subordinates of employees into the individual, internal group/team and external actors. One characteristic rarely discussed is about personal differences. Several studies during the pandemic, such as Ingelsrud et al. (2022) and Laaksonen and Bäckström (2022), have shown that experiences with remote working/home office have varied significantly during the pandemic. People who are most dissatisfied are young people with limited experience

in the labour market or within a particular organization. These people are dissatisfied because they do not have a network of employees that can support them at a distance. They feel it is much more complicated and challenging to contact employees they do not know so well via digital communication, compared to a situation where they can just go to another office and knock on the door. Asking colleagues digitally requires more planning and is more formal. We can also add additional personal characteristics such as the quality of the home building, if the remote worker is married or not, or whether they have children. People who live by themselves often feel much more isolated when working much at home, whereas there are mixed results related to having children. Some think that the family situation is improved because of more flexibility, while others think it is hard to work at home when their children are also at home (Ingelsrud et al., 2022).

Several recent studies have claimed that leaders must be aware of relevant personal characteristics beyond simply professional competence: This refers to young people living alone, with a small apartment without their own space for working, who are less satisfied than others. Virtual managers must find out about such characteristics and give these young people additional support if wanted and agreed upon. In some ways, individuals were important before the pandemic too, but mostly related to the selection of who is qualified for telework.

Increased use of Digital Services

In studies of virtual management before the pandemic, the role of technology for managers has been rather limited, and mostly focused on e-mail and telephone, besides face-to-face communication. During the pandemic, face-to-face communication has been significantly reduced or eliminated, with digital communication with Zoom, Teams and Skype having drastically increased (Ingelsrud et al., 2022; Laaksonen & Bäckström, 2022). Some of the discussion points have been related to the potential for digital services, the use of digital services for applications that were generally not recommended before the pandemic, such as digital onboarding and digital communication for employee appraisal interviews. Moreover, the phenomenon of “Zoom exhaustion” (Jiang, 2020), where technology is used too much, has been widely discussed and explained. There have been few theoretical discussions related to digital meetings and the managerial selection of communication media during the pandemic.

What other Conclusions are Found in Research on Virtual Management during the Pandemic?

The shift towards trust-based management is a typical organizational change that the literature emerging from the COVID-19 context points to as an important premise for successful teleworking (Contreras et al., 2020; De Paoli, 2020). The spatial redesign of organizations towards higher degrees of telework can also put considerable pressure on maintaining the organizational identity of the organizational community, as telework may undermine a sense of belonging to the workplace. It may also hamper the knowledge flows necessary to sustain creative and strategic processes, and it may undermine well-functioning teams and work relationships in a more individualized work environment (Contreras et al., 2020). Our impression is that many of the findings and recommendations for virtual management are quite similar to findings before the pandemic, but a big difference is the increased focus on digital meetings, the need for individual adjustments, different experiences and more of a focus on work-life balance issues.

What kind of research topics have we missed? Because parts of our research questions are related to competence development for virtual managers and the need for support from HR, we are surprised that these are rather marginal topics. Some conclusions from some of these are referred to, as we see that required skills for virtual managers are often related to communication, trust, relationships and digitalization. Few studies have focused on competence development for virtual management, and how the HR department should support virtual managers.

Competence Development for Virtual Management

Because teleworking and working at home has been rather limited before the pandemic, there has been a limited amount of discussion and studies on the need for specific knowledge development and learning courses for virtual managers. However, there has been some studies which have looked at the skills needed for virtual managers. One such example is DasGupta (2011), who carried out a literature review on 77 studies on virtual management, and mentions some of the new skills that these studies say virtual managers should have:

- Stronger written communication skills because of the use of e-mail
- Stronger social networking skills
- For global virtual teams they particularly mention a global-cultural context
- A stronger sensitivity about the mindset of employees

There are several other studies on the recommended or required skills for virtual managers, with most of them mentioning the need for trust-based leadership and empowerment/self-management, to develop good communication skills, including on digital media. This also included new types of communication media, and to find a balance between digital media and analogue media. Other aspects of communication are also mentioned, such as the need to provide specific feedback through digital media (Laaksonen & Backstrøm, 2022; Ingelsrud et al., 2022).

We see in studies made during the pandemic, such as Laaksonen and Backstrøm (2022), that some of the development needs in virtual management are related to the handling of technology tools and its applications. They also recommend that practices related to video communication should be clarified, and that the ground rules related to virtual management should be clarified. The culture of virtual management should be implemented better in practice, and virtual management should be taught as part of the basic studies in management.

Yet, we find limited information on what topics should be covered in such courses. Most studies on competence of virtual managers have been provided by consultants, such as McKinsey, Deloitte and Ernst & Young, and have consisted of topics such as: what are the special characteristics of virtual management, communication issues, how to empower the remote workers, technological issues such as how to use different communication media and how to run a digital meeting. Other topics are how to not only support the individual worker, but also to maintain organizational culture and affiliation in a period where employees are geographically distributed.

The Role of HR

Contreras et al. (2020) say that there have been rather few studies on the effects of- and the role of HRM during the pandemic. They refer to some articles on the need for HR to support managers in how to develop digital onboarding, and how to support managers to handle new employee expectations for work locations. HR can also be used to develop new communication protocols and procedures, be responsible for activities related to culture and cooperation and also take initiatives to discussions about the “new hybrid working normal”.

A Theory on Situational Leadership

A situational manager is one who can adopt different leadership styles depending on the situation. Hersey and Blanchard (1969) developed a model for Situational Leadership in the late 1960s (Hersey & Blanchard 1969). Factors which affect situational decisions include the motivation and capability of subordinates, or what they call followers. They said that the leadership style of the manager must correspond to the development level of the subordinate, and it is the manager who must adapt. Leadership style is characterized in terms of the degree of direction and support given by the manager to his/her subordinate. There are four leadership styles that match the development levels of the subordinates. The four styles suggest that leaders should put greater or less focus on the task in question and/or the relationship between the leader and the subordinate, depending on the development level of the subordinate. The four leadership styles are defined in this way:

- Supporting leaders.
- Delegating leaders are still involved in decisions and problem-solving, but control is with the follower.
- Directing leaders define the roles and tasks of the subordinate and supervise them closely.
- Coaching leaders still define roles and tasks but seek ideas and suggestions from the subordinate.

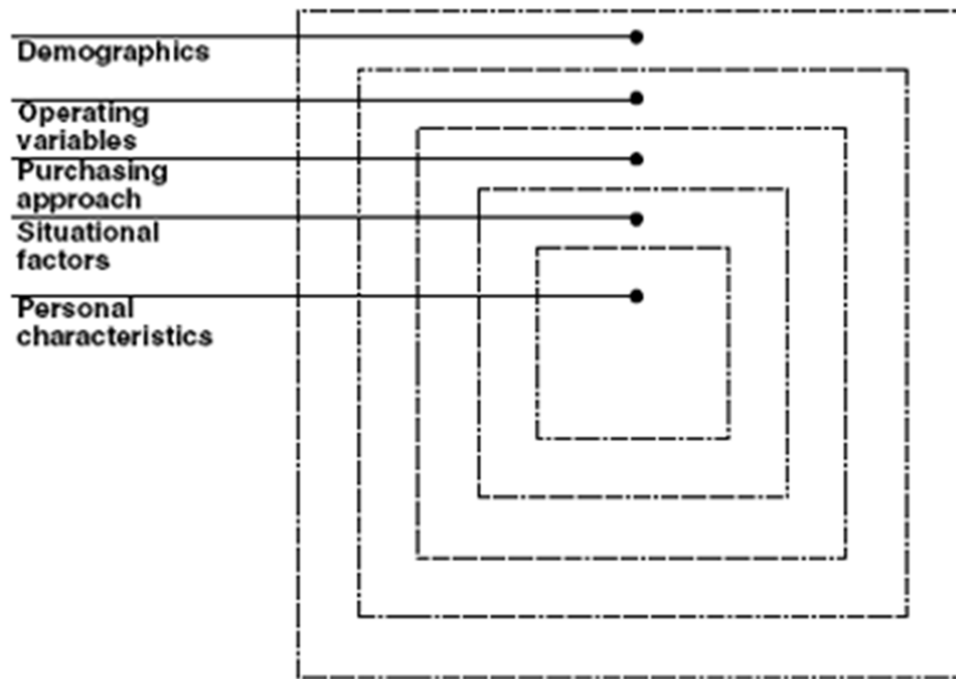
In the telework literature, subordinates are traditionally assumed to have a high commitment and high competence to be a suitable teleworker (Nilles, 1998). A delegating type of leadership should therefore be relevant. It will however be interesting to see whether other types of leadership are applied during the pandemic, when there is a more diverse group of teleworkers.

A Theory of Market Segmentation

Shapiro and Bonoma (1984) developed a model in marketing management in how suppliers and service providers can work to divide and segment their market. This model will be applied as an inspiration and framework for our attempt to analyse how virtual management could be adjusted to different context factors. The model by Shapiro & Bonoma (1984) is called the “nested approach to market segmentation”. The idea is to have a model or approach where you can move your analyses from some macro and quantitative variables into more specific and detailed variables, dependent on your ambitions and possibilities for data. The original model consisted of the following “nests”: demographics, operating variables, purchasing approach, situational factors, and personal characteristics.

Figure 1. The nested approach to market segmentation

Source: Shapiro & Bonoma (1984)



We intend to discuss about context factors in virtual management, but we could alternatively have called this a segmentation of how to manage at a distance. Our research question is about the need to differentiate management, according to some variables or conditions/situations. This process can also vary according to ambitions/goals and available information. Not all variables by Shapiro & Bonoma (1984) are relevant, such as “purchasing approach”. But some of the other variables might be relevant. This model can be used as a framework to explore and structure a system at different levels, and we can discuss what is relevant and possible to discuss according to our data.

METHOLOGICAL CHOICES

Introduction: A Qualitative Study

This chapter has been based on a qualitative study for which the goal is to acquire in-depth insight on how the COVID-19 pandemic has affected the characteristics of virtual management. A qualitative design was chosen because we wanted to go deeper, and because the topic of the situational aspect is not easy to quantify, e.g. in a questionnaire.

Data Collections

To answer the research questions, we chose a two-stage process, in which we started to carry out a number of interviews with some virtual managers in August 2021. The second stage was in the fall of 2021, where we had some selected interviews with experts on virtual management, including both practitioners and consultants.

The two steps are briefly described here:

- a. We conducted semi-structured interviews with 18 virtual managers from five organisations. 11 managers came from three public organisations, and 7 managers from two private organisations.
- b. The second data source was five expert interviews. Our experts were three consultants knowledgeable in new ways of working and virtual management, and two middle managers who have been practicing virtual management for more than two decades.

The selection criteria were based on our long experience in doing research on this topic. Our interviews of the practitioners in the first category work in relatively large organisations in Norway, with the criteria being that they were willing to participate and have extensive experiences with remote working and virtual management during the pandemic. The three consultants were carefully selected among consultants who were offering relevant services within telework, home office and virtual management. We knew four of the informants from studies of virtual management before the pandemic. The experts, particularly the three consultants, are our key informants, because they have a long experience from many organisations, both before and during the pandemic.

Questions Asked

The core questions in all three studies were:

1. What is the difference between virtual management and «ordinary management»?
2. What is new in virtual management during the COVID-19 pandemic compared to the situation before the pandemic? What has been learned?
3. What kind of competence development is required for managers when there is a geographic distance between managers and employees?

In our interviews with the experts, we also added the following question:

4. An argument now is that to a larger degree virtual management had to be adjusted to different context factors. What can be such context factors, and what examples are there of how virtual management can be adjusted to different context factors?
5. How can the HR-function support virtual management?

Evaluations of Methodology: Reliability and Validity

The methodological soundness of a scientific study is often discussed using the terms validity and reliability.

Sykes (1990) states that reliability in qualitative research is related to two questions:

- Question 1: Can the same study show the same results if two different researchers are conducting it?
- Question 2: Can the study be repeated by the same researcher and respondent with the same findings?

Reliability: In qualitative studies the researcher is an important factor in the measuring instruments used in data-gathering. Interpretation is a central part of the researcher's work, with the researcher's role in influencing the results of the interviews also being important. According to Ödman (1979) and Norén (1990), a requirement for reliability in case studies is an extensive documentation. Norén (1990) argues that it is important to state the kind of relation of the researcher towards the respondent. In our study, interpretation is very important, and we have a deep understanding of this topic. We know most of the experts well, and this makes it hard to repeat the studies. But we have mentioned the questions, which are positive for reliability, even if questions are rather general. On the other hand, timing during the pandemic means that conditions are hard to duplicate for a future study. There are therefore several threats to reliability in this study. Another factor is that both the researcher and many of the informants are very experienced: if a younger and less experienced researcher had asked the questions, perhaps the interpretation of e.g. "what is new?" might have been different. More experience could mean that we have stronger requirements to call it "new" compared to a younger researcher.

Validity describes the relevance of data for the problem in a study. The strength of qualitative research is in the flexible and direct interaction between the interviewer and the respondents (Sykes, 1990). Questions can be clarified for the respondent, and the interviewer has the possibility of following up interesting answers to obtain more detailed information. In our study the main strengths related to validity is the competence of the researcher, the different sources for data collections, and in particular the quality of the experts. We discussed the main questions of situational aspects and competence requirements for virtual managers with some of the most skilled people on this topic in our country. Based on these factors, the validity in general can be deemed to be good.

What about relevance and generalisations, beyond the studies here: According to Mehmetoglu (2004), unlike generalisability, transferability does not involve broad claims, but instead invites readers of research to make connections between elements of a study and their own experience. Our results are not generalized facts, but rather understandings of the interviewed managers' interpretations of managerial work and changes because of the pandemic in the particular contexts of the chosen sections in the selected organisation. Our sample is not large, but transferability, or some type of external validity, is strengthened through our interviews with experts who have a large network across many organisations.

PRESENTATION OF EMPIRICAL DATA

We choose to start with the interviews with the experts, and then the virtual managers.

Some Main Findings from the Expert Interviews

What is New in Virtual Management during the COVID-19 Pandemic Compared to the Situation before the Pandemic?

Some of the experts claimed that the pandemic showed that managers were generally good at managing crises, particularly in relation to planning and the administrative aspects. This was because many managers have a background in finance and engineering. As previously stated, most informants argued that virtual management was generally more challenging than traditional management. The most common challenges mentioned were related to maintaining trust and social relationships, and to discover whether remote employees had problems, either professionally or socially. And during the pandemic, this was made even more complicated because home working was mandatory, involved more people and had larger uncertainties.

One expert told us that the biggest surprise was how well managers adjusted their behaviour, while another expert was surprised at how managers relied on face-to-face communication and co-location. These had problems adjusting to virtual management and the home office. Another respondent said that what had surprised her most was changes in attitudes on what was possible to do digitally. For example, many leaders were negative about doing telephone-based customer service from home before the pandemic, but this turned out to be rather unproblematic. One of the experts said there were few surprises, and this answer came from a respondent who had a significant amount of experience in virtual management. Previous experience therefore matters.

What Kind of Competence Development is Required for Virtual Managers?

It is important to notice that three of our experts worked in large public organizations with an extensive use of telework for a long period of time, though none of them had experienced a formal internal programme for virtual management. Nonetheless, our two consultants had extensive experience with different types of competence development for virtual managers.

All the experts said that competence in digital services was important, the reason for which being that digital meetings had been such an important and integral part of manager's jobs during the pandemic. Some of them said that this meant having basic skills on how to use and combine communication media, including digital meetings. Our most experienced informant said that knowledge about relational leadership, empowerment and communication, as well as motivational behaviour, was equally important. She also emphasized learning about management of the digital meetings beyond the technical aspects, such as virtual process management, how to maintain team spirit virtually, virtual collaboration, how to communicate digitally and having a digital mindset. Managers should also be aware of the differences between mandatory and non-mandatory telework. This expert, who is a consultant on this, emphasized that it is not enough to learn about the technical and functional aspects of digitalization. In order to change processes and structures, managers must also learn to balance between human aspects and technology. Most experts said that traditional leadership competencies were the most important things, but that there should also be a focus on the special requirements related to virtual management, i.e. the importance of clear communication, both analogue and digital, to develop independence and autonomy for remote employees, and to develop an affiliation and common culture based on some common values. Lastly, all the informants emphasized the need for structure, together with flexibility.

The Relevance of a Situational Approach in Virtual Management

Some situational factors are already mentioned by the experts, although they do not explicitly call these contextual or situational. We will integrate these comments into our analyses later on. This specific question was perceived as a difficult question, with the exception of two of our consultants. One of them said she often differentiated between situational factors and individual factors. For instance, the varying requirements in the different time phases during COVID-19 are examples of situational factors related to time. Another situational or context factor is also type of organizations, in which relevant factors could be the potential for telework or having the skills for telework. These factors will have an impact on implementation, satisfaction and effectiveness. Informants argued that the potential for telework varied between industries, where IT- and service industries have a large potential for telework, opposite of for example social services and some manufacturing and production companies.

Regarding individual factors, our most experienced informant agreed that this was important, but she was not sure whether this was more important now than before COVID-19. Another of the experienced practitioners disagreed and said that individual follow-up/support by the manager was one of the significant changes compared to the pre-COVID-19 situation. And this was particularly relevant for this informant because he had extensive experience on management at a distance. But this was remote work at another business location, not from home. For him, the changes because of the pandemic were not that significant, but it added challenges because the teleworkers at home felt alone without stronger interactions with colleagues. In addition, it was important to be able to balance work and family, and to overcome the challenge of a physical office layout that could hamper effectiveness. The other experts also thought that individual follow-up was one of the significant changes in virtual management during the COVID-19 pandemic, because some employees without sufficient autonomy were not able to work from home without being monitored closely. Informants mentioned particularly emotional support and social support.

Interviews with Virtual Managers

We conducted semi-structured interviews with 18 virtual managers from five organizations. Eleven managers came from three public organizations, and seven from two private organizations.

What is “New” in Virtual Management during the COVID-19 Pandemic?

Here, we asked the respondents how virtual management during the pandemic compared with their situation before the pandemic?

We must begin by saying that what is “new” is not objective. What many see as new, is based on their own experience of virtual management. Even if most of our informants are experienced virtual managers, several of their answers are “not new” from a scientific point of view. We will cover more of this in the discussion section. We will just mention that arguments such as:

- Virtual management requires more: planning, more trust, more use of ICT/digital services and more self-management by the remote employees, will not be explored further

- And many informants talk about the importance of and the challenges with communication at a distance, particularly related to feedback, relational aspects and complicated HR-tasks such as innovation/creativity as well as on conflicts.

Lack of Face to Face Alternatives:

Several of the informants said the fact was that to remotely work from another location or home, with no or limited access to the office, was new to them.

Mandatory Telework during the Pandemic

Some informants also mentioned differences between voluntary telework and non-voluntary telework.

A Larger Number and a More Varied Population of Teleworkers

There is also such as the larger number of employees working at home. Many of these employees working from home have a job which is not very adjusted to remote work. And some of the employees are not that independent and have a short work experience from the company, and therefore a limited network of colleagues. Having said this, most informants thought that managers were rather good in adapting and change to the new situation.

All these three factors, lack of face to face communication, enforced telework, and a larger population with jobs and competence which are not ideal for telework, can explain why virtual managers perceive their jobs as more difficult and challenging than before the pandemic.

Many managers mentioned changed attitudes and improved skills in digital meetings. As one manager said: "What we as leaders have learned in relation to running a digital meeting is quite enormous." Some of the informants talked about "Zoom exhaustion" and technical problems, though many of the informants thought that technology use improved during the pandemic.

Another comment on technology is that managers had to apply digital services in situations which were not recommended pre-pandemic, such as in recruitment, onboarding, performance appraisal interviews, creativity meetings and in other complicated HR practices. Experiences are somewhat varied; for example, some digital applications in recruitment were regarded as successful, whereas the use of Zoom for informal and social lunch or morning meetings was not continued after the first couple of trials. Another new aspect was that remote work before the pandemic could mean working from another business location than the manager, while during the pandemic the home office was the primary remote location. One effect of this is the blurring of boundaries between work and private life. And working at home compared to working at another location of the organization meant that the technical infrastructure and support from colleagues were reduced. When employees work at home, virtual managers must know more about the employee than just aspects related to working life. But, on the other hand, the manager should be aware of the limits to privacy, so there is a balance between support and control.

What Kind of Competence Development is Required for Virtual Managers?

We were a bit surprised when most of these informants did not have a good answer to this question. None of our informants had received a formal education or training in virtual management. Nevertheless, all

the informants had some training in the technical and functional aspects of digital meetings and digital services, such as Zoom, Teams or Skype. In addition, some of the informants had an informal education, as they discussed together in their groups about the possibilities and challenges in digital services. One of the informants, working in a large public organization, said that they had a guest speaker from another public organization talking about their experiences with virtual management.

When we followed up after the description of status about the future need for competence development in virtual management, we received mixed answers. Some had no clear ideas, while others said that virtual management was almost the same as traditional management, and therefore no special attention was needed. A small group argued that there should have been a special focus on virtual management as part of traditional leadership education to address the special requirements, and to increase the effectiveness of, e.g., digital meetings. These people thought that they thus far had not applied digital services to develop the organizations like in a digital transformation, but only replace manual processes with digital ones without changing processes and organisations. They also thought that the challenges in virtual management related to communication and handling complicated HR tasks needed to be addressed, supported and coached by experienced advisors.

Situational Virtual Management?

In the interviews of managers, we only interpreted their answers indirectly through their answers on other questions. Here are some of our reflections.

Individual Adjustments

What was the easiest observation on the adjustments to individual employees? Several of the informants said that some employees needed additional support. This could be due to their family situation with many children, poor housing situations or that they lived alone and felt lonely. Some of the managers had structured follow-up dialogues, in which they registered how often they talked to their home workers. Other managers said that they were always available, and employees could call them immediately when needed. The new aspect in their stories is that the individual support from virtual managers is not only to support employees who are not very competent or independent but is also related to their total life situation. Virtual managers therefore need to know more about the employees than just their job skills. At the same time, there is a limit of how much the virtual manager should know about the private life of an employee working from home. This is one of the dilemmas of virtual management, as there needs to be a balance between individual support and control.

Adjustments Dependent on Previous Experience and Future Goals

Some managers had practiced virtual management before the pandemic, and they thought that virtual management was not that challenging. Managers who had limited experience, as well as a preference for face-to-face communication before the pandemic, had a much more difficult transition to virtual management when face-to-face meetings were not possible.

We also noticed that organizations varied according to their digital maturity, their business goals and ambitions for digital transformations. One organization in particular had ambitious goals and considered digital meetings and telework as strategically important. They thought that the processes and leadership behaviour had to change to improve organizational effectiveness.

DISCUSSIONS

What are the Perceived Changes in Virtual Management during the Pandemic?

We must begin by saying that what are changes and “new” is not objective. What many see as new, is based on their own experience of virtual management. Even if most of our informants are experienced virtual managers, several of their answers are “not new” from a scientific point of view. Our impression is that many of the findings and recommendations for virtual management are rather similar to findings before the pandemic, but a big difference is the increased focus on digital meetings, the need for individual adjustments, different experiences and more of a focus on work-life balance issues. Most informants argued that virtual management was generally more challenging than traditional management. And during the pandemic, this was even more complicated because home working was mandatory, involved more people, had larger uncertainties and often required more individual support of remote workers. This is in accordance with other studies, referred to in the theory section, such as Laaksonen and Bäckström (2022), Ingelsrud et al. (2022), Contreras et al. (2020) and Hamouche (2021). Some of the same arguments used before the pandemic are still used, such as the need for good communication skills, the need to build and develop trust and challenges related to innovation, as well as maintaining organizational culture and affiliation. We however notice that some of the authors, for example Laaksonen and Bäckström (2022), also mention several positive effects of virtual management, more than we have noticed before (Bergum, 2009), such as: no time spent on commuting, sharing information is faster and more real-time, e-communication is reliable, work is more efficient and productivity has increased, and there are fewer interruptions at work.

Regarding changes in managerial work, Laaksonen and Bäckström (2022) are one of many studies that have identified an increased focus on individual differences in the perceptions and experiences of the effects of the pandemic, thereby requiring more individualization of managerial support. This is also supported by most of our informants, even if one informant also thinks that this was the case before the pandemic.

The use of digital communication services by the managers is much higher than before. There is an increased focus on the need for managers (and remote employees) to have good digital skills. Digital skills are important for managerial trust, some informants say. Another comment on technology is that managers had to apply digital services in situations which were not recommended pre-pandemic, such as in recruitment, onboarding, performance appraisal interviews, creativity meetings and in other complicated HR practices. This corresponds to the findings by Hamouche (2021). Our informants did not agree on the future use of digital services in complicated HR-practices. Variations in opinions are affected by the experiences and the skills of the informants.

The answers from our informants told us that the perception of changes varied, depending on their leadership style, their previous experience with virtual management and on their abilities to adjust to the new remote context. This is also similar to the findings by Ingelsrud et al. (2022). One of our experts told us that the biggest surprise was how well managers adjusted their behaviour to digital contexts, while another expert was rather surprised at how managers still relied on face-to-face communication and co-location. A third informant said that what had surprised her most were the changes in attitudes on what was possible to do digitally. We therefore see that there are variations among managers experiences too, not only variations in experiences among employees. Another new aspect was that remote work before the pandemic could mean working from another business location than the manager, while

during the pandemic the home office was the primary remote location. One effect of this is the blurring of boundaries between work and private life. When employees work at home, virtual managers must also know more about the life of the employee beyond work, though balancing against control and privacy. This is not so much addressed in previous research.

How to Adapt Virtual Management to Different Contexts?

It seems rather obvious that this question has been more relevant during the COVID-19 pandemic. A primary reason for this is that the number of teleworkers at home has grown, and these have worked full-time or a major part of their working time at home. An effect of this is a larger heterogeneity among the teleworkers, as employees who worked at home before the pandemic were fewer, worked less hours and voluntarily selected this work arrangement. We can assume that most of the pre-COVID teleworkers mostly saw the benefits, had jobs which were suitable for remote working and were able to work rather independently. This is according to the requirements mentioned in many of the early telework studies. The COVID-19 pandemic changed and removed these characteristics, as well as some conditions we know from manuals, handbooks and research for successful teleworking before the pandemic (Klayton, 1994; Nilles, 1998; Bergum, 2009).

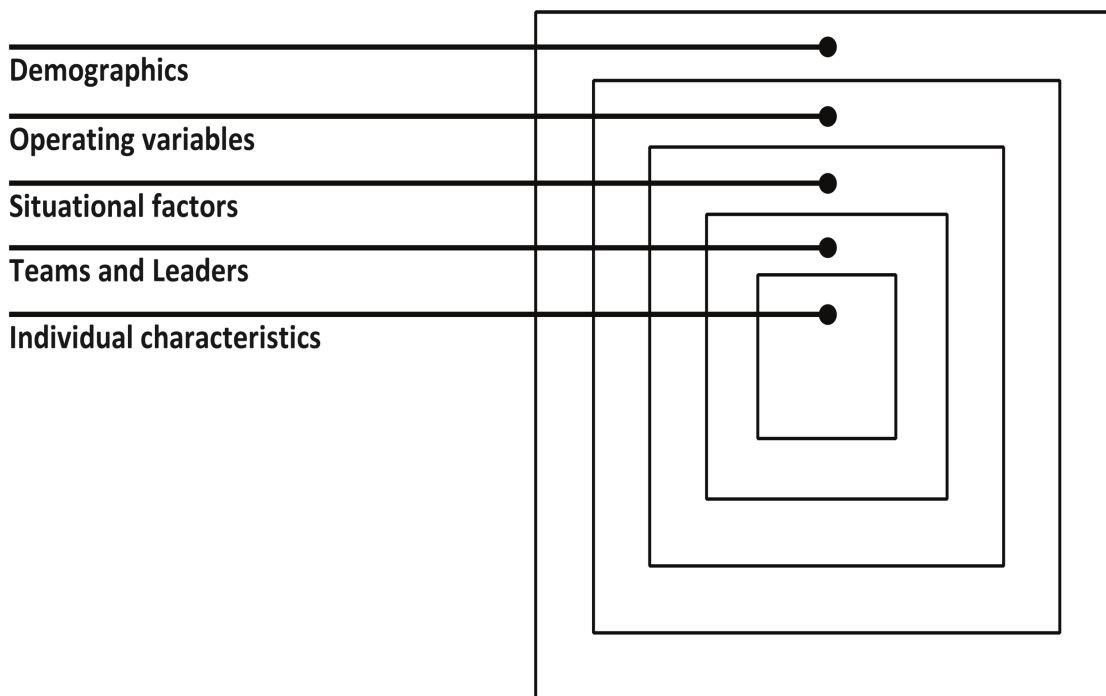
As we have mentioned in our theory section, the most common theory on situational leadership is related to characteristics of the employees, particularly their competence and motivation. Leaders should then differentiate their leadership to better support such employees. In our study, these characteristics of the remote employees were also relevant, even if the characteristics are more related to working conditions and family situations. The context in virtual management can therefore have interpretations other than the characteristics of the employees. None of the virtual managers talked explicitly about contexts, but all the experts talked about this. One of the experts differentiated between situational and individual factors, but we regard both as important contextual factors. It is hard to rank the context factors, so our aim is to identify potential context factors, describe them briefly and then indicate briefly needed adjustments for virtual managers.

In the telework literature, subordinates are traditionally assumed to have a high commitment and high competence to be a suitable teleworker (Nilles, 1998). A delegating type of leadership should therefore be relevant, according to Hersey and Blanchard (1969). We notice from our informants that management during the pandemic is more based on trust and self-leadership, where the remote employees are awarded more autonomy than before, and the focus of leadership is more on results rather than detailed control of processes. We also see the relevance of another category of the theory by Hersey & Blanchard (1969) for subordinates at the home office who not have high scores on commitment, because of extra challenges to manage the new work situation. They still have enough competence for the job, perhaps not on digital skills, but jobs are not changed. The supportive type of leadership seems to be the most relevant type of leadership for such “non-independent teleworkers”. The other two types, directing and coaching are not that relevant, as the employees in our sample have enough competence, as they held the same positions as before the pandemic. The exception might be that a more directive leadership could be necessary for supervision of inexperienced employees with limited networks, in their onboarding period.

Virtual Management Contexts based on “The Nested Approach” to Market Segmentation

As said in the theory section, we will structure and adjust part of our analyses and discussion on the market segmentation model by Shapiro and Bonoma (1984). The idea is to have a model or approach where you can move your analyses from some macro and quantitative variable into more specific and detailed variables, dependent on your ambitions and possibilities for data. This model can be used as a framework to explore and structure a system of context factors at different levels, and we can discuss what is relevant and possible to discuss according to our data.

Figure 2. A nested approach to virtual management
 Source: Bergum (2022), inspired by Shapiro & Bonoma (1984)



We do this differently than recommended by Shapiro and Bonoma (1984), and start with the “inner nest”, because the individual characteristics seem to be the easiest to identify.

Individual Characteristics

Our main focus is on employees. In previous telework studies before COVID-19, the characteristics of employees were mostly relevant in the recruitment processes. Teleworkers should possess abilities and competencies such as independence, be able to do self-management and to be allowed to telework (Nilles, 1998). One of the few studies on the virtual management of “non-independent” teleworkers was done by Bergum (2009), when a large Norwegian public organization underwent reorganization,

with two-thirds of their employees having their leaders at a distance. Many of these were not used to this, were not independent enough, with extra leadership support being one of the solutions to this new situation. We then see the relevance of the traditional theory of situational leadership, in which leaders must adapt their leadership style because of a lack of skills or lack of motivation. In our study, the individual adjustment and extra support toward remote workers at the home office is one of the most significant results. But there is a different reason for this compared to earlier studies: We do not hear much from our informants about inadequate formal knowledge. The arguments from the managers for extra support, particularly emotional and social support, is due to a more challenging working situation at home because the presence of children, having non-satisfactory housing conditions or because people live alone and feel lonely and isolated (Igelsrud et. al, 2022). The adjustment of virtual management towards more individual support is therefore more directed towards “the total human being” compared to a focus on only work-related competences.

Leader Characteristics

This “nest” is at a higher level than the individual level, and we talk about a group of people within an organization. Our focus here is on the leader as the person responsible for a group of people. We do not have enough data on teams or groups, so we do not take up this discussion. We have already discussed managerial adaption to employee differences during the pandemic. We must admit that the adjustments, or differences in virtual management style, are most clearly seen in relation to adoption to various employee needs. Do we see other reasons for differences in virtual management? Are there different virtual management styles in different types of organizations? We noticed that informants mentioned a different grade of challenges for different organizations: One of our highly experienced virtual managers, practicing for several decades, said that their transition to virtual management was rather incremental. They were used to operating mostly in a digital and virtual way. Their primary change was not to move from collocated to remote management, but that employees and managers should move from remote offices to the home office. We must also add that even though there is almost an agreement on trust-based virtual management, some of the informants told us that under certain conditions a more control-oriented management is necessary. Such conditions could be present with inexperienced employees, in which fast changes were needed. Informants also told us that the interpretation of control could vary, and that trust-based leadership always involves control. Some managers also said that individual support for teleworkers, which had been very popular and common during the pandemic, could also be interpreted as some type of control. Even so, we do not find significant disagreements on what should be a good and effective virtual style of management. But there were differences because organizations had various levels of experience with virtual management, and we also see there are different opinions about the balance between digital and face-to face activities. All the informants experienced an increase in the proportion of digital activities during the pandemic, and some were almost fully digital. All informants had learned quite a bit, and some of them will continue with relatively more digital activities in “the new normal” post-COVID period. The differences we see in the attitudes on the potential for digitalization need to be further addressed. Are these differences due to the culture of the organization, the types of activities and jobs they have, their competitive situation or the attitudes of the manager and the employees?

Demographics and Operating Variables

In the original model on the nested approach, developed by Shapiro and Bonoma (1984), they had demographics and operating variables for what they called the “outer nest”, where they had some quantitative and easily observable indicators, such as the type of industries, the size of organizations and the locations of the organizations. Our study does not have a large sample, even though some of our experts have experiences from many organizations, often including large organizations. The question of a contextual or situational perspective on virtual management is therefore probably most relevant for large organizations, those which have multiple locations, or which have a diversity of jobs and people with different potential for telework. But the pandemic also shows that organizations which had limited experience and previous knowledge had to think about this question. Nonetheless, we had some indications through our interviews that organizations in private service industries, such as banks, insurance companies and ICT had a higher potential for telework, and therefore thought that flexibility was a more central part of their future normal compared to, for example, the answers from public organizations related to health and social services. This is also in accordance with recent studies by for example Ingelsrud et. al. (2022).

Some Concluding Remarks

Our informants, particularly the experts, have supported our assumption that a contextual or situational perspective on virtual management has been more relevant during the COVID-19 pandemic than ever before. We saw examples of how the individual characteristics of employees, such as how competence and total life situation exerted an influence on virtual management. This is different from previous studies on situational leadership, which focus on skills and motivation. We also see that situational factors, such as previous experience, influenced the perception of the complexities of virtual management. And we even had some indications from our experts that virtual management will differ in different industries.

What Kind of Competence Development and HR Support do Virtual Managers Need?

Most studies on competence of virtual managers have been provided by consultants, such as McKinsey, Deloitte and Ernst & Young, and have consisted of topics such as: what are the special characteristics of virtual management, communication issues, how to empower the remote workers, technological issues such as how to use different communication media and how to run a digital meeting. Other topics are how to not only support the individual worker, but also to maintain organizational culture and affiliation in a period where employees are geographically distributed. It is important to notice that three of our experts worked in large public organizations with an extensive use of telework for a long period of time, though none of them had experienced a formal internal programme for virtual management. Nonetheless, our two consultants had extensive experience with different types of competence development for virtual managers.

All the experts said that competence in digital services was important for virtual managers, as digital meetings had been such an important and integral part of manager’s jobs during the pandemic. Some of our informants said that having basic skills on how to use and combine communication media, including digital meetings, was important. Our most experienced informants also emphasized learning about management of the digital meetings beyond the technical aspects, such as virtual process management,

how to maintain team spirit virtually, virtual collaboration, how to communicate digitally and having a digital mindset. In order to change processes and structures, managers must also learn to balance between human aspects and technology. Most experts said that traditional leadership competencies were the most important things, but that there should also be a focus on the special requirements related to virtual management, i.e. the importance of clear communication, both analogue and digital, to develop independence and autonomy for remote employees, and to develop an affiliation and common culture based on some common values. Lastly, all the informants emphasized the need for structure, together with flexibility.

When we followed up after the description of status about the future need for competence development in virtual management, we received mixed answers. Some had no clear ideas, while others said that virtual management was almost the same as traditional management, and therefore no special attention was needed. A small group argued that there should have been a special focus on virtual management as part of traditional leadership education to address the special requirements, and to increase the effectiveness of, e.g., digital meetings. These people thought that they thus far had not applied digital services to develop the organizations like in a digital transformation, but only replace manual processes with digital ones without changing processes and organisations. They also thought that the challenges in virtual management related to communication and handling complicated HR tasks needed to be addressed, supported and coached by experienced advisors.

Support from HR

Contreras et al. (2020) have made one of the few scientific studies on the role of HR during the pandemic. These articles focused on the need for HR to support managers in how to develop digital onboarding, and how to support managers to handle new employee expectations for work locations. HR should also have a role in training, for example related to digital skills. HR can also be used to develop new communication protocols and procedures, be responsible for activities related to culture and cooperation and also take initiatives to discussions about the “new hybrid working normal”. Our focus was on HR support for competence development for managers. It was interesting that the practitioners had limited formal education in virtual management, even if they had practiced for several years. The experts argued mostly for virtual management to be included in ordinary education for leadership development. But everybody admitted that technology and digitalisation did not have such a central position as is required after the pandemic. And there are also questions to be solved about the division of responsibilities between the IT-department and the HR-department.

CONCLUSIONS

The overall research question is: “What is new in virtual management during the pandemic, and is there a need for a situational perspective? Through this chapter, we wanted to contribute with knowledge on how virtual management during the pandemic is different from virtual management before, the need for a situational approach to virtual management and what competence-development virtual managers need? Before the pandemic, previous research on management at a distance, here called virtual management, has been characterized by a “best practice approach”, in which there is little differentiation dependent on context. COVID-19 has also meant that employees with insufficient competence, and who are in

unsuitable jobs, must work remotely. A more context- or situation-oriented perspective on distance management is therefore needed, in which factors such as employees' competence, type of job and extent of home office, as well as employees' overall life-situation, should be considered. We have identified relevant context factors, and how leaders with employees at a distance should adopt to these context factors. Another research question is what kind of competence-developments leaders need post-COVID. The results show that the concept of situational virtual management is hardly used in practice, but there is awareness that there has been more of a focus on digital skills for virtual managers, in addition to more of a focus on the need for individual support for teleworkers. We also applied a "nested model" for virtual management, where other criteria for the adjustment of virtual management can be applied, from more demographic characteristics of the organization to characteristics of the leader. Our results show that due to more employees at remote locations, managers need more competence on digitalization, e.g., related to digital meeting, digital process management, and more trust-based, relationship-oriented and individualized management.

The Limitations of our Study, and the Need for More Knowledge

There is a need for more research on the context of virtual management, theoretical studies on the media choice of virtual managers and the need for competence development. Athanasiadou and Theriou (2021) say that one of the topics for future research should be the relationship between leadership style and employee outcomes in a teleworking context. More research is necessary on the role of the leader and the effects of different leadership styles, with an emphasis on leadership as an enabler or a constraint, and on the leader's support towards and control over teleworkers. As described in the "nested approach", we need studies to go deeper into the individual factors. One example is to find out more about the individual support of virtual managers. We also need broader and quantitative studies to be able to describe "the outer nests". For example, how are the characteristics of virtual management different in one industry compared to another. Moreover, we need studies on learning from the pandemic, and which factors will influence "the new virtual management normal" when telework again is voluntary. We also need to find out how the new digital services fit into media choice theories (Daft & Lengel, 1986). Why is Zoom associated with fatigue, when according to media richness theory, such a service should be almost as rich as face-to-face communication? We should find out more on the perception of distance, and the balance between digital and face-to face activities for managers. Mintzberg (1980) wrote about the nature of managerial work 50 years ago. What is the nature of virtual managers' work in 2022? We need to know more, as face-to-face communication is not the dominant way of communication for managers anymore, even after the pandemic. The differences we see in the attitudes on the potential for digitalization need to be further addressed. Are these differences due to the culture of the organization, the types of activities and jobs they have, their competitive situation or the attitudes of the manager and the employees?

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KEY TERMS AND DEFINITIONS

Competence Development: Competence is defined as the abilities, skills and attitudes required to do your job. Competence development is related to the individual person: tasks and learning needs which support the goals of the organisation (Lai, 2021).

Context Factors: Variables or situations which may have an impact on the phenomenon under observation. Management could for example have to be adjusted to context factors such as the size and type of organizations, or the characteristics of the employees.

COVID-19: Coronavirus disease (COVID-19) is an infectious disease caused by the SARS-CoV-2 virus; from: https://www.who.int/health-topics/coronavirus#tab=tab_1.

Digitalisation: The transformation from analog, manual systems to digital systems: to put “electricity on paper” in order to improve and make the organisation more effective (Kræmmengaard, 2019).

Distance: Physical distance in m or km (Erskine, 2007), or a geographic/physical distance that exists between different actors (Nilsson, 2019).

Telework: Same as remote work, which refers to “any form of work not conducted in the central office, including work at branch locations and differing business units” (Allen et al., 2015, p. 43-44).

Virtual Management: Same as management at a distance or remote leadership, management when there is a geographical distance between manager and remote employees (Bergum, 2009).

Chapter 10

Telework as an Element That Leverages Professional Performance and Family Balance

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ABSTRACT

The aim of this chapter is to investigate how employees view telework as a tool for improving professional performance and family balance. According to the findings, teleworking and family balance improve professional success. “Is telework an aspect that leverages professional success and family balance?” was the research question. It was feasible to test and verify the effects of perceived teleworking on professional performance and family balance through teams and organizations. This conceptual study covers fundamentals of teleworking, the benefits and drawbacks, as well as the impact on professional performance and family balance. The literature review entails a thorough examination of papers from major scientific databases (e.g., Scopus, WoS). Quantitative methods are applied in the field approach (2020-2021). A survey was created and distributed through social media platforms to collect data (e.g., Facebook, LinkedIn). The findings show a favourable association between the variables studied, as well as a good employee opinion of the impact of increased autonomy on telework performance.

INTRODUCTION

Recently the world has been shaken by a new reality that has set in. A worldwide pandemic, dubbed COVID-19. With it came profound changes to our way of working, in Portugal and in the world. Even the largest urban centres, known for the relocation they cause in the most distant lands, with a large part

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of the student and working population relocating for work reasons, found themselves in a reality that was close to the “ghost town” of any thriller. of science fiction.

In Portugal, the word “teleworking” was heard for the first time in decades, and in the mouths of the entire population, and all companies were forced to adapt quickly to this new and unknown reality. An unthinkable working model for many Portuguese entrepreneurs who saw this alternative to a complete stop as something unproductive and a disguised way of saying that workers were resting at the employer’s expense.

However, this stigma changed, people adapted, proved their worth, and Portugal witnessed an important leap forward in the ideal of work (a reality for more than a decade in so many other countries): the idea that worker can be far from the company’s physical headquarters and be as productive or more productive than if he were physically there.

Of course, other issues arise, such as the right to rest and the separation between home and work, but what was intend to address in this work is the reality that several companies are restructuring their 5/10-year business plans based on this new characteristic of workforce and with that, the recruitments themselves are different. A company based in Lisbon, such as our case in study, can now consider recruiting across borders, nationally and internationally, depending on the position they are looking to occupy in their staff and be aware that this person will do the job just as well or better. than someone present every day in the office under the watchful eye of the direct or indirect manager.

Teleworking as a Field of Study

The implementation of Telework in companies is a current issue, which could make a relevant contribution to the increase in productivity, efficiency and effectiveness of services, in some sectors of activity and professional careers and contribute to the valorisation and motivation of the respective human Resources. It also facilitates the reconciliation between the respective professional and personal life, also promoting a positive impact in terms of environmental sustainability.

As is known, following the declaration by the World Health Organization (WHO), on 30 January 2020, of the situation arising from Covid-19 as a public health emergency and, on 11 March 2020, as a pandemic internationally, a set of extraordinary measures were approved in Portugal to prevent the high risk of contagion of this disease, as well as to mitigate the socio-economic impacts arising from this epidemic.

The decree that carried out the implementation of the state of emergency, declared on March 18, 2020, focused, among other matters, on the exercise of professional functions from home, establishing as an exceptional and temporary measure to protect jobs, within the scope of the pandemic, the mandatory adoption of the telework regime, regardless of the employment relationship, whenever the functions in question allow. The telework regime thus expanded suddenly and significantly in all European Union countries, with it being estimated that more than a third of people with jobs started working remotely as a result of the pandemic. In other words, almost 40% of workers in the European Union reconfigured their professional activity for teleworking as a result of the epidemiological situation. Bearing in mind, however, the current evolution of the pandemic, teleworking is no longer mandatory in Portugal, for most situations, since the 1st of June, the question that arises is whether the adoption of this regime of provision of work is here to stay. Thus, and having the knowledge that the labour code will be changed in order to contemplate teleworking in the public administration, it seems pertinent to, study the perception

of employees about the positive impact on performance when working from home and also the impact on family balance, in the post-covid period and soon after.

Main Objectives

In this context, it's proposed a study that aimed to assess the acceptance and adherence to telework, simultaneously measuring the productivity level of employees in this work regime as well as their personal satisfaction and well-being. The final objective was to find a balance between both in order to be able to structure organizations in conformity (if it's the case). This plan to action became necessary to adjust, after the last two atypical years that were lived.

Organizations, such as the one under investigation, felt compelled to investigate the prospect of implementing teleworking on a more permanent and long-term basis, prompting the creation of this study. The purpose was to collect and analyse data in the most efficient way possible to aid in various judgments. These considerations include, among other things, training and monitoring current teams in order to best adapt to this new way of working, recruiting preparation, and HR briefing.

Even before the more focused study, it was also required to evaluate the external environment in order to propose the best solutions.

Research Question: *"Is Telework an element that leverages professional performance and family balance?"*

THEORY

Leadership

Leadership is essential in the development and success of teams. Organizations are progressively betting on leadership that translates into good results. For this, it is necessary to achieve increasingly ambitious goals, in a market of strong competition, which can be greatly facilitated with effective leadership (Miguel et al., 2014). Along with motivation and communication, the concept of leadership is a fundamental part of the management process in the work and operational management of organizations.

"Transformational leadership," as defined by Burns (1978), is "leading by leaders who initiate changes in society and organizations, leaving permanent scars."

The primary motivation for transformational leadership is inspiring, and it is based on a compelling vision of the future. Transformational leaders generate admiration and trust by demonstrating a moral attitude and self-sacrifice. Transformative leadership is defined by values such as honesty, accountability, reciprocity, and honour (Farinha, 2021). On the other side, transactional leadership "motivates followers by their own self-interest." (1998) Is it as effective as the other? Rego (1998) takes into account the following: In the job, both types can be effective, but in different situations. Others would be more suited to periods of steady evolution and non-turbulent environments, whereas transformational ones would be better suited to foundational and change periods (Farinha, 2019). These two types of leadership are distinct processes that are not mutually exclusive, thus a single leader can exercise both types of authority at different times and in different situations. The transactional leader bets on management for consistency, focusing on rules and their implementation, whereas the transformational leader bets on change management, changing "organizational culture rules based on their vision of a more reward-

ing future.” (Rego, 1998). Similarly, transactional leaders are expected to keep the team on schedule, so they are motivated by a performance-based incentive scheme. On the other side, transformational leaders emit a more inspiring, self-motivating aura (Farinha, 2021). A variety of theories have been developed over the last few years. Here are some of the settings stated by some authors about Leadership concept. House (1999) stated that Leadership is an individual’s ability to motivate and enable others to contribute to the effectiveness and success of the organizations of which they are members. According to Rego e Cunha (2016) Leadership is a process of influence through which someone, individually or collectively, leads other people or entities to act towards common goals. Leadership has been studied at an individual level (behaviours and characteristics of the leader), at an interpersonal level (relationship between the leader and organizational members) and at the team level (relationship between the leader and the team) (Graça & Passos, 2012). Transformational leadership, for example, does not apply in this context because it focuses on greater developmental aims. Furthermore, they are not meant to provide immediate resources for employee well-being in times of stress. They also assume face-to-face interaction (Weiß & Süß, 2016) and are thus not totally transferable to the teleworking environment. Similar, telework-specific leadership styles like e-leadership (Avolio et al., 2014), virtual leadership (Malhotra et al., 2007), and paradoxical virtual leadership (Purvanova & Kenda, 2018) were designed for managing a small number of part-time and volunteer teleworkers or specialized remote work teams, but not for the widespread adoption of teleworking. As a result, they are not entirely applicable to the scenario during the start of the COVID-19 epidemic. Even if traditional practices are inapplicable to the well-being-related difficulties at the start of the COVID-19 epidemic, HRM and leadership are critical for supporting employee well-being, particularly in times of crisis (Günther et al., 2022).

Leadership in Organizations

Leadership these days translates into treating employees appropriately, providing them with support, demonstrating the right path and providing the incentive to be the best (Blanchard, 2012). It is the leader’s responsibility to build and maintain a climate that makes their subordinates actively participate in everything that is proposed and that they oppose each other so that the objectives are achieved. The fundamental elements for this relationship to happen are mutual knowledge, respect and trust (Vieira, 2002). There are characteristics in leaders that differentiate them from their subordinates, for example: the will to lead and influence, ambition, honesty and integrity, energy, self-confidence, intelligence and relevant domain of knowledge in the area that is theirs. burden (Robbins, 2006). It is up to the leader to have behaviours that are respected by his followers, only in this way will success at work be achieved. For this to happen, a leader’s leadership must be: emotional, as he has to be able to control his emotions and manage the emotions of those around him; competent and exemplary, that is, to be a reference for your team; a leadership based on the delegation of tasks and decentralization, the leader must make the team and each member individually responsible, giving assistance, support and supervising the work; fair and honest, in the sense of proceeding according to its principles and values, always impartial, and fair in its assessments; mobilizing and motivating, encouraging teamwork, promoting team unity, and as a consequence improving performance, both as a team and individually; active and assertive, the leader must be present in his actions, he must always be highlighted, adopting an assertive behaviour (Gravid, 2015).

With the increase in the use of teams in organizations, research began to pay particular attention to leadership role in promoting the success of the teams. The authors DeRue, Barnes and Morgeson (2010)

sought to summarize the literature and advance in research and theory, focusing on leadership processes within a team and describing how team leadership can arise from four distinct sources inside and Out of a team, in a formal and informal way contemplating each of them an external aspect and an internal aspect. The authors describe leadership functions that help teams meet their critical needs and regulate their behaviour in the service of the objectives (Farinha, 2019)

Human Resources

Human Resource Management consists, at the same time, of a set of skills and an activity, each one being structured in close interdependence. In this way, talking about Human Resource Management (HRM) implies the involvement and integration of people in an organization. That is, the performance of an organization depends on the contribution of the people who compose it, the way they are organized and the investment that is made in terms of their development (Sousa et al., 2006). Human Resource Management has undergone several changes over time, and obviously organizations have felt the need to keep up with these changes, more and more those responsible for human resources management are studying strategies that best fit their realities, enhancing and increasing the probability of achieving organizational success (Child, 2005). HRM is, therefore, today considered a strategic area of companies, since this same concept points to all actions developed by the human resources function with the purpose of achieving certain objectives (Sousa et al., 2006).

THE HISTORICAL EVOLUTION OF HUMAN RESOURCES FROM THE TURN OF THE TWENTIETH CENTURY TO THE TURN OF THE TWENTY-FIRST CENTURY

The beginning of the 20th century marks a strong change in the development of the personnel function that went through a period of restructuring with the presence of Taylor's principles, with the theory of Scientific Management Principles, which can be read as a pattern in the theory and practice of work design that favours short and repetitive work cycles, detailed and prescribed work sequences, and the separation between conception and execution (Adler, 1999) (Cunha et al., 2003). Taylorism promoted a division of labour that required workers to have specialized understanding of the job they were to execute, resulting in increased specialization and organization of work, as well as improved management of those who performed it (Cunha et al, 2012). Taylorism was born out of the necessity to professionalize and develop superior knowledge about work and production. (Cunha et al, 2012). In the 1980s, the concept of Human Resource Management emerged, which presupposes a change in mentalities, where people are considered as resources. This was due to the transformations that took place at an external level, such as the increase in competitiveness, the increased concern with the role of people within organizations, the search for enrichment and strategies to increase productivity within the different business areas (Silva, 2016). People are no longer the traditional challenge to become the competitive advantage of organizations that know how to deal with them (Chiavenato, 2009).

People Management

In today's global environment, more and more businesses are realizing the value of their human resources. Many experts believe that human resources are the most important source of competitive advantage for

businesses. In today's increasingly competitive climate, it is critical for an organization's existence to attract, develop, and retain qualified personnel who will enable the business to meet its goals. One of a manager's most difficult responsibilities is to manage people within the organization in order to achieve the organization's goals. To attain these goals, the organization's elements must be planned, recruited, trained, promoted, and compensated (Manção, 2017). In short, human resource internal management is a powerful strategic tool for organizational change and adaptability, adding significant value to enterprises through people valorisation and knowledge generation in support of development and competitiveness.

People Management Processes

The human resources area has repercussions on people and organizations. According to Chiavenato (2009) people management processes, the way to lead, guide and integrate them, make them work, develop, reward and monitor, in a clearer way how they are managed in the organization is fundamental in the organizational competitiveness. The present author identified six basic processes in people management, Add; To apply; To award; To develop; Keep and monitor (Chiavenato, 2014). The interrelation of these processes is present in the people management process since they enter the organization. They need to be seen as a whole and not individually, they all have the same importance, because being interrelated, any change that happens in one of them will affect the others (Chiavenato, 2014).

TELEWORKING

Origin and Concept of Telework

The creation of new kinds of service supply was possible by the ongoing growth of information and communication technology, as well as the globalization of the economy. Its precursor is "remote or remote work," which was proposed in 1857 by J. Edgar Thompson in the United States. Around 1960, "homework" returns in European society, initially focusing on the apparel, textile, and footwear industries, but eventually expanding to the beverage, cosmetics, and electronics assembly industries.

The term "teleworking" was coined in 1973 by Jack Nilles, an American trained as a physicist who is considered as "the father of teleworking." The scientist investigated the prospect of "bringing work to the worker instead of the worker to the work" during the 1970s oil crisis, when there was a need to cut fuel usage in travel as well as the resulting traffic difficulties (Nilles, 1976). In the latter case, information technologies may be able to take the place of commuting (home-work-home). Although teleworking has been used and studied since the 1970s, its origins may be traced back to 1857 in the United States, when the "Penn Railroad Corporation" began to utilize its private telegraph system to supervise employees who worked outside the company. The term "teleworking" has spawned a slew of definitions. However, there are two parts that must be present for teleworking to exist: "the geographical or topographical aspect (work performed at a distance) and the technological or instrumental element (resources for information and communication technology)" (Amado, 2018). "All work carried out from a given place or away from offices or central locations, where the worker does not have personal touch with his colleagues but can connect with them using new technology," according to the International Labour Organization (ILO) (Gbezo, 1995). "Telework is regarded to be work conducted with legal subordination, frequently outside the company and through the use of information and communication

technology,” according to article 165.o of the Portuguese Labour Code. Menezes Leitão (2008) defines telework as “the provision of work that takes place outside the employer’s core workplace, being carried out in another place that is linked to that central workplace by means of communication.” electronics” (Leitão, 2008). Telework is being pioneered in the fields of telecommunications, media and advertising, marketing, and accounting. Telework is now commonly referred to as a sort of flexible or distributed work. Aside from the overall shift in workplace culture toward a focus on efficiency and productivity, another driving force behind the current trend toward distributed work is the closely related process of economic globalization and the resulting desire for more flexible work arrangements (Pyöriä, 2011). In brief, teleworking allows employees to work from nearly anywhere thanks to technology improvements in communication devices/systems and widespread interconnection of people in this globalized age (Smith et al., 2015). As mentioned by Martino (2021) the use of electronic information and telecommunications capabilities to provide distant work is known as telework. Tavares (2020) mentioned that Teleworking involves focusing on the flexibility in work practices enabled by working at any location. Gunther (2022) stated that Teleworking – a mode of work in which employees use information technology (IT) to work remotely and independently of their company’s geographic location—can have a number of positive effects, including increased employee flexibility and autonomy, which can lead to higher job satisfaction and performance as well as reduced work-family conflict. Teleworking, on the other hand, has the potential to harm employees’ health by causing dissatisfaction, social isolation, and tension (Günther et al., 2022). Telework, according to Adamovic (2022), can assist certain individuals minimize job stress by providing them with more autonomy and flexibility, as well as reducing their commuting time. However, due to social isolation, Zoom fatigue, and the difficulty of establishing a work-life balance, telework can be detrimental to an employee’s well-being (Adamovic, 2022).

Modalities

According to ILO, International Labour Organization, (2021) there are four types of telework: home telework; mobile telecommuting; telecentres and cross-border teleworking.

First and foremost, home telework – the most commonly referenced modality – is discussed, which is carried out at the worker’s home with the appropriate equipment and technology in place to complete the tasks. It’s also vital to distinguish between full-time and part-time home teleworkers in this context, because in the latter situation, telework at home might be interspersed with time spent at the regular workplace.

Mobile teleworking (also known as nomadic or itinerant teleworking) can be done in any area - not previously specified or fixed - using various technologies as a resource, without any spatial constraints. In the case of telecentres, the employee travels to a corporate center (a dispersed location that is nonetheless linked to the firm’s main headquarters) where he has access to a full structure to carry out his task. Satellite offices and community work centres are two types of telecentres described in the philosophy. Employees from the same company share satellite offices (also known as satellite centres). Community work centres, on the other hand, bring teleworkers from various firms together. Finally, cross-border (“offshore”) teleworking allows companies to employ workers from other countries.

Advantages and Disadvantages

International Labour Organization also referred to some advantages and disadvantages on teleworking (International Labour Office, 2021). Since its inception, the concept of “teleworking” has been connected with benefits as well as drawbacks at the individual, company, and societal levels.

i) Time flexibility; reduced travel and, as a result, reduced expenses on transportation, food, and clothing; greater autonomy; increased productivity; stress reduction; greater balance between professional and personal life; better quality of life are among the benefits (associated with home telework, as it is most commonly referred to).

Teleworking, on the other hand, has drawbacks such as social isolation, a reduced ability to socialize, a reduction or even loss of professional possibilities, the difficulty of establishing a work environment, and the difficulty of separating professional and personal lives. Autonomy and responsibility, according to Farinha and Sousa (2015), are notions that belong to two dimensions that are intertwined and mediated through the communication concept. These are critical elements in a team’s success in facilitating change and development while operating as a unit (Farinha & Tomé, 2019). As mentioned by Adamovic (2022) Managers can lessen the likelihood of social isolation by scheduling regular online team meetings and catchups with staff. Teleworkers can also benefit from clear instructions, job descriptions, and guidelines from their managers. Working from home can give employees more job autonomy, but too much autonomy can be stressful if it raises the employee’s workload and makes the task too difficult and demanding (Langfred, 2007). As a result, it is critical that staff have clear goals and expectations (Adamovic et al., 2020).

ii) Employers benefit from telework because it lowers costs (space, maintenance, energy, and so on); increases productivity (the worker has more control over his working hours and may thus work when he feels most productive); reduces absenteeism; and makes it easier to comply with regulations (namely environmental legislation and legislation related to citizens with disabilities). On the other side, there is a greater difficulty in supervising work and a deterioration of team spirit; also, despite the previously indicated cost savings in terms of maintenance, etc., an investment in equipment is required to ensure productivity.

iii) There is a reduction in air pollution; a reduction in road traffic and road accidents; the inclusion of citizens with special needs, such as citizens with disabilities and caring citizens; and a reduction in the risk of infectious respiratory disease contagion; a reduction in public transportation costs; and a slowing of global warming. It does, however, imply a deterioration of professional cohesion.

According to Tavares (2020) Teleworking has become increasingly popular in the present employment market as a result of its technological and geographic advantages in allowing people to work from a variety of locations. As a result, more businesses are turning to teleworking for its cost savings and flexibility (Tavares et al., 2020). Due to the increased flexibility of work responsibilities and the option to work in a familiar and comfortable setting, people who work from home are more productive and have fewer work-life conflicts (Palumbo, 2020). According to Rodríguez-Modroño (2021) the more job autonomy teleworkers have, the more effort they put into their work, according to social exchange theory. Employers benefit from a more productive workforce that consumes less space and is more cost-effective, while employees benefit from the potential of a better work–life balance, resulting in increased job satisfaction and organizational loyalty (Rodríguez-Modroño & López-Igual, 2021).

Case

The company under investigation (for this study) decided to pursue the investigation further in order to make judgments about strategic and operational procedures and processes. As a result, a survey was conducted to examine the working population of Lisbon and the Tagus Valley Region, where this company's main operations are located.

This metric is thought to be linked not only because of the companies' personal experiences, but also because anyone who spends more than an hour commuting per day will be able to join telework and consider themselves more productive working this way, achieving a better balance between personal and professional life.

METHODS

Design/Methodology/Approach

This conceptual paper, explores the concepts of teleworking regarding increase of professional performance and family balance and how it can contribute to organizational success. The aim of this paper is to explore the perception of employees about teleworking and how this change on procedures could lead to better professional performance and family balance. To do so, we'll look at the link between the two variables under consideration, Telework and family balance. Documentary analysis was employed, with papers drawn from the main scientific databases: Scopus and WOS, with the keywords Leadership, Human Resources, Management, Teleworking, Covid-19 as search terms. A quantitative methodology was used. The study was conducted from September 2020 to June 2021 using some customized questionnaires adapted from the literature review.

Define meaningful questions that allow for the identification of as many differences as feasible between work practices. As a pre-test, some Ad hoc questions were reviewed and evaluated to see whether they were well understood and if the replies could distinguish between them. A survey (questionary) was compiled, which was distributed to people who work mainly in Lisboa and Tagus Valley, regardless of the hierarchy and departments or sectors (managers, non-managers, operational professionals per department, among other examples).

The Background of the Study and the Methods Used to Obtain Data

This research was conducted in the various sectors. Due the circumstances, there is an interest in examining how employees perceive the hypotheses of doing tele-work and how they perceive the add value for the professional performance and family balance. As the intent of the study is to collect the major number of responses to analyse different perspectives (from leaders to followers, from different departments as well a Qualitative approach was taken in consideration. Qualitative analysis promotes an interpretive approach and allows for a deeper understanding of the situation. (Sousa & Costa, 2014) The study employed quantitative research methods.

Sampling Method and Sample Calculation

Hoping that studying the proportion of the observed population does not change the characteristic of the population under research, as a result, sampling was used to discover a population characteristic as it is. (Thompson, 2012).

A good sample will reproduce the population's characteristic of interest as closely as feasible to what it is. It will be representative in the sense that each sample unit will reflect a known number of individuals in the population (Lohr, 1999).

There are numerous sampling methods employed in the study of finite populations, in which the current work is structured, and these are used according to the characteristics of the same population. The sample size was calculated statistically based on the size of a finite population of around 740,000 potential workers, as follows:

$$n = Z_{\alpha}^2 \frac{N \cdot p \cdot q}{i^2 (N - 1) + Z_{\alpha}^2 \cdot p \cdot q}$$

where n is the expected sample size from a population of size N, Z is the value corresponding to the Gaussian distribution, p is the expected prevalence of the parameter to be evaluated, q is given by 1-p, and I is the expected error. With a confidence level of 90% and a margin of error of 5%, a representative sample size of 271 is projected, with 316 responses obtained using a questionnaire survey, which was made available by email and social media. Because all responses were required, the database does not display missing values.

Sample Error

Santos (2017) defines sampling error as the difference between the survey's estimated value and the true value. It must be entered the maximum sampling error allowed by the study in the calculator. In most cases, the researcher determines this value. Typically, the configured value is 5%.

Trust Level

The likelihood that the actual sampling error is smaller than the sampling error admitted by the survey is known as the confidence level. If you set a sample error of 5%, the confidence level reflects the likelihood that the survey's error will not be greater than 5%. The confidence level is the probability that the poll predicts somewhere between 5% and 15% (Santos, 2017).

Population

The number of items in the research universe is referred to as the population. The population is the number of elements segmented to be study. If the researcher is unsure of the precise number of elements in the universe, he should be cautious and use a number that is large enough to keep the effective population from growing (Santos, 2017).

Characterization of the Sample

Gender (male or female), nationality, hierarchy position, department, location, and other demographic data were used to define the sample. To see if there were any changes in perception based on the criterion for the traits to be researched (Gender, department, occupied position...) Despite the fact that estimates suggested that 271 people would be the “ideal” sample size, this study received 316 legitimate responses.

The findings revealed that the majority of respondents are females between the ages of 36 and 35, residing in the vicinity of Lisbon but within the Lisbon and Tagus Valley area (Portugal), and working in the Logistic and Operational divisions.

Relationship between Variables and Categories

It can be explained the reality under study and generalize the results using the causal explanation of the variables observed, as well as their categories. The compatibility of functions with telework divides the sample between those whose functions are compatible with remote work and those whose functions are not.

The sort of association between productivity and teleworking, as well as its evolution, should be discernible among the 316 participants in the study. The company’s teleworking receptivity is investigated from the standpoint of gaining an understanding of how this work regime was seen by higher entities by using a contingency matrix (receptive / relies on the team / non-receptive) to estimate co-occurrences.

The collision between personal and professional life, namely between female and male sex, as well as across age groups, allows for contemporary reality divergence between the various categories, as measured by their marginal counts.

Data Collection Tool

The selected study method aims at primary data collection since the starting point for obtaining data was an anonymous questionnaire carried out in the form of a google form (Questionnaire - electronic - via online platform) whose link was shared by email. and through social networks. Through the link, individuals accessed the google platform with our questionnaire, being able to respond only once. All questions are mandatory so that all questionnaires could be completed and valid for the analysis of the information.

The questions in the questionnaire are of the closed type and multiple choice, and it is only possible to give 1 answer. Restricting the answers is a way to obtain more concrete and reliable data. With the exception of one question, which is presented as a checkbox that allows the user to select more than one option so that it can count as the number of people who chose each of the options in the answer.

Questionnaire

Table 1.

Question #	Content	Goal
1	Is your professional activity compatible with teleworking?	To determine who actually performs duties that are consistent with teleworking
2	Age range	Framing of age groups that are consistent and relevant
3	Gender	Gender Predominance in the Answers to Perceive
4	Location	To determine the relationship between the distance between home and work and the preference for remote work.
5	Is the company where you work receptive to the practice of teleworking?	To gain a better understanding of how people feel about the companies in which they work in connection to the theme.
6	What is your hierarchical level in the company where you work?	Understand patterns by looking at the organization's hierarchical structure.
7	Which department do you belong to?	To determine the sectors' dominance
8	How many days a week do you think telework is viable?	To determine how many days employees believe they will be able to work remotely in order to preserve a professional balance while reacting to the demands of the role
9	Do you have the necessary equipment/ space/facilities at home to practice Telework?	To find out what kind of equipment customers currently have at home in order to save money for the company.
10	Do you think you achieve a better work/ life balance when teleworking?	To determine employee satisfaction with the telework regime in particular by obtaining an individual perspective of the impact that the telework regime may have on the balance between personal and professional life. Important information for the study's conclusions.
11	Do you feel that your productivity increases or decreases when teleworking?	To assess individual views of productivity in telework after removing a bigger number of potential distractions, as well as permitting an optimization of work and personal life organization, as well as personalizing the physical work environment.

Font: Autor

Discussion

As previously stated, the goal of this study was to measure employee acceptability and adherence to telework while also measuring their productivity, personal satisfaction, and well-being in this work environment.

It was found that the following variables would need to be examined for this purpose:

- Worker is responsive to the practice of teleworking
- Professional practice is compatible with the practice of teleworking
- Productivity increases or declines when teleworking
- Gender / Age range
- Is the employee receptive to the practice of teleworking?
- A sense of equilibrium in one's life. (Personal and professional)
- In which department do you work?

- Departmental relationship and work-life balance

Results Analysis

More than half of the respondents (61.1%) are female, and the most common age groups are those between the ages of 26 and 35 (39.8%) and 36 and 45 (36.9%). (37.0 percent). 72.4 percent of those surveyed work in jobs that are compatible with teleworking, and 53.3 percent of those surveyed live in the Lisbon and Tagus Valley Area, compared to 29.8 percent who live outside the region and 16.9 percent who live in Lisbon. Around 58.9% of people are classified as employees or operational, followed by 26.3 percent of those in middle management roles (Team Leaders or supervision). Higher hierarchical levels account for only 14.8 percent of the total. Logistics and Operations (30.4 percent) account for little under a third of the departments studied, while the others (Human Resources, Accounting and Finance, Customer Service, Commercial and Marketing, Purchasing and Product, and Systems) have comparable percentage distributions.

Due to the significance of the percentage values obtained, the preference and pertinence of teleworking was obvious in any of the sectors.

In order to determine the workers' perceptions of the company, 44.2 percent believe there is receptivity to the practice of teleworking, while the remainder are divided between those who disagree (18.8%) and those who assign a dependency based on the work team (37.0 percent). It was possible to deduce from the study that, in a teleworking environment, opinions on the number of days spent working remotely are relatively evenly divided for 3, 4, and 5 days, accounting for slightly over half of the responses. These findings are to be expected, given that the vast majority of study participants had the requisite teleworking equipment, such as broadband Internet (89.7%), computer (92.8%), and telephone (92.8%). (80.9 percent). Furthermore, with 82.1 percent of affirmative responses, it was established that this work regime has a positive impact in terms of a better balance between work and personal life, with women aged 26 to 35 years being the most receptive. This may be due to the circumstances in which they reside, such as the ease with which they can better watch their children and/or maintain their family dwellings.

The final goal was to strike a compromise between the two (balance between work and personal life) in order to create the company's new expansion strategy. After the two abnormal years, this strategy became vital to adjust.

Before purchasing new property and constructing new offices or commercial areas, the company decided to re-evaluate its development plans, and it was asked to collect and analyse data in the most efficient manner possible to aid in decision-making.

These considerations include the creation of new physical spaces, the training and monitoring of present teams to ensure that they adjust to this new way of working as quickly as possible, as well as recruiting preparation and HR briefing. As a result, this report is a mock-up of the project file that would be presented to the company's steering committee as part of a proposal for a new work system.

Pre-Conclusions

Without a doubt, the study's main conclusion is that the majority of respondents, both inside and outside the group's companies, believe that hybrid or remote systems can help them achieve a better work-life balance, and that this satisfaction makes them loyal and dedicated to the company that employs them.

Operational Recommendations

Some recommendations are made in light of the aforementioned circumstances and based on the acquired data:

1. Reduce investments in physical locations for the formation of offices, enabling staff more self-management and trusting their ability to work on project-by-project goals – alter KPIs and SLAs
2. Reorganize current office space physically.

By visiting the site, it is clear that there is room for more comfortably and sustaining team chemistry where they are currently 80 people. The office now has a significant amount of wasted space, and the changes authors recommend are straightforward and can be implemented immediately.

Below-Ground Walls

For instance, the workplace currently features non-structural walls separating each department. From the time authors were there to analyse the location, authors saw that the relationship between teams, which is critical for the company's growth, is not very productive, particularly between certain divisions. As a result, it's offered a larger area, not entirely open but closer, with ecologically friendly divisions that not only bring the teams closer together but also make the space healthier for them to live in.

Meeting Rooms

The workplace currently has 7 meeting rooms that are routinely utilized for everyday multi-departmental work, thus the idea presented includes areas that allow for collaboration among colleagues and eliminate the need for meeting rooms. The office will share a reservation schedule for the available rooms, and the area from which they will be taken is currently being used to accommodate a larger number of team members.

Leisure Area / Break Room

It also features a recreation room that the authors have never seen occupied because the teams reside in the break room of the building with the greatest amenities, on the floor below, which it's regard as beneficial to coexistence and information sharing between the group's many brands. Even though there is a dining room on the ground floor that can accommodate everyone in the building even if they are at the same time window, it is recommend staggered meal times. By repurposing these spaces, the present workplace, which seats 80 people and was previously considered tiny, now has the capacity to accommodate the development of up to 180 employees while maintaining the teams' everyday well-being.

3. Cross-border recruitment using a hybrid or remote strategy. Adapting the old team to the new rotating schedule.

Telework as an Element That Leverages Professional Performance and Family Balance

From the time spent observing your teams in the central office, it was clear that there are some teams that benefit from being closer and sharing office days, and others that are more independent and do not have to follow this guideline.

Thus, teams such as Marketing/E-Commerce/Purchasing/Design and Commercials must spend two days together in the same location, but the remainder of the team can work from home or on the ground in the case of Commercials who must prospect for consumers “on the street.” as well as sales tracking.

For example, in IT, there are six individuals who don’t all have to be at the office on the same two days; instead, they can rotate among themselves to ensure that someone is always on site to resolve any issues that emerge on site or with the servers.

Planning and growth is a department that spends more time in the field than in the office, so it does not require a dedicated job; instead, it can be shared among the five aspects.

The board has exclusive use of one of the meeting rooms and does not require secretaries outside of that room because they can reserve one of the common rooms on the floor for meetings outside of the board. The data management team, like the human resources team, does not need to be on site every day; it is sufficient for them to cycle among the elements with one remaining in the office.

Logistics spends a lot of time on the ground supporting external warehouses, partners, and stores, so they don’t need to spend as much time in the offices, especially because they have their own locations in the main warehouses. A tool for team rotation, for example, might be provided to simulate schedules with the human resources department.

It is also suggested that Friday be designated as a general home office day, so that all teams can hold weekly KPI and SLA meetings to fine-tune a topic, close weekly targets, and clean and sanitize the workplace. It should also be on this day that the challenges for the following week are released, so that Monday is more profitable at the start of the week by not being spent to plan the other days in the morning. Authors believe that this method benefits teams by allowing them to begin their weekend of rest without wasting time traveling to their homes, which was identified as an important factor in their overall satisfaction in a study conducted, and that it is possible to make the most of your time at the start of the week.

4. Invest in existing and prospective employees’ training to provide them with the necessary tools and mentality for the company’s long-term success.

We have two training plans for you to choose from. The first is an in-person presentation to current human resources teams and middle managers, with the goal of spreading the desired feeling and function to current personnel.

Department heads will receive full support throughout this session so that they may design or adapt their KPIs to fit this new work reality, as well as understand how to map and assess them in the most effective way possible from a team viewpoint, with freedom and responsibility.

Teams that work toward a common goal and are judged on results rather than hours done. It may appear to be a significant shift in the present paradigm, but it has significant implications for team motivation, dedication, and profitability.

Productivity indicators and effectiveness indicators centred on two points: efficiency and effectiveness, for example, will be two of the major KPIs to be examined.

The training files will have all of this information, but here’s a quick rundown of what these signs are:

Productivity indicators are metric instruments that are used to assess the performance of a group of people or an entire firm. They evaluate the outcomes in terms of the relationship between the output and the resources spent on it.

One-on-one meetings, weekly reports, and objective and quantitative metrics reviews are all options for measurement.

By combining effectiveness and efficiency, effectiveness indicators can be calculated.

The relationship between the stated aims and the results obtained, that is, attaining what is expected, is referred to as efficacy.

The link between the results obtained and the resources utilized to obtain them is known as efficiency. The goal of accomplishing the best in the best way, or attaining the best results with the best resources, is used to measure it.

Operational Needs

To support this new way of working, authors believe that all employees at the brand's headquarters should be given tools that allow them to accomplish their jobs well both within and outside the company's premises.

In light of this, and in consideration of existing equipment, authors estimate that the following investment is required from an operating standpoint:

- mobile
- peripherals (mice/keyboards/monitors) for assembly at employees' homes or in the central office to support work
- mobile phones and associated cards with operator contracts
- licenses for offices - VPN licenses
- SAP licenses as needed in teams implementing the application - remote and continual training programs, as well as immediate face-to-face and integration plans.

It is believed that, in terms of information security and confidentiality, a massive investment in this equipment, rather than, as previously questioned, waiting for equipment for employees to use at the service of the coffers, makes sense in order to prevent information breaches abroad, to be able to monitor the work of the teams if necessary, to allow better IT and systems support, and to ensure that the equipment is capable of and work to be carried out.

Systems, Accessibility, Cybersecurity and IT

To ensure that all of our employees have access to sensitive information from anywhere in the world, one must ensure that our organization has servers, platforms, and Cloud systems capable of handling both the amount of data and the number of people accessing the same data at the same time.

This criterion is missing not only good and professional IT security to safeguard all information from prospective hackers, but also a great IT staff to monitor all of these processes in real time to ensure not only their functionality, but also prompt response to any problems that may develop.

Ensure Technical and Comfort Conditions for Remote Employees

One of the findings of our study is that the majority of respondents claim to be able to do their functions remotely if they have access to the internet, a phone, and a computer. However, according to the duties that these individuals will undertake in the organization, the allocation of a laptop and (in some situations) a mobile phone will already be specified for the majority of these employees.

Nonetheless, authors believe it is critical to invest in a credit line, a subsidy, or a cost allowance so that employees can purchase equipment or supplies that will allow them to work more comfortably from home. Appropriate office chairs, for example, to maintain proper posture; adequate lighting, or the ability to acquire a faster and more suitable internet connection.

Resetting KPIs (if applicable)

It will eventually need to establish new KPIs that allow them to evaluate work done remotely in order to ensure efficiency and the achievement of the primary business objectives.

Disclosure of Company Culture

Better methods of distributing the company's beliefs, principles, and mission should be established to avoid the eventual removal or isolation of personnel. For instance, more dynamic, detailed, and appealing newsletters; activities that encourage or discourage face-to-face contacts among the company's diverse personnel; on-the-job training; one-on-one autonomy; and regular feedback and coaching sessions.

In short, the cost-benefit analysis of implementing a hybrid or totally remote work environment is obviously viable, profitable, and beneficial not just for businesses but also for their employees, as seen by the results (profit) when compared to the old model.

Market Advantages

Overall staff productivity/satisfaction ratio

Human resources are increasingly valued inestimably by the majority of the world's leading enterprises. The Company cannot complete its production processes without people, regardless of the business area. As a result, many businesses are increasingly providing appealing incentives to their employees in order to improve their level of living. The premise that a satisfied employee is a more productive, stable, available, and devoted employee to your firm is directly tied to this investment and concern for human resources, as well as this provision of consistent professional stability. Another method to provide this consistency to our employees is to choose for complete remote or hybrid work schedules, which saves a lot of money on costs connected with having all personnel assigned to the company on the premises full time.

The Earth has the potential to become our primary supply of human resources. If the Company don't have a set address or a permanent presence of our employees in the offices, it will be possible, company may be able to recruit anywhere in the world, or in nations that are more strategically advantageous for our company. As a result, company will be able to select the top professionals and those who are most matched to the open positions.

CONCLUSION

With this study, it was possible to learn about employees' perceptions of the influence of teleworking in their life, as well as the impact that changes brought on by the Covid -19 issue had on businesses. It was possible to move from a stage of conjecture to one of true comprehension, and even to offer actions and solutions for implementation. Although there is always room for improvement, it was a terrific approach to teach us about the necessity of a well-planned and executed study, as well as the weight that data interpretation may have in the execution of decisions. In general, the study's progress with such a current topic as teleworking was positive.

The majority of respondents prefer the telework methods in general, citing increased professional income and family balance as reasons. Another intriguing point is that the responders that favour this work technique the most are from the operations and logistics department. Authors may reasonably presume that this is because they are employees with fewer flexible schedules, little freedom and management authority over their schedules and jobs that they consider self-managing.

The following are some of the recommendations made to the company as a result of this research:

- Reduced investment in physical locations for the development of offices, giving staff more self-management and trusting their ability to work according to project requirements -project-by-project goals
- Invest in existing and future employees' training in order to provide them with the necessary tools and mentality for the company's long-term success.

It is safe to conclude that this organizational change benefits the company as well as its existing and future employees. This will undoubtedly be mirrored throughout the group's activities, resulting in increased overall productivity and greater earnings by the end of the year. Teams that are happy produce more and better results. By removing the geographical constraint, it is possible to hire the best candidates and get better results.

The money saved by not investing in new infrastructure can be used to give the purchasing department more power and to expand the stores and daily operations in order to better service to the final customer and, as a result, retain and grow sales and gross margins.

LIMITATIONS AND FUTURE STUDIES

One of the difficulties the researchers encountered due to limitations and deadlines was not having questions that would have been relevant, such as savings in travel, associated costs, distance between home and work, and time spent, as soon as it started working with the data with the information taken from the Google Forms questionnaire. It would be feasible to better quantify the data while deriving less factual judgments in this manner.

The most significant stumbling block was the pandemic itself.

During the study, it became clear that, in order to defend one of the most important benefits of teleworking, the study should have been broadened to different areas, as one of the recommendations would be to remove geographic restrictions on recruitment.

A more complete analysis (covering the variables mentioned above, such as travel savings, associated costs, distance between home and work, time spent, and others) is recommended in order to acquire more detailed information. National regions outside of the Lisbon and Tagus valley area should be included in the future study. Because one of the intrinsic aspects of teleworking is the ability to attract personnel without regard to geography, taking the research nationwide or even across borders will aid in the preparation of unrestricted recruitment, focused on the required answer.

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Chapter 11

Where Are You Going, Work From Anywhere?

The Challenges of Remote Work Before and After the COVID-19 Pandemic

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ABSTRACT

The onset of the virtual revolution and global working trend known as working from anywhere (WFA) potentiated by the bio event COVID-19 shifted not only the way we work but also the focus of research on this topic. This chapter aims to portray in a systemic way the researchers conducted before and after the bio event in a systematic way in order to create a research map of topics by having as reference point the outbreak of the pandemic and by using VOS Viewer software to illustrate the resulting clusters of topics around this reference point topics before and after the pandemic hit. Results indicate a clear difference between the two periods regarding the WFA research. Firstly, the number of papers published on this topic has increased significantly, and secondly, the types of topics approached seem to have become more focused. Main topics of research are discussed as a way to reflect on the challenges for theory and practice that are to come.

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INTRODUCTION

The COVID-19 pandemic impacted the way we work in the most paradigm-shifting manner to the global workforce since the second World War (Ozimek, 2020). Most notably, the lockdowns brought about by the pandemic resulted in the adoption of remote work or work from anywhere (WFA) by a significant proportion of the working population (Ozimek, 2020; Henry, Le Roux & Parry, 2021).

Work done from different locations other than a traditional office space (e.g. home or co-working spaces) enabling workers to perform their tasks via information and communication technologies (Nilles, 1997; Perez Perez et al., 2003) has been defined as telework, telecommuting, virtual work, remote work, distance work, home-based teleworking, mobile telework, remote work or work from anywhere (Bailey and Kurland, 2002; Nilles, 1997). Although this practice has been given many names that have subtle differences among them, the overlap is sufficient for them to be considered synonyms (Henry, Le Roux & Parry, 2021).

This chapter aims at providing an overview of the scientific literature before and after the COVID19 pandemic, in order to unfold the sequence of this complex environment and shed light regarding trends and challenges for the years to come.

BACKGROUND

The construct henceforth referred as WFA (work from anywhere) has been considered as an alternative way of organizing work and also as an unconventional way of being free to choose where to live regardless of where your workplace is; that has attracted the attention of both academics and practitioners (Nakrošienė, Bučiūnienė & Goštautaitė, 2019; Choudhury, Foroughi & Larson, 2020).

The widespread implementation of WFA has undoubtedly been made feasible by the accentuated development of digital technologies (Sako, 2021). Computers have become more inexpensive as well as more powerful; stable broadband internet has become widely available in most locations and advances in collaboration-oriented technologies such as video chat and cloud-based services have facilitated remote partnerships in a variety of knowledge work including research and development, marketing and product development (Sako, 2021).

In 2015, 37% of US workers were working from home (Gallup, 2015), whereas in the European Union this number was significantly lower (17%) (Eurofound and the International Labour Office, 2017). Given that the internet infrastructure in the EU was duly developed, the slower adoption of telework had been associated with organizational factors, such as lower trust of managers and workers needing to meet other people face-to-face (Eurofound, 2017; Vilhelmsson and Thulin, 2016).

A number of multifaceted advantages and disadvantages and other implications of WFA for individuals, organizations and society have been previously studied (Perez Perez et al., 2003; Hill et al., 2010).

Advantages of WFA include benefits for the worker, for the organization and for the environment. Regarding worker associated benefits, there is the possibility of self-regulation in time planning (Morgan, 2004); greater autonomy (Harpaz, 2002); more family and leisure time (Johnson et al., 2007); decreased stress (Fonner and Roloff, 2010); increased job satisfaction (Gurstein, 2001); reduced commuting time (Tremblay and Thomsin, 2012) and reduced travel and other costs (Morgan, 2004). Organizations can benefit due to less informal communication (Khalifa & Davison, 2000); improved productivity (Fonner and Roloff, 2010); increased employment opportunities for women with children, students and disabled

persons (Morgan, 2004). Finally, this option seems to be more environmentally friendly because it reduces traffic congestion and air pollution (Handy & Mokhtarian, 1996).

Despite the commonly accepted notion that employees may be more productive when WFA because they can work during their most productive time and be less distracted by co-workers (Golden and Veiga, 2008), companies remain generally wary of not being able to control if, what and when the worker is actually working (Laker et al, 2020).

Thus, this productivity rise and WFA adoption seems to come with a side of ethically questionable surge in employee monitoring (Laker et al, 2020). If the managerial tracking of worker non-work related activities (e.g. emails and social media activities, meeting records, timesheets, who they met with and where) had long been something that people were aware of, now, the stakes are a lot higher and companies have even been known to buy so called spy software, dubbed “tattleware” (Laker et al, 2020). These apps can, for example, take webcam pictures of workers as regularly as every minute and upload them for seniors to scrutinize; take pictures as often as every five seconds, to provide screenshots, login times, and keystrokes to ensure workforces are productive (Laker et al, 2020). The use of this type of software can create an atmosphere of distrust between the employer and the employee, and generate added stress regarding the working relationship.

Other challenges of WFA concern psychosocial factors in workers. Information technologies diminish face-to-face communication with colleagues, an important source of social interaction and organizational culture awareness and socialization (Ammons and Markham, 2004; Madsen, 2003). What is more, face-to-face human interactions enable leaders to shape adaptive processes and allow new ideas to emerge through daily actions of engaged employees in experimentation of new ways of operating (Uhl-Bien & Arena, 2018). Therefore, the replacement of those interactions with WFA is a field to be examined whether it will allow rich human interconnectivity and adaptation to happen in highly complex contexts. Further, workers in WFA tend to feel weaker management support and be less visible (Cooper and Kurland, 2002) which leads to reduced career opportunities of teleworkers (Maruyama and Tietze, 2012).

Social isolation and poor communication with colleagues and supervisors have been reported major disadvantages of WFA (Wilson and Greenhill, 2004) given that a lack of informal communication with colleagues and supervisors and shortage of social interaction may decrease the organizational identification of remote workers and constraint the affinity with the organization’s values and goals (Ammons and Markham, 2004) as well as spontaneous collaboration and innovation processes in organizations (Yang et al, 2022).

Remote work also has a societal and environmental side to it, in the sense that less travel may contribute to diminished CO2 emissions, and therefore lower pollutions levels (Handy & Mokhtarian, 1996) as well as saving on travel expenses (Tremblay & Genin, 2007). Further, the access that remote workers may provide distant and vulnerable populations regarding vital areas like education and healthcare is crucial. In fact, the possibility of delivering healthcare services remotely assumes a greater relevance in exceptional contexts, as crisis or catastrophes that restrict the movements of citizens, as is the case of disadvantaged groups that cannot access to in-person interventions (e.g., refugees; migrants; persons that live in remote locations, or in areas where there is an active conflict), and as the case of persons with reduced mobility (Dores, Geraldo & Martins, 2022).

Traditionally, the adoption of this flexible way of working has been presented as a planned choice that entails a period of design, preparation, and adaptation to allow organizations to effectively support employees’ productivity and ensure them better work-life balance (Allen et al, 2015). However, the COVID-19 pandemic has forced most organizations to adopt this modality of work, in most cases without

Where Are You Going, Work From Anywhere?

providing workers with the skills and conditions required for WFA and without promoting adaptive defense and coping mechanisms to deal with the challenges present in a crisis event (including role conflict, ambiguity, fear, anxiety, and even grief) (Wang et al, 2021; Maritsa & Kalemis, 2020).

As the social confinement brought about by pandemic-driven lockdowns was extended for months, impeding in-presence contact with colleagues, social isolation may have been a relevant job characteristic related to WFA in times of COVID-19 (Sako, 2021). During the pandemic, WFA meant that employees had to share their workspace with family members, such as partners and children who might have been engaged in distance-learning primarily. Therefore, it is evident that WFA has brought about a constellation of issues in countries where social confinement was adopted for extended periods of time (Sako, 2021). The houses that usually congregated the family members when no work or school activities were taking place were often ill-prepared to become the learning grounds and workplace of multiple people simultaneously (Xiao et al, 2021), thus generating a distracting environment, which as previously studied may lead to an increased job dissatisfaction (Lee & Brand, 2005). Research suggests that a positive full-time WFA experience is usually linked with the quality of and control over the workspace, including control on light and acoustic isolation (Raguseo, Gastaldi & Neirotti, 2016), as well as a workspace that is sufficiently separated from the living areas (Mello, 2007).

MAIN FOCUS OF THE CHAPTER¹

Method

To structure this work, an approach based on data mining terms from scientific journals using VOSViewer was used. VOSViewer is a software for creating and analyzing bibliometric networks based on data from bibliographic databases.

In order to compare the literature before and after COVID19 regarding motivation and e-learning/remote learning, the same search criteria were used with the exception of the time frame. Thus, a search was conducted on the Web of Science platform using the Boolean equation “Remote Work” OR “telework” OR “work from anywhere” OR “telecommuting”. Language was limited to English, paper types were refined to articles; topics were limited to the Business, Management, Social Sciences and Psychology areas.

For the pre-COVID19 period, the papers from the 1st of January of 2010 to the 31st of December of 2019 were used, resulting in a total of 469 scientific or academic papers; the post COVID19 era was indicated as spanning from the 1st of January of 2020 to 31st of December of 2021, summing up 284 papers.

Understanding the most frequently used terms as well as how they co-occur in the literature enables an overall idea of the type of issues and relationships being studied and presented in the literature as hot topics, displaying trends and how the nomological networks are being construed. The VOSViewer Software adds the possibility of visualizing the research field’s literature via graphic networks.

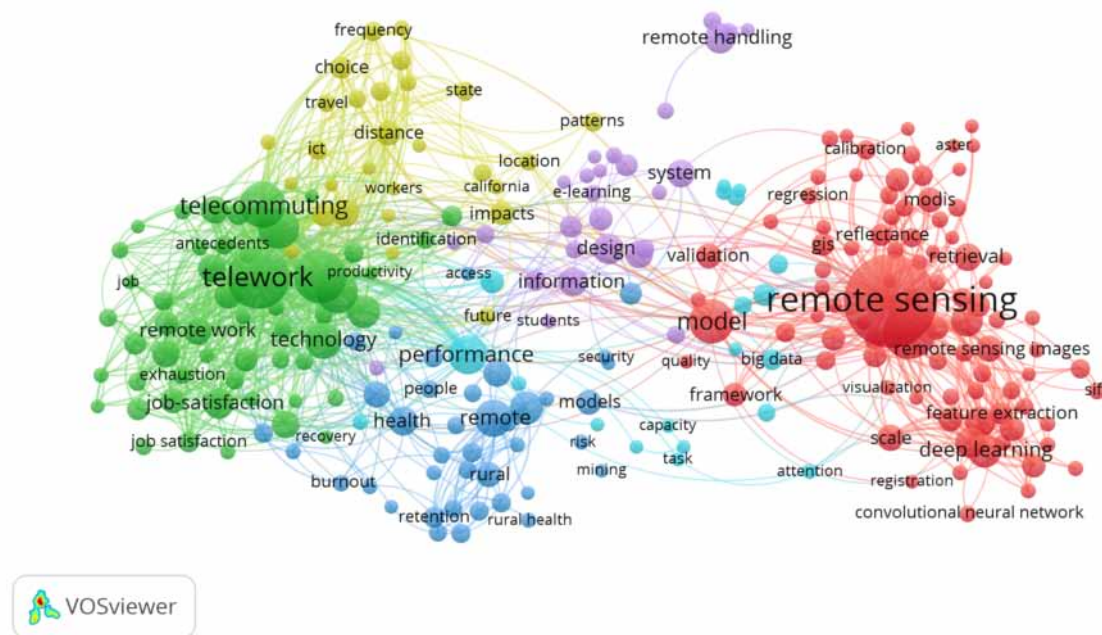
VOSviewer (version 1.6.10) was developed by scientometricians (Van Eck & Waltman, 2014) to aid the scientific literature systematic review. In this paper the co-occurrence of terms was used, where a term should appear at least 10 times in order to be considered in the analysis; full counting was required (for each paper we wanted the number of times a term appeared to be considered and not just have a yes or no approach to if the term appears in a given text or not – this would be fractional counting).

This software uses both a mapping and a clustering technique that jointly provide a framework (Waltman, Van Eck & Noyons, 2010); in this case, the layout (i.e., the location of the terms in the map) is determined by the mapping technique, whereas the clustering technique groups the terms by color, creating visual landscapes of the literature.

Results - Research on Remote Work in the Pre-COVID19 World

The map generated by the search concerning the pre-COVID reality can be observed in Figure 1

Figure 1. VOSViewer map of term co-occurrence for literature from 2010-01-01 to 2020-01-01



Thus research on this area can be divided into six closely related and mostly overlapping clusters:

1. **Technology for worker performance assessment/insurance** (*red cluster, 189 items*) – with key words like remote sensing, deep learning, dynamics, fusion, calibration, quality assessment this cluster indicates that in the pre-COVID19 era one major source of interest in research was how technology might help ensure that workers actually were doing their part in the work they had been contracted to do, in a context where they were not in the same premises as their boss.
2. **Psychosocial aspects for remote work** (*green cluster, 53 items*) – In this cluster we see words like exhaustion, job satisfaction, work-life balance, trust, productivity, personality, antecedents,

Where Are You Going, Work From Anywhere?

workplace indicating that another important topic in the pre-COVID19 literature was the impact of WFA on the worker's life quality and well-being.

3. **Healthcare in remote areas** (*blue cluster, 39 items*) – this cluster seems to address mostly aspects regarding the potential of WFA as a way to provide health and mental-health care access to people in remote areas. Key terms include nurses, community, burnout, remote health, mental health, rural health.
4. **Choosing remote work** (*yellow cluster, 28 items*) – This cluster includes key words like accessibility, adoption, barriers, commute, distance, mobility and time. It seems to point to the need of thinking about what can make workers opt to remote work.
5. **Remote learning** (*purple cluster, 27 items*) – with key words like distance education, e-learning, engineering education, remote collaboration, remote labs, space, science and virtual reality, this cluster seems to focus on the realities of learning and building knowledge together.
6. **Innovation** (*turquoise cluster, 20 items*) – with key words like attention, communication, creativity, performance, network, entanglement, cloud computing, future and teleportation, this cluster seems to be focused on the future and on innovation generated by and for WFA.

Discussion

Before the COVID19 pandemic, the literature seemed to be focusing on the social and technological implementation of WFA. The main trend (first cluster) seems to focus on the technological advances that allowed for the remote management of workers.

The way organizations manage and conduct business, how workers and teams interact to accomplish work and fulfill their objectives has fundamentally been changed by WFA (Pinsonneault & Boisvert, 2001).

WFA's impact cannot be reduced to the mere point of view of the ICT usage. Rather, WFA involves complex relationships between work environments, motivations, management and work practices, in addition to ICT use (Bélanger, Watson-Manheim & Swan, 2013).

It is useful to remember that organizations are socio-technical entities. The technical subsystem of organizations incorporates elements that have to do with technologies, policies and practices related to the modes of production (e.g. the type of ICT support for the work), the actions required for performing work (e.g. the tasks), the strategies for standardizing the process (e.g. policies that might be supported by ICT or not), etc. (e.g., Brown, 2002). In the WFA context, the technical subsystem describes elements like the types of ICT, the quality of the facilities, the reward and compensation practices and packages of the company, task design when WFA, etc. (Bélanger, Watson-Manheim & Swan, 2013).

The psychosocial aspects of WFA (cluster 2) deal with the human side of WFA. Namely, the fact that remote workers may suffer from a sense of isolation from other colleagues and supervisors (Bailey and Kurland, 2002). Further, reduced communication with co-workers may be seen as a job demand related to decreased job satisfaction and reduced perceived career opportunities, due to lower organizational visibility. In contrast, WFA decreases irrelevant and distracting interactions with colleagues, leading to fewer interruptions, one of the main advantages of WFA (Khalifa & Davison, 2000, Bailey and Kurland, 2002). Reduced levels of communication with peers may be seen as the source of additional time resources, that may have as a consequence higher productivity.

Another perspective is that WFA enables individuals to better combine work with family-related demands (Ammons & Markham, 2004; Johnson et al., 2007) and enhances work-life balance. The possibility to better attend the needs of children and other family members (such as aging or disabled parents) can

be seen as a valuable resource for remote workers and leads to positive work-related outcomes, including higher levels of affective (satisfaction) and cognitive (perceived advantages) elements related with WFA.

Being able to work from home in case of sickness has been mentioned as an advantage of WFA (Johnson et al., 2007), but there is of course a different perspective which can be understood. WFA in case of health issues is an alternative to workplace presenteeism, defined as “attending work while ill” (Johns, 2010, p. 521), a practice doubly harmful in the sense that it is conducive to low productivity for the worker and bears risk of contagion to other members of the workforce. It is likely that individuals who wish to fulfill their work obligations under any circumstances may be less stressed because of the WFA possibility, since they can keep pursuing their objectives while recovering from a health issue; in these instances, this factor can be an important resource to increase satisfaction with WFA. For workers that have different priorities, WFA can present an additional and unwanted challenge when dealing with a health-related challenge, because they might be unable to disconnect from work at all if WFA is a possibility.

As remote workers have reduced or eliminated commuting time to and from home, travel expenses are also brought down (Tremblay and Genin, 2007). The ability to make such savings, especially when, for example, a war leads gas prices to rise steeply, can also be a factor increasing remote workers’ satisfaction with WFA. On the other hand, for families with children who use their vehicle to transport their children to and from care and learning facilities, the saving on traveling costs might not be so significant.

Gender issues in WFA have been ambiguous. Women seem to value WFA more than their male counterparts (Belanger, 1999; Mokhtarian et al., 1998) as the practice facilitates the care of the household, children and other family members, tasks still largely expected to be performed by and even imposed to women by society. Women report seeing more advantages to WFA than men (Mokhtarian et al., 1998), and they have been more motivated by flexibility and increased autonomy (Chapman et al., 1995) including the possibility to plan work and family time (Lim and Teo, 2000) as numerous studies have identified WFA as a strategy that allows workers to care for dependents (e.g. Hartig et al., 2007).

Further, WFA could increase career opportunities for women (Schreiber, 1999), as returning to work from maternity leave can be simplified. On the other hand, as society becomes more egalitarian, men are becoming more involved in household and family care issues, which might reduce the existing differences between men and women regarding the perspectives on WFA.

The importance of remote Healthcare (cluster 3) and Education (cluster 5) was become evident during COVID19, but even before the pandemic the literature had become interested in the potential of these applications of WFA.

The characteristics that can make workers choose WFA (cluster 4) were also a matter of significance in this area. The literature points mainly to characteristics related with with time-planning skills, time-planning autonomy and self-regulation as relevant for the workers who choose to WFA (Morgan, 2004), especially for families with young children (Ammons and Markham, 2004). Previous research has shown that remote workers’ effectiveness depends on being able to work at peak efficiency hours, whatever they may be (Martin and MacDonnell, 2012). Therefore, in order to increase productivity while WFA, good time-planning skills as well as self-regulation are considered as crucial resource (Harpaz, 2002).

Thus, WFA can make it possible to establish a rhythm that best suits individual preferences because remote workers have greater control over their work situation and timing (Tremblay & Genin, 2007). However, and somewhat paradoxically, remote workers seem to face lower visibility and lower supervisor support (Cooper and Kurland, 2002). It is proposed that the more workers work from home, the less opportunities they have to socialize and of gaining support from others at work (Lapierre et al., 2015),

Where Are You Going, Work From Anywhere?

especially from their supervisors – bringing is back to the notion of work and organizations as socio-technical entities (Bélanger, Watson-Manheim & Swan, 2013).

Successful remote workers are able to bridge this gap and develop trust in their own ability as well as relational trust from co-workers and supervisors at an early stage (Makarius & Larson, 2017). Trust is a well-known consensually important aspect of knowledge working in virtual teams (Yakovleva et al., 2010); and supervisor's trust and support are very crucial resources for remote workers related to perceived career opportunities and satisfaction with WFA (Welchans, 1995).

There seems to be a strong relationship between the physical working conditions and employee effectiveness and health (de Croon et al., 2005). An inappropriate working place impacts negatively employee effectiveness (Bailey and Kurland, 2002), whereas a suitable working place can be considered an important productivity resource, as work ergonomics and work conditions, such as noise, temperature and others, tend to influence employee job satisfaction (Morgeson & Humphrey, 2006). Although most homes might not be prepared with the infrastructure to include a home office, remote workers would do well to ensure optimal physical working conditions. Further, a working place traditionally reflects the status of an employee in an organization, and WFA diminishes this aspect.

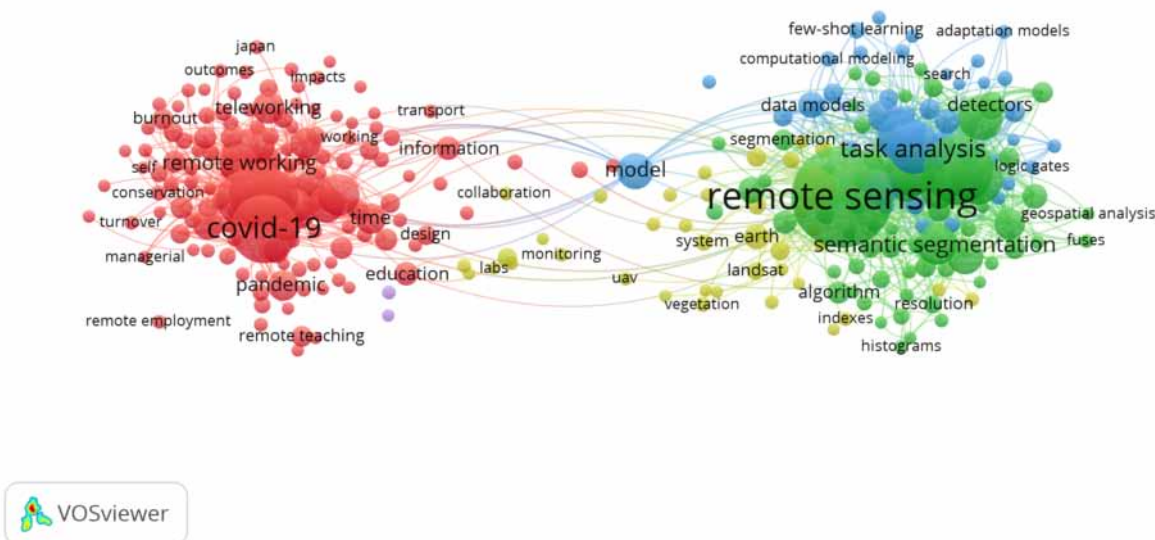
Inadequate access to technology and documents has been found as one of the main disadvantages of WFA (Perez Perez et al., 2003), and WFA has been found more successful in organizations that provide remote workers with appropriate tools and technology (Cooper and Kurland, 2002). Thus, access to the organization's resources can have an important role in increasing productivity and satisfaction with WFA.

Innovation mechanisms (cluster 6) in teams require trust (Dovey, 2009), a process that virtual collaboration of WFA may render harder to attain.

Prior to COVID-19, studies found a negative correlation between time spent commuting and individual and team performance (Elst, Verhoogen & Godderis, 2020). Furthermore, the amount of time spent on WFA and the extent of face-to-face interaction were found to affect negatively the relationship between professional isolation and positively the relationship between job performance (Golden, Veiga & Dino, 2008). In line with previous research (Fonner & Roloff, 2012), the use of digital technologies to communicate may only partially alleviate the feeling of isolation experienced by workers, comparing with the social contacts that are usually experienced in the workplace as well as in social life (e.g. meeting with friends or attending group events).

Results - Research on Remote Work in the Post-COVID19 World

Figure 2. VOSViewer map of term co-occurrence for literature since 2020-01-01 to 2022-01-01



1. **COVID19 impact** (red cluster, 136 items) – This “super-cluster” agglomerates all sorts of consequences and impacts from COVID19 on remote work. The keywords in this cluster seem include of course COVID19, anxiety, benefits, challenges, crisis, emergency remote teaching, impact, internet, IOT, life, management, motivation, mental health, self-efficacy, stress, work-life balance, workaholism.
2. **Technology for worker performance assessment/insurance** (green cluster, 69 items) – with key words like remote sensing, deep learning, dynamics, fusion, calibration, quality assessment this cluster indicates that in the post-COVID19 era how technology might help ensure that workers actually were doing their part in the work they had been contracted to do, in a context where they were not in the same premises as their boss.
3. **Task analysis in learning** (blue cluster, 49 items) – the keywords in this cluster include task analysis training, attention, adaptation models, semi-supervised learning and learning transfer pointing to an interest in how learning may lead to civilizational development.
4. **Specific segments** (yellow cluster, 19 items) –with key words like geospatial analysis, ship detection, convolution, optical remote sensing and optical imaging this cluster seems to point to very specific areas of work where the distance is an important element that must yet be addressed.

Where Are You Going, Work From Anywhere?

5. **Infrastructure** (purple cluster, 10 items) – main keywords include augmented reality, collaboration, labs, network, virtual reality, collaboration this cluster points to the need to have a reliable infrastructure in order to realize all the remote work projects and perspectives.

Discussion

In the Post COVID19 world, the pace of publications became more prolific than before; from 469 papers in 10 years (avg=46,9 papers/year) to 284 papers in 2 years (avg=162 papers/year) fitting our criteria.

The first cluster focusing on the impact of the pandemic on WFA seems to be the main focus of research. WFA has affected the well-being and productivity of employees with no prior remote work experience and to identify specific work conditions affecting remote work during the COVID-19 crisis is imperative. (Galanti et al, 2021).

The technological advances (cluster 2) account for how the smooth transition to remote working was in 2020 for the majority of workers. Companies that were oriented towards WFA and were not prepared, accelerated investments in cloud-based software tools, eSignatures for documents, and purchased equipment to support WFA. With a surge in demand for these specific technology areas, start-ups in cloud-based technologies attracted large-scale, early stage investments. Moreover, COVID-19 has shifted patent applications toward technologies that support WFA (Sako, 2021), meaning there was a concerted effort in enabling workers to communicate better with each other.

Task analysis in learning (3rd cluster) is an interesting cluster. A phenomenon related to remote work is freelancing, because WFA is associated with tasks, not jobs in a traditional sense (Sako, 2021). Thus, like workers, learners will need to disaggregate their learning outcomes in specific tasks that have the characteristics of minimal physical requirement, full control, well-defined milestones and deliverables (Sako, 2021).

Specific segments (4th cluster) is a cluster coincident with the more recent robust evidence of how remote work varies by occupation. In the U.S., for example, managerial, professional, and related (MPR) occupations, a category including managers, financial analysts, engineers, computer programmers, and lawyers counted for circa 41% of the workforce. This segment of the workforce was found to be among those whose jobs could be performed in a variety of locations, including at home (Krantz-Kent, 2019). Among these professionals, people most likely to work solely in their workplace are healthcare workers (e.g. doctors, nurses, therapists) and technical workers (e.g. engineers, architects) whereas, people employed in arts, design, entertainment, sports, and media and in education, training, and library occupations were most likely to WFA (Sako, 2021).

The most critical area to focus on in this context seems to be medicine. The coronavirus pandemic generated a steep increase in demand for health care that led to relaxation on regulation regarding telehealth, expanding coverage and healthcare reach in many cases. It is thus believed that as a result of the bioevent, over time, the combination of face-to-face healthcare services and remote providers has the potential to create a paradigm shift in healthcare. In-person hospital/clinic visits can be reserved for procedures requiring a physical examination, intervention or interaction, while patients with chronic diseases may be excused from coming in frequently for visits, an added challenge for rural patients, people with disabilities and other vulnerabilities. Remote technologies will be able to monitor health related signs and symptoms, and telehealth consultations can cover a wide array of medical requirements.

Infra structure (5th cluster) points to a key element that refers to the conditions that enable WFA. Aside from removing regulatory constraints to assist WFA, governmental action may also play a critical role

in encouraging investment in broadband internet. While most developed countries already have access to (and have been using) high-speed internet, the gap should be reduced for people with less access via the establishment of infrastructure (e.g. antennas and cables for internet) for people with reduced access.

CONCLUSION

Telecommuting growth had been a result of advances in ICT, as well as organizational attempts to increase internal efficiencies, improve competitive advantage, and respond to calls for flexibility in work hours (Hill et al. 2010); with the COVID19 pandemic, this trend has virtually exploded in popularity all over the world as lockdown measures made it impossible for most people to work otherwise (Sako, 2021).

The literature before and after COVID19 in this field has clearly suffered major changes. Although WFA was already trending before the bioevent, the research was somewhat dispersed, and the major points of interest had to do with addressing managerial concerns of how to insure and assess performance in this modality of work, as well as the workers' psychosocial aspects, because WFA was indeed a choice, and one that seemed to require some nudging. The other interests of the scientific literature seemed to circle around applications for remote interventions, and thus WFA (e.g. healthcare and education) as well as innovations.

After the pandemic and because lockdowns made WFA mandatory for most people, the research focused first on the impact of the COVID19 bioevent on people, including at their workplace. The clusters of psychosocial aspects of WFA and choosing WFA disappear, although it is clear that research addressing the impact of COVID19 does care for the psychological and social aspects of WFA in the context of the pandemic: It is perhaps because this is no longer an option, that researchers seem to turn to more specific and operational aspects of WFA, namely task analysis in learning, practical implementations for specific segments and infrastructure that makes WFA possible.

Traditionally, WFA had been seen as a win-win scenario for employees and employers, making it possible for workers to choose from different talents, work hours and rhythms, to reduce real estate (including office and home rents) and travel costs, to motivate employees and to help workers with work-life balance challenges (Madsen, 2003). COVID19 highlighted other difficulties and relevant aspects that are indissociable of traditional work. People like to socialize and the workplace is a prime opportunity to do so, as personal communication has been shown to be more persuasive and allows a better observing of "social elements" of human interactions (OECD, 2020). This socialization leads to team and trust building among colleagues, organizational culture identification and acculturation, etc.

In general, people prefer to collaborate with others they already also see in person, raising the value of developing real-world contacts, since digital collaborations with people you already know and like or trust are then much more likely.

Thus, the question remains on how if at all companies will adopt WFA after the end of the pandemic considering all the benefits, this may bring to employees, organizations and the society, given the need to address the challenges associated with employees' physical absence (e.g. less spontaneity, less strong interpersonal relationships, etc.). As for future studies, attention for future studies should be paid to the emerging dynamic evidence from a recent US poll where 61.9% of hiring managers interviewed stated that it is in their future intentions to rely more on remote work (OECD, 2020).

These trends do not mean that in-person work or interactions, are dead. Developing networks and connections is still important in many levels (personal, social, work-wise...) and face-to-face interactions play

Where Are You Going, Work From Anywhere?

a key role here. However, the opportunity that WFA brings in allowing people to leave for destinations they may prefer, will broaden opportunity and growth for everyone. Thus, although the current crisis has been harrowing for many people, the success that many organizations and workers have had with WFA under these exceptionally difficult circumstances points to the possibility of a promising WFA future.

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KEY TERMS AND DEFINITIONS

Boolean Equation: The string of words used to conduct a literature or bibliometric search, typically separated by connectors like “AND,” “OR,” and “NOT.”

Job Satisfaction: How much a person enjoys the work they are engaged in. This construct is multi-dimensional and includes intrinsic factors (how much a person is satisfied with the tasks they are doing, the impact they have in the community, etc.) as well as extrinsic factors (e.g., satisfaction with salary, career perspectives, etc.).

Remote Learning: The conduction of pedagogical activities that is not presential and typically includes the use of Information and Communication Technologies (ICTs).

Tattleware: Subreptitious software that is used specifically to spy on/control remote workers, collecting and reporting activities conducted by workers to their supervisors.

Telehealth: The provision of health-related services that is not conducted in a face to face setting, that may include medical doctor appointments, psychotherapy, physical therapy, and other interventions.

Work From Anywhere (WFA): Work that can be conducted without the need to be in a specific location, usually enabled by the use of Information and Communication Technologies (ICTs).

Work-Life Balance: The ability to harmonize tasks, responsibilities, and commitments from work as well as other aspects of life, including family, health, social, etc.

Chapter 12

Making Leadership Development Effective: Lessons From COVID-19 Experiences

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ABSTRACT

The exploratory chapter discussed an important gap in the development of leaders. It identified the understanding of leadership and leadership mindset as hidden drivers of leadership behaviors rarely included in leadership development. The review identified four categories of leadership mindset that have varying effects on behavior: fixed/internal, fixed/external, growth/internal, and growth/external. The best mindset that drives positive leadership behaviors that lead to the creation of a positive work climate is the growth/external mindset. The chapter reviewed the role of values, understanding of human nature, the dignity of the human person, emotional intelligence, and leaders' core self-evaluation in the formation of the growth/external mindset. A future recommendation is the development of a scale for the mindsets and an empirical study aimed at establishing the differential effects of the mindsets on leadership behavior.

INTRODUCTION

In late 2019, the world came to know of a virus labeled COVID-19. Sufficient action was not taken to stop its spread because people assumed its effect was localized. By September 1, 2021, the virus had spread worldwide, infecting 218 million people and causing 4.52 million deaths. It has disrupted the economy of nations, the productivity of organizations, and distorted the relationships between the people. COVID-19 has led to the development of new work terms such as “old normal,” “new normal,” and “next normal.” The virus has proved resistant to human efforts and has persisted in devastating the world economy. Although its end has been tied to the discovery of vaccines, this has proven to be incorrect. It appears that the virus will remain in the business world; hence, organizations must learn from what happened during this period.

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Some organizations were negatively affected early in the pandemic, while others survived for some months before decline set in. Others were unaffected and grew throughout the pandemic. For instance, the record has it that a few months into the pandemic, Zoom grew its revenue by 300%, while the aviation industry collapsed from the onset. Organizations put in place short-term survival strategies to handle the immediate challenges posed by the COVID-19 virus and long-term strategies to achieve relevance post-COVID-19. However, some organizations overemphasized the short-term strategies over the long-term, thus hindering the possibility of their relevance after the pandemic. For instance, early in the pandemic, a survey of webinar participants in Nigeria showed that within the first month of the COVID-19 lockdown, 72% of the participants had experienced salary reduction, 64% of them were not consulted about the planned salary cut, and 60% said the action of the organization affected their relationship with the organization. This implies that some organizations damaged their relationships with employees because of how they handled their immediate survival needs. This is attributed to the quality of leadership behavior enacted during COVID-19.

This book chapter reviewed the role of the understanding of leadership and leadership mindset in developing a leader's default style. The chapter borrowed its argument from the cognitive dissonance theory (Vaidis & Bran, 2019), which suggests that holding two conflicting emotions or beliefs leads to cognitive dissonance, which the individual attempts to resolve by regulating emotions or beliefs to attain consistency. Thus, a leader with a mindset and understanding contrary to humane leadership will adjust to fit the hidden drivers. The chapter concluded by linking leadership mindset to specific leadership behaviors and proposing how leaders can develop an effective mindset that drives the creation of a positive work climate in which employees can perform optimally.

BACKGROUND

The response and actions of organizations during COVID revealed the quality of their leaders. Leadership behaviors create either a positive climate that enhances employee productivity or a hostile climate that hinders employee productivity. What happened in COVID-19 questioned the effectiveness of the leadership development implemented by organizations as leaders did not adhere to the recommendations in the light of the challenges that arose from COVID-19. Some leaders had no courage or willingness to adhere to what they had been taught and thus, defaulted to the leadership inherent in who they were and what they believed (Beer et al., 2016). These factors are the hidden drivers of leadership behavior. So far, leadership development has concentrated on how to run an organization and manage its resources but has paid little attention to the hidden drivers of leadership behaviors. This led to a recent comment by Lencioni (2020, p.46) thus:

Majority of the books I have written focus on how to be a leader: How to run a healthy organization, lead a cohesive team, manage a group of employees. However, over the years, I have come to the realization that some people will not embrace the instructions I provided because of why they wanted to become a leader in the first place.

The author drew attention to the critical lapse in the development of leaders since the current development process overemphasizes the known leadership styles and their development while caring less about the hidden drivers of the styles. COVID-19, thus, revealed that most leaders know and appreciate the

leadership styles that drive positive organizational climate but fail at implementing same since the drivers of their default leadership styles could not support the preferred leadership style. For instance, most leaders realized that the pandemic required compassionate and empathetic styles to care for employees, yet the behavior enacted drove organizational productivity with little regard to employee wellbeing. This conclusion was also confirmed by past authors such as Beer et al. (2016) and Gurdjian et al. (2014). The argument in this book chapter is that the development of leaders must factor in the hidden drivers of behavior to ensure leaders act in accordance with the training they received.

THE EVOLUTION OF LEADERSHIP THEORY

This section highlighted the various theories of leadership and the roles they played in the development of the entire leadership thought. A detailed explanation of each theory will not be done here. Arising from the various definitions of leadership is the fact that effective leadership must satisfy the characteristics of the actors involved in leadership effectiveness, namely, followers, situation, and leader. Horne (2011) traced the origin of leadership to the introduction of a hierarchy in which someone would have to emerge as a leader in the hierarchy. When this hierarchy is accepted and legitimized, leadership becomes accepted and respected.

The great man theory of leadership (Van Seters & Field, 1990) recognized people who lived in the past and were successful as leaders and recommended that imitating their personality would lead to replication of success as a leader. This theory moved from individual to trait possessed by the individual. The failure of this theory arose from having too many traits that could not be effectively organized, the inability to have consistent traits that consistently give rise to leadership success, and the traits that could not be copied. The influence era (Van Seters & Field, 1990) de-emphasized the role of traits and emphasized the role of relationships in leadership effectiveness. The Source of power as a means of influence was emphasized. The behavioral approach recognized the role of leadership behavior in the management of people. Behaviors were categorized as concern for people and concern for production. The combination of these produced four different leadership behaviors. A popular aspect of the behavioral approach is the Blake and Moulton (1964) model. This model recognized the existence of one best leadership style and neglected the influence of followers and situations in the enactment of leadership behavior (see Mondy et al., 1980).

The situational leadership theory is the first theory that attempted to factor in the role of followers' characteristics and situations in leadership behavior (Hersey, 1984). This theory recognized that leadership operates at the intersection between followers' characteristics, leadership behavior, and situation. Effective leadership behavior was seen as that which harmonizes the demands of leaders, followers, and situations. The situational leadership theory discarded the idea of one best leadership style that operates always. The value-based theory of leadership advocates that people should live their values while leading others. The styles in the value-based theory are autocratic, transactional, transformational, and servant leadership styles. Based on this, leadership development was based on how people could enact these styles in driving organizational climate.

ISSUES ARISING FROM COVID-19

COVID-19 came without notice, unleashing its devastating effects on nations, organizations, and individual functioning within them. Its effects were universal but not evenly distributed. For instance, while Small and Medium Enterprises (SMEs) in Nigeria were severely affected, some other organizations were not (Dang & Nguyen, 2020; Ketchen & Craighead, 2020). COVID-19 revealed three critical facts about organizational profitability and organizational relationship with employees. The first is that sustainable profitability can only happen when the organization leverages the collective intelligence of all its participants through their collaboration and cooperation. This means that the organizational climate must support trust and the psychological safety required for collaboration and trust (Simek, 2014). The second is that the decisions made by leaders in handling the challenges arising from COVID-19 demonstrate the organization's scale of preference in its value chain. Organizations have various factors along the value chain that can give them a competitive advantage. Thus, the value organizations place on the factors is reflected in the decisions they made regarding the factors. For instance, it was reported that 90% of SMEs in Nigeria reported a decline in income early in the pandemic and reacted by releasing their employees (Falokun, 2020; Lakuma & Sunday, 2020). This decision shows their scale of preference in their value chain and (thirdly) shows the position of human resources on the scale of preference.

Incidentally, most organizations did not recognize that their employees had concerns about survival just as they did. They also overlooked the overlapping nature of these concerns and how working collaboratively could lead to a win-win outcome. Such organizational concerns include (Cliff & Court, 2020), length of the economic disruption, security, nature of work style after the pandemic, and management of employees. Employees' concerns included insecurity, health issues, loss of job, and managing the blurring work-family interface rising from remote work. Harter (2020) showed that 39% of employees were concerned about poor communication with their leaders, 54% were ill-prepared for the work style in the new normal, and 54% feared that their wellbeing was not guaranteed in the pandemic. The overlap between these concerns and the possibility of a joint solution positions leadership behavior as central to harmonizing organizational and individual concerns.

Another issue COVID-19 revealed is the need for the organization and employees to co-create the post-COVID-19 work structure (Amah, in press). Most employees in Nigeria started working remotely during the pandemic, and there were human, material, and resource constraints in making the shift from office to remote work. Before this shift, people had taken for granted that the only mode of work was the office. However, remote work has shown that it is possible and beneficial to both the organization and the people, pointing to the fact that the organization and its people should jointly develop the future of work. This collaboration will be beneficial in determining the eventual remote configuration and what will be from office or hybrid (partly in office and remote).

Leadership creates a climate that enhances or discourages the collaboration needed to resolve concerns jointly. Early in the pandemic, the organization and its employees were aware of the adverse effects on revenue. They both recognized that something needed to be done to keep business afloat in the short term and to position it for survival after the pandemic. Rather than assuming sole possession of knowledge and acting independently of employees, leadership can create a climate that encourages open and frank communication to chart a way forward jointly. Leadership behaviors identified as critical for the survival and repositioning of organizations include empathy, flexibility, compassion, ability to manage change, and communication (Amah, in press). These are people skills needed to build the relationships that drive productivity.

In times of crisis, people polarize into fear/helplessness or actualization/engagement, depending on how leaders handle their concerns. Leaders who have trust, compassion, stability, and hope will drive actualization and engagement, while those without these qualities will drive fear and helplessness. This is because every crisis has its attendant concerns, and people look up to their leaders to assure them that despite their concerns, they can jointly pass through the crisis and come out successfully on the other side. As the world moves toward recovery and organizations plan long-term relevance (which requires the collective intelligence of organizational participants), people skills will play an even more critical role. Hence, leaders must learn to build psychological trust within their organizational environment, which will unleash the collaboration and cooperation needed to engage all organizational participants to move the organization forward.

COVID-19 presents technical, emotional, and behavioral opportunities for organizations to evaluate the behavioral qualities of their leaders that drive short-term survival and long-term sustainability. Evidence from past studies has shown the lapses in enacting desired leadership behavior that leads to poor organizational performance (see Aladejebi, 2020; Falokun, 2020; Fate Foundation, 2020; Lakuma & Sunday, 2020; Mulley-Goodbarne, 2020). COVID-19 has also highlighted two cogent questions: why did leaders fail to utilize their pre-COVID-19 leadership developments? As Lencioni (2020) highlighted, are there hidden factors that are not taught but which should form a part of leadership development now and post-COVID-19?

IMPLICATIONS OF COVID-19 ON LEADERSHIP BEHAVIOR AND DEVELOPMENT

Current leadership development programs emphasize the items shown in Figure 1 below. The programs emphasize the link between results; the climate created by leaders, and their leadership behavior. Various leadership styles are usually reviewed and compared to highlight those that should be encouraged and developed. Some programs link effective leadership to the style that harmonizes the demand of followers and the situation and thus recommend using the situational leadership style. The failure of most leaders to use these styles to develop the needed collaboration reveals a conflicting emotion or belief whose resolution leads to the adoption of a contrary style. This shows the existence of hidden factors. Figure 2 shows the top and bottom of the iceberg to display what is responsible

Figure 1.



Figure 2.

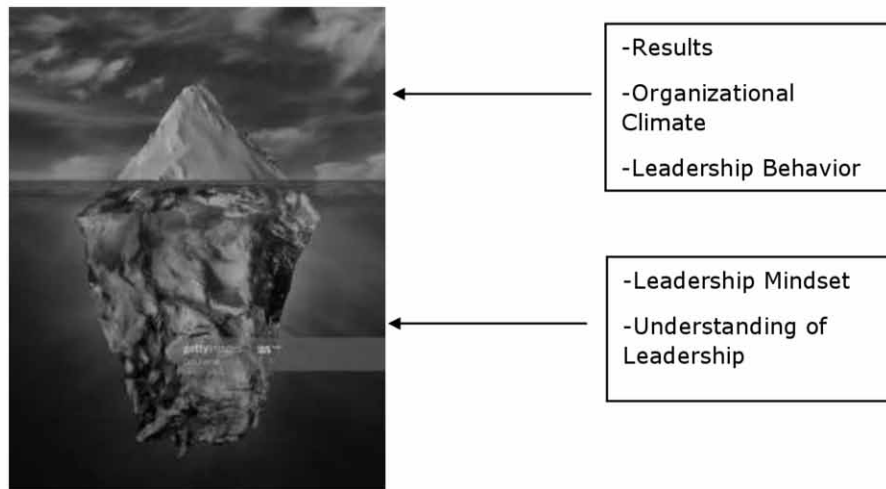


Figure 3.



Based on the combination of figures 2 and 3, the proposed model that should drive leadership development is in figure 3 above. Leadership development is an attempt to enhance the quality of leadership behavior in an organization. Hence, the failure of leaders to practice what they learned during development may be a pointer to a gap between what they learned and what they practice during a crisis. While reviewing past leadership development, Lencioni (2020) stated that current leadership development teaches leaders how to run a successful organization, manage teams, and lead a group of employees. It discovers and reviews various leadership behaviors and their effects on employee performance. In his words, "... people will not embrace the instructions I provided because of why they wanted to become a leader in the first place" (p. 46). The author alluded to the role of motive in driving the enactment of leadership behaviors. However, the motive is a general term that does not address the hidden reason people learn effective behaviors and cannot enact them when needed. A proper way to designate the reason is to use the terms "the understanding of leadership" and the resultant "leadership mindset" (see figure 2). Gurdjian et al. (2014) identified underestimating mindset as one source of failure in leadership development programs. In their words, "Identifying some of the deepest, "below the surface" thoughts, feelings, assumptions, and beliefs is usually a precondition of behavioral change—one too often shirked in development programs" (p. 4). Beer et al. (2016) stated that leadership training was successful in changing the attitude of supervisors. However, a follow-up study revealed that most had gone back to their pre-training views.

Thus, available evidence shows that leadership development emphasizes the top of the iceberg in figure 2, which comprises leadership behavior that drives organizational climate, which ultimately enhances employee performance. However, this book chapter advocates that leadership development must incorporate the understanding of leadership and the leadership mindset, which are often at the bottom of the iceberg but are the proper drivers of the top of the iceberg emphasized by current leadership development programs. Unless people understand the existence of these factors placed at the bottom of the iceberg and their role in driving behavior, Lencioni's concern will keep occurring since people will only appreciate the training but cannot implement the change because of the poor state of the underlying factors that drive their behavior. This proposal is not new in behavioral change processes; however, it has not been considered necessary in leadership development programs. For example, positive thinking is an attempt to help people realize that behavioral change is most effective through thinking differently and positioning one's mindset towards the expected behavioral change. Behind the idea of values-based leadership is the fact that leaders should draw from their values and those of others while crafting their leadership behavior since people's values and beliefs motivate and direct their actions (George, 2003). Thus, the above is possible because people want to avoid stressful cognitive dissonance arising from behaving contrary to values (Levy et al., 2018)). Leadership values will therefore draw much meaning from the understanding of leadership and leadership mindset. In filling this gap, it is therefore proposed that trainers should question how leaders form their leadership values and inculcate the finding into leadership development to complete figure 3.

THE CATEGORIES OF UNDERSTANDING LEADERSHIP AND LEADERSHIP MINDSET

This book chapter highlighted the importance of understanding leadership and leadership mindset in the paragraph above. This section explains these essential concepts, their categorization, and the behav-

ioral characteristic of each. Understanding of leadership reflects why individual values being called a leader. It reflects the driving force behind the desire to be a leader. For example, Greenleaf (1977) stated that the primary motive for servant leadership is to serve so that followers develop their full potential. This understanding of leadership is responsible for the exhibition of the characteristics of the servant leader that drive followers' positive development and enhance the relationship between the leader and followers. Leadership is earned through acts performed and not by position conferred. Followers refer to individuals as leaders because of the positive influence in their growth and development ascribed to the leader's actions.

Leadership can be understood from two angles: as a position of power and authority that attracts unique advantage or as a means to serve. When leadership is understood as a position, emphasis is always on the leader and his wants (Ngambi, 2011). However, when it is about service, emphasis is on the followers and how they can develop to be the best versions of themselves. Each of these understandings gives rise to a different leadership mindset. According to Hussain and Joshi (2016, p.1), mindset is "the attitudes, beliefs, values, and expectations one holds that act as the foundation of who you are, how you lead, and how you interact with them?" Some authors have alluded to the positive relationship between mindset and performance (Hussain & Joshi, 2016; Mackay, 2021). Conclusions drawn from various authors is that developing a positive mindset leads to better performance than that accounted for by qualifications, experience, and incentives (Dweck, 2006; Ngambi, 2011;). Mindset is, therefore, a major determinant of behavior, including leadership behavior. How people think of themselves and their abilities will affect how they live and relate to others (Smith, 2020). According to Mackay (2021, p.1) "How your people think, and feel will determine how they go about their work, how engaged they are and how committed they are to you, the organization, and their own goals." In pursuit of this, Hussain and Joshi (2016) established a positive relationship between specific dimensions of leadership mindset on employees' performance, loyalty, and competency development.

Mackay (2021) identified four types of management mindset: emotional intelligence, connection, growth, and performance. However, these are actual outcomes of the mindset. For instance, the emotional intelligence mindset refers to the consciousness of leaders that their behavior affects the performance of others. However, something deeper in the individual drives this consciousness. Therefore, this book chapter adopted the leadership mindset developed by The Arbinger Institute (2016) and Dweck (2006). The former categorized leadership mindset as internally or externally directed. When internally directed, the focus is on the leader and what he/she wants; when externally directed, the focus is on the followers and their development. Leaders who understand leadership as a means to attain position and power have an internal leadership mindset, while those who see leadership as a means to serve for the good of followers have an external leadership mindset. Table 1 shows the characteristics of internal and external mindset leaders.

Dweck (2006) categorized leadership mindsets as fixed and growth mindsets. Individuals with a growth mindset believe that intelligence and talent can be enhanced. When applied to leadership, a growth mindset has two broad implications that direct leadership behavior. The first is that the leader believes that intelligence and talent are distributed across the organizations and are not the exclusive possession of the leader. The second is that such a leader will ensure that people develop and grow. Thus, growth mindset leaders see the success of others as inspirational and view feedback as an opportunity to learn and grow. This mindset emanates from understanding leadership as a means to serve and hence the leader sees employees as people to be developed and who can drive change independent

of the leader. The growth mindset leader does not concentrate on who drives changes, but that change must be for the common good.

The fixed mindset believes that intelligence and talent are static and cannot be improved upon. Progress made as a leader implies that such a leader is highly placed and must have some superiority over those who are not. When applied to leadership, two implications can be drawn from this mindset. The first is that the leader sees leadership as a position and believes that any changes must come from him or must reinforce what he permits. The second is that the leader has an advantageous position that confers superiority and custodian of intelligence, and thus others must follow to reinforce his superiority. Two significant characteristics of leaders with a fixed mindset are seeing leadership success as demonstrating the leader's superiority over others and that feedback is an attack on this perceived superiority. Table 2 shows the characteristics of fixed and growth mindsets. The following comments summarize the difference between them, "Fixed mindset pulls us back and prevents us from realizing our full potential, while growth mindset makes us explore without being afraid of the challenges ahead" (Tech Tello, p.27). The following section will review the four typologies of mindset to establish the leadership mindset that gives rise to positive leadership behaviors that drive positive employee performance.

The two ways of categorizing mindset give rise to four typologies of leaders representing various combinations of the different mindsets (see figure 4)(Amah, 2019)

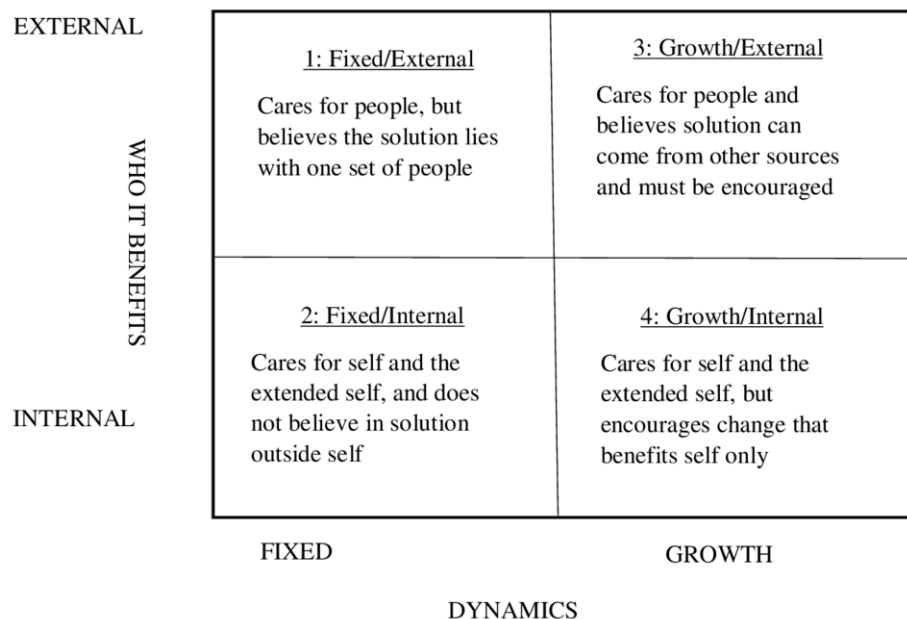
Table 1.

Internal Mindset	External mindset
Narrow-minded possibilities	Considers wide and better possibilities
Operates only within the narrow self-interest	Sees beyond self and operates outside the narrow self-interest
Has low opinion of others	Views others positively
Has low emotional intelligence	Has high emotional intelligence
Sees others as objects to be used and dumped when not required	Sees others as human beings to be developed and appreciated

Table 2.

Fixed Mindset (Status)	Growth Mindset (Service)
Abilities and intelligence are defined by nature and cannot be improved	Abilities and intelligence can be modified by experience and must be encouraged
Intelligence is restricted to certain people	Intelligence is widely distributed and must be recognized and nurtured
Only those who have the abilities and intelligence progress, while others must follow their directives	They vary from person to person and are not restricted to certain people
Does not allow freedom of thoughts and beliefs except when driven by the special few	Allows freedom of thoughts and beliefs since they are not the monopoly of the leader
Leader resists change, especially when such change does not come from him or threatens his power base	The leader allows changes either from followers or self since the leader believes he is not the sole custodian of creativity & innovation
Changes are allowed only if they come from the leader to fully reinforce his/her belief that he is the custodian of creativity and innovation	The interest of the leader is not who designs the change, but that the implemented change leads to the development of the common goal
Seeks those who can reinforce his self-esteem	Seeks those who challenge him to grow
Focuses on outcomes since results are the primary interest of the leader	Cares about the outcome and the means of achieving the same
Ignores feedback since it challenges his superiority over others	Accepts criticism as a way to learn and grow

Figure 4.



ESTABLISHING THE APPROPRIATE CATEGORY OF LEADERSHIP MINDSET THAT WILL DRIVE SUCCESSFUL LEADERSHIP DEVELOPMENT

Fixed/External Mindset

Leaders with this mindset are in leadership for themselves and demand respect and compliance from others. They care for others because of their external mindset, but only those like themselves, whom they refer to as “in-group” since these would constantly reinforce their superiority (Amah, 2019).

Fixed/Internal Mindset

Because of the fixed mindset, such a leader is in leadership for position and status. With an internal mindset, the leader cares for himself and believes that solutions to issues must come from him and none other. Such leaders resist any change that emanates outside themselves and see such change as a challenge to their superiority (Amah, 2019).

Growth/External Mindset

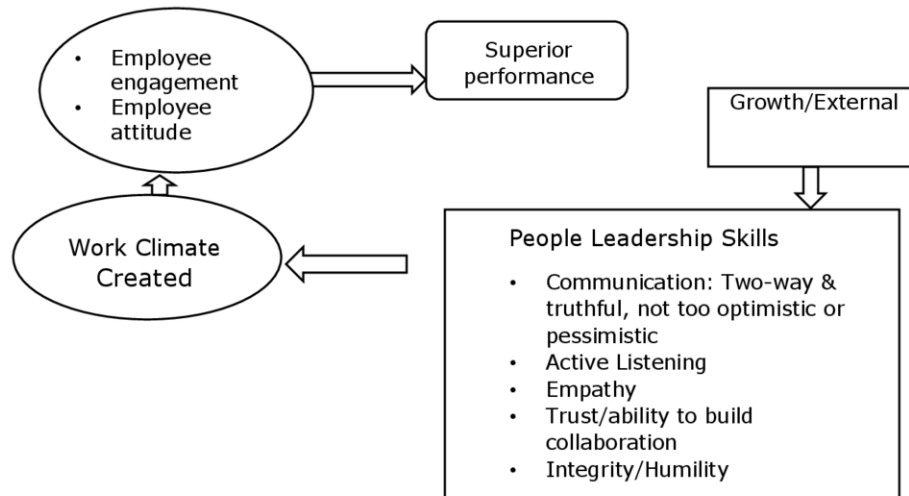
The leader believes that intelligence and skill are evenly distributed and must be recognized and supported. The external mindset helps the leader care for people and designate service as his reason for leadership. Such a leader concentrates on building a positive work climate that brings out the best in people and is not interested in the source of change, but that the change satisfies the common good of the organization (Amah, 2019).

Growth/Internal Mindset

The internal mindset, which makes the leader care for self and the extended self, hampers the belief that intelligence and skill are widely distributed. Thus, the leader only encourages change that benefits the self by reinforcing self. This type of leadership faces cognitive dissonance the most since the leader has an inner drive that intelligence should be harnessed from all organizational participants but sustains the conflicting belief that only the leader must advance such intelligence (Levy et al., 2018). It is not likely that a leader will maintain this style for long because in resolving the cognitive dissonance, the leader will either move to the growth/external or fixed/internal or fixed/external mindset to avoid the stress arising from cognitive dissonance (Levy et al., 2018)

The quality of the work climate created by the leader's behavior is a measure of the effectiveness of leadership (Luthans et al., 2002). Thus, the growth/external mindset will create better climates than others since the leader believes that individuals have intelligence and skill, and he is in leadership to serve and develop the people to perform at their best. Figure 5 shows the link between growth/external mindset, organizational climate, and employee performance.

Figure 5.



COVID-19 demonstrates four fundamental facts that must be understood as organizations build their businesses post-COVID-19. These are the importance of collective organizational intelligence in organizational productivity, the role of collaboration and cooperation in eliciting intelligence, the decisions that highlight the organization's scale of preference along their value creation chain, and the position of human resources in the scale of preference. All these, point to the role of people in creating a sustainable competitive advantage for organizations. However, not all employees can provide a sustainable competitive advantage. Those who provide sustainable competitive advantage are engaged employees who apply themselves wholly to their roles and go the extra mile in doing things required but not provided in their job description (de Oliveira & Rocha, 2017; Magem, 2017). Studies performed during Covid-19 have shown the importance of soft leadership behaviors in creating a positive work climate in which employees become engaged (Mickson & Anlesinya, 2020; Tran, 2020). Because of the beliefs and behavior of growth/external mindset leaders, they occupy a prominent position in creating the work climate characterized by soft leadership, as shown in figure 5. Other leadership mindsets may not provide such an environment. Therefore, Lencioni (2020) concluded that leaders with mindsets different from growth/external may engage well with leadership development but cannot apply the same, since their mindsets conflict with the leadership behaviors advocated for superior performance.

HOW TO DEVELOP A POSITIVE LEADERSHIP MINDSET

Leadership mindset can be viewed as a personality trait. Two controversies have trailed personality traits (Caspi et al., 2005; Mäkikangas et al., 2013; McCrae & Costa, 2003). The first is whether it is naturally determined and fixed, or it can be developed. The second is whether it achieves stability during the life of people. Rantanen et al. (2007) collated research results and concluded that hereditary factors determine between 30%-50% of personality traits and that stability in traits is achieved after 50 years. This

implies that personality traits can be developed. This agrees with the postulation of Dweck (2006) and The Arbinger Institute (2016).

- To develop a positive mindset (growth/external), one must understand the drivers of this type of mindset. The drivers are related to a positive evaluation of self and the understanding of people. They include:
- Values such as attitude to the dignity of the human person, and assumptions of human nature.
- Emotional Intelligence
- Core self-evaluation (self-esteem, self-efficacy, locus of control, moral self-concept)

Values

Values are “desirable trans-situational goals varying in importance that serve as guiding principles in the life of a person or other social entity” (Schwartz, 1994, p.21). Three aspects of values relevant to this discussion are brotherhood, love, and respect for others. Values are essential to individuals and act as a compass that points to what an individual will do or avoid in any situation. People hold unique values that represent their beliefs, desirable goals and relate to specific actions. People hold multiple values, which are arranged on a scale of preference representing the importance of each. The values people hold will affect their attitude, such as how they help and relate with others (Sagix et al., 2017). It will also affect the decisions they make and how they perceive their environment and behavior towards others.

Human dignity is “the special elevation of human species, the special potentiality associated with rational humanity or the basic entitlement of each individual” (Internet Encyclopedia, <https://iep.utm.edu/hum-dign>). The principle of dignity of the human person ensures people are respected and valued irrespective of their demographic differences. A value system that does not agree with this principle will segregate people. The growth/external mindset subscribes to the human dignity principle, and so leaders with contrary values will not have the growth/external mindset. This implies that a leader’s values and belief in the dignity of the human person will affect their behavior in the workplace.

Human nature is the “core characteristics shared by all people.” Douglas McGregor (1960) formulated two theories that represent two values associated with human nature. Theory X assumes people are lazy and would avoid work if possible. Hence, only an external force can make them productive. Theory Y assumes that willingness to work is widely distributed and that people require a positive and motivating work climate to elicit the inner drive to work. Leaders with values associated with theory X will have a low opinion of people and will find it challenging to adopt the growth/external mindset that values and celebrates people. Alternatively, leaders with values aligned with theory Y will create a positive environment that motivates people to align with the growth/external mindset principles.

Emotional Intelligence

Goleman has established emotional intelligence (EI) (1998) as more important than intelligence quotient in driving efficiency in the 21st century. EI is the ability to perceive, analyze, regulate and manage one’s emotions and those of others to promote emotional and intellectual stability and growth (Bradberry & Greaves, 2009). It has four competencies (Bradberry & Greaves, 2009; Goleman, 1998): self-awareness, self-social awareness, and relationship. Engaged employees drive the sustainable competitive advantage of organizations because of their extra-role activities in a challenging environment as COVID-19. The

organizational climate created by leaders' EI affects the performance of engaged employees (Bradberry & Greaves, 2009; Goleman, 2005; Mahon et al., 2014). Thus, leaders' EI is necessary for social interactions and will affect the relational and communication components of the human relations dimension of organizational climate (Goleman et al., 2002). The purpose of a growth/external mindset is to create a positive work climate through soft skills that can drive employee productivity. Leaders with low EI cannot create such a climate. Hence, developing high EI is a way to enhance the growth/external mindset.

Core Self-Evaluation

Core self-evaluation (CSE) is a composite personality trait with the following personality traits; self-esteem, locus of control, generalized self-efficacy, and low neuroticism. It is an evaluation of an individual's self-worth which captures their self-identity. Self-esteem explains how individuals describe themselves. It is the picture the individual sees when he/she looks in a mirror. Generalized self-efficacy explains the confidence of individuals in handling situations. Locus of control describes what people ascribe as to the source of their abilities, whether internal or external. Low neuroticism describes the emotional stability of the individual. CSE guides individuals' actions in situations and motivates those actions (Bono & Colbert, 2005; Bono & Judge, 2003). CSE is seen as a socially desirable trait that enhances leadership effectiveness (Judge et al., 2009). For instance, leaders with high CSE have accurate self-assessment, are emotionally stable, and have a positive belief in their ability to perform in various situations. These will enhance the leader's desire to behave in line with the growth/external mindset.

CONCLUSION

Covid-19 has highlighted the importance of human resources in the overall performance of the organization. For example, Amah (in press) stated that in Covid-19, human leadership behaviors characterized by two-way communication, active listening, empathy, trust, and collaboration drove employee experience and superior performance. Leadership development is very important in ensuring that leaders have appropriate skills and mindsets to drive the performance of the organization, through creating an appropriate organizational climate that drives superior performance (De Clercq & Rius, 2019; Dvorak & Wigert, 2021; Gallup, 2021). The reason leaders do not practice what they learned in leadership development is because of their understanding of leadership and leadership mindset (Beer et al., 2016; Gurdjian et al., 2014). These factors are the hidden drivers of leadership behavior. Therefore, the combination of these factors gives rise to four leadership mindsets that drive different leadership behaviors. It is argued in this book chapter that for leaders to develop the leadership styles that drive superior performance, they must have a growth/external mindset. Therefore, any leadership development must begin with a proper understanding of the different leadership mindsets and the behaviors they allow.

Leadership mindsets are not permanent traits but can be developed and changed. Factors that help develop a positive mindset include values and their alignment with the human nature and dignity of the human person, leaders' emotional intelligence, and core self-evaluation. Research on the leadership mindset is still in its infancy, with several unknown issues, such as the lack of a validated measure of leadership mindset. This, however, should be the starting point for future research. How each of the identified mindsets affects leadership behavior can be confirmed through future studies.

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KEY TERMS AND DEFINITIONS

COVID: Coronavirus disease.

CSE: Core self-evaluation.

EI: Emotional intelligence.

Next Normal: Period after the coronavirus pandemic ends.

SME: Small and medium enterprises.

Chapter 13

Transformational and Authentic Leadership in Telework

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ABSTRACT

The COVID-19 era has driven virtual work models in the organisational context. Teleworking was the alternative that many organisations found to continue operating. Overnight, many employees started working from home. Leadership practices are essential in times of uncertainty and crisis. This study aims to analyse the perception of teleworking employees regarding the leadership style, specifically the transformational and authentic leaderships. The results show that transformational leadership is predominant in the teleworking context. However, when compared with other studies, teleworking employees perceive less transformational leadership behaviours and more behaviours referring to laissez-faire leadership, as well as the behaviours of transactional leadership. Teleworking employees perceive more behaviours of the authentic leadership style. This study demonstrates the need for leaders to adapt their behaviours to the new working conditions, face-to-face and virtual, to ensure leadership effectiveness.

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INTRODUCTION

The year 2020 will become known as the year of the pandemic due to COVID-19. Many are the impacts of this pandemic, not only on people but also on organizations and countries. Studies have been developed to know these impacts, namely the impact of telework on people and organizations (Almeida, 2020; Kniffin et al., 2021; Mesquita et al., 2020; Tavares et al., 2020b, 2020a; Xiao et al., 2021).

In the uncertainty and lack of knowledge about the virus, countries went through periods of confinement in which the face-to-face activity of companies was suspended, with employees working from home. This reality occurred in Portugal, from mid-March 2020, with the first state of emergency. The particularity of the Portuguese situation has to do with the fact that telework did not have a great expression in the corporate culture until then. In 2015, only 11% of Portuguese employees were teleworking (Eurofound and the International Labour Office, 2017). With the COVID-19 pandemic, without much experience or adequate technology, most Portuguese companies managed to adapt and continue working by keeping their employees at home. It was a big challenge for employers and leaders who became separated from their teams at such a difficult and uncertain time.

Despite the limited literature on leadership effectiveness in the virtual work context (Bartsch et al., 2021), it is undisputable that the role of leadership is key in communicating and managing change processes. Before the pandemic, there was already concern in understanding how leadership works in virtual teams, as it was already a reality with an increasing trend (Liao, 2017). Organizations must develop their change and management strategies and leadership style to survive (Hirlak & Kara, 2018). For researchers, there must continue to be studies on the connections between development and effectiveness, organisations, and outcomes, and between leaders and followers (McCleskey, 2014).

During and in the post-pandemic time, it is observed that there is a need for studies on leadership styles in virtual organizations (Batırlık et al., 2022). With more flexible working methods, “a traditional or no leadership can result in some risks” (Contreras et al., 2020, 1). Leaders and managers need to make company structures more flexible and develop new skills to establish a strong and reliable relationship with their employees, maintaining their competitiveness and a genuine concern for their well-being (Contreras et al., 2020). In addition to leadership competences, because trust is considered the fundamental basis of relationship-oriented leadership structures, some researchers have explored the leadership styles (situational, authentic, servant-oriented, and transformational) during uncertainty that best sustain trusting relationships. “Developing and maintaining leader trust in circumstances such as a pandemic is a dynamic process, changing over time from pre-existing trust, to trust based on actions, to trust in the strength of the authentic relationship” (Ahern & Loh, 2021, 268). The study of leadership styles further highlights the importance of targeted leadership development to increase the effectiveness of educational technology in the higher education sector (Lalani et al., 2021).

Through studies carried out during the pandemic, it is possible to see that COVID-19 seriously impacted organizational leadership and more, “leaders need good communication skills to share true information with empathy and optimism and leaders need to be thoughtful and capable to handle change in uncertain situations ethically” (Chen & Sriphon, 2021, 1). With COVID-19, the importance of crisis leadership for organizations also grows, despite the weak existing research on this topic. Some researchers have sought to develop a crisis leadership model through the lessons of the pandemic. They concluded that ‘crisis leadership is multifaceted and requires an all-encompassing effort and provides a road map for organizations looking to develop crisis leadership capabilities for senior managers and leaders’ (Balasubramanian & Fernandes, 2022).

During the COVID-19 pandemic, leaders faced major challenges with employees who were teleworking and in a context of great uncertainty. There are leadership styles that are better suited than others in uncertain contexts. “Transformational leadership is positively related to innovative behavior only when psychological empowerment is high, whereas transactional leadership has a negative relationship with innovative behavior only under these conditions” (Pieterse et al., 2010). These approaches are the most widely used for the study of leadership in uncertain and changing times, finding several studies using both styles (Banks et al., 2016; Hoch et al., 2018; Yavuz, 2019; Zhu et al., 2011). Hence, they are assumed to be the approaches that are best suited in change contexts. In face-to-face environments, transformational leadership is recognised as relevant by team members, but in virtual environments there is no such relationship (Balthazard et al., 2009). “If leaders lead in a transformational manner instead, possibly even together with other leaders at the same time, the leadership of virtual teams can be successful” (Zeuge et al., 2020).

In an uncertain context, the motivation, engagement, health, and well-being of an organization’s employees largely depend on the leader’s behaviors. It is necessary to develop skills and behaviors to engage and protect the health and well-being of teams. Research shows that transformational leadership and authentic leadership can help hone positive psychological skills and positive attitudes in leaders and their followers. (Yavuz, 2019). Transformational leadership promotes change in organizations and when an organization faces high frequency of changes, transformational leadership style is best suited (Busari et al., 2020). Thus, Bass and Avolio’s model, which allows the study of transformational, transactional and laissez-faire leaderships (Avolio et al., 1999; Bass, 1997; Bass et al., 2003; Bass & Avolio, 1993), and the model of authentic leadership (F. Walumbwa et al., 2008) are used to study the impacts of leadership styles on teleworking. Thus, the purpose of this research is to identify the perception of teleworking employees on the leader’s behaviour during the COVID19 pandemic, comparing the results with previous studies that used the same models.

LITERATURE REVIEW

Telework in Portugal

The concept of teleworking was coined by Jack Nilles in the 1970s, when the USA was going through an oil crisis. Thus, to seek solutions to reduce energy consumption and the problems associated with traffic, it was intended that, instead of employees going to work, the work would go to the employees (Allen et al., 2015).

Various terms are found to refer to teleworking, such as telecommuting, remote working and home-working (Junior & Silva, 2015). In Europe, it is more frequent the use of the term ‘telework’, while in the United States, it is more common to use telecommuting (Junior & Silva, 2015). According to some researchers, the concepts of telework and remote work are not identical, which makes it necessary to define each term, as well as the characteristics that distinguish them (Gozdziewska-Nowicka et al., 2020). Thus, these two concepts should not be used interchangeably. Regarding the term remote work, researchers reveal that it is more difficult to find definitions in the literature. Remote work should be considered temporary or the least formalized possible, and what distinguishes it from telework is precisely the fact that it does not need to be regulated in the employment contract, and a verbal agreement is enough for the employee to perform his or her work duties at home (Gozdziewska-Nowicka et al., 2020).

Although there is no consensus on the definition of telework, there are many definitions in the literature (Belzunegui-Eraso & Erro-Garcés, 2020; Gozdziwska-Nowicka et al., 2020). The telework can be described as a modality of work and/or provision of services performed remotely through information and communication technologies (ICTs), in any location outside the employer's premises (Belzunegui-Eraso & Erro-Garcés, 2020; Rocha & Amador, 2018). Telework is "an alternative work arrangement in which employees perform tasks elsewhere that are normally done in a primary or central workplace, for at least some portion of their work schedule, using electronic media to interact with others inside and outside the organization" (Gajendran & Harrison, 2007, 1525). Similarly, telework is seen as a work practice carried out outside the organisation and mainly at home, and which can range from a few hours a week to full-time, resorting to the use of technologies so that employees can perform their tasks and interact with other people (Allen et al., 2015). In another definition, telework is characterised using communication technologies in business travel and may also include paid work at home, satellite offices, telework centres or other locations outside the organisation for at least one day a week (Martin & MacDonnell, 2012). Telework can be conceptualized as a form of work and/or provision of services performed remotely by means of information and communication technologies and in a location outside the employer's premises. It can be done in multiple locations, using various technological means and with different frequency (Belzunegui-Eraso & Erro-Garcés, 2020).

Telework may have the following modalities: home-based work, that is, the work is carried out at the employee's home; work in satellite offices means that employees perform their functions in scattered units of a parent company; work in telecenters means that the work is performed in offices usually installed near the residence of the worker and that may be used by employees of several companies. Telework can be developed in a mobile modality (outside the residence and the main work centre) and can also be mixed, in which an agreement is made between the employer and the employee so that the latter can spend a few hours outside the company (Rocha & Amador, 2018). This study has chosen to follow the telework, according to Belzunegui-Eraso & Erro-Garcés (2020), in which employees perform their tasks remotely with the use of information and communication technologies, whether part-time or full-time.

Regarding the advantages of teleworking, these can be associated with increased employee productivity, increased quality of contact with customers, improved work-life balance, lower real estate expenses, reduced traffic congestion, air pollution and energy use. In addition, it can create employment opportunities and attract applicants (Eurofound and the International Labour Office, 2017; Ye, 2012). On the other hand, companies also face some difficulties when it comes to supervising and managing employees, the sense of isolation felt by employees, inefficient collaboration due to employees being far away, and increased security risks (Ye, 2012).

Before the pandemic, a study was conducted to understand the potential of telework in Portugal and the results show that how telework is perceived by the participants is in line with what is known in the literature, and that the attitudes towards telework (productivity/quality of life at work and cost reduction) are predictors of the intention to accept offers in this regime (Babú, 2017). With the pandemic scenario, the need arose to analyze its effect on emotional exhaustion and performance, as there was still significant evidence of these connections (Almeida, 2020). The results show that, although leading to increased work overload, teleworking decreases emotional exhaustion and increases performance (Almeida, 2020). Before the pandemic, a study shows that extraversion, openness, agreeableness, and conscientiousness are positively correlated with job satisfaction in the telework (Smith et al., 2018).

An international study conducted during the pandemic identified four main challenges of remote work (work-home interference, ineffective communication, procrastination, and loneliness), as well as

four characteristics of virtual work that affected the experience of these challenges (social support, work autonomy, monitoring, and workload) and one key individual difference factor (employee self-discipline) (B. Wang et al., 2021). Another study showed that teleworking triggered greater work-related fatigue, which worsened perceptions of work-life balance. “Work engagement lessens the perceptions of work-life unbalance. The increased work-related fatigue triggered by remote working may produce a physical and emotional exhaustion of home-based teleworkers (Palumbo, 2020). These results are important when aiming to study leadership in virtual contexts. Despite the conceptual differences between telework and remote work, both concepts will be considered in this research.

Leadership Styles and Telework

The 21st century accelerated globalization and the digital transformation of organizations with a strong impact on work and the tools used, thus enhancing flexible work models, such as telework. This already existed in certain areas for a small number of employees, but with the pandemic everything changed in Portugal (Eurofound and the International Labour Office, 2017; Mesquita et al., 2020). Telework became a reality and with strong prospects of continuing to be an option for several business areas.

Telework and its impacts on the organisational context, particularly at the level of leadership, had been previously studied. In view its complexity, researchers have sought to integrate more positive forms of leadership in their studies (Avolio et al., 2009), promoting the integration of leadership theories (Avolio, 2007). There are several researchers who present the components of authentic leadership theory and the comparison with the theories of charismatic and transformational leadership, servant leadership and spiritual leadership (Avolio, 2010; Avolio & Gardner, 2005). Some researchers also refer to the issue of the universality of behaviours, competences, or leadership styles (Bass, 1997; Hamlin, 2004; House & Aditya, 1997). Avolio, Bass and Jung go further and even state that one of the major weaknesses of research has been caused by limitations in terms of generalising the results to other organisations (Avolio, 1999).

The current relevance of studying leadership in virtual environments, particularly due to the pandemic, is reinforced. It had previously been studied by several authors, but for other reasons (Antonakis et al., 2003; House & Aditya, 1997; Purvanova & Bono, 2009). Although for reasons strictly related to technological development, the concerns of these authors focused on the potential change that technology was causing in the existing knowledge about leadership in situations where electronic communication prevailed within virtual teams. In this context, some research on virtual leadership and the term ‘e-leadership’ emerged, heading new research projects in leadership (Avolio et al., 2000; Avolio & Kahai, 2002; Van Wart et al., 2019). The first results of these works state that transformational and participative leadership behaviours show high importance in teams that work and relate to their leaders through technological means. Then, there is an inability to produce an operational definition of e-leadership, encompassing telework, team and business settings and an awareness that leader competences in virtual environments are different (Van Wart et al., 2019). Another study conducted in the pandemic phase shows that task- and relationship-oriented leadership behaviour was necessary to maintain employees’ performance in a virtual environment and work-related stress did not affect their job performance (Bartsch et al., 2021). On the other hand, “trust, communal relationships, social exchange relationships, and leadership in an organization are an interesting issue, particularly in the COVID-19 time, since the role of leaders is very crucial for maintaining organizational sustainability” (Chen & Sriphon, 2021, 1).

Purvanova & Bono investigated e-leadership with a focus on transformational leadership, by comparing virtual teams with teams in which the leader communicates face-to-face with its members. This meant

to analyse the consistency of behaviour by the leader in the various environments he/she is faced with, as well as to observe the transformational leadership behaviours that are more or less evident in virtual contexts, compared to face-to-face work (Purvanova & Bono, 2009). Leadership practices cannot be the same, since, to become effective and sustainable, they must adapt to the new demands of remote work (Bouziri et al., 2020; Lambert et al., 2020). It had already been discussed that leadership in virtual environments should not only be an extension of traditional leadership but should imply fundamental changes in the relationship between leaders and followers, as well as with other stakeholders involved, what they called a silent revolution (Avolio & Kahai, 2003). Other researchers support the same idea and suggest that it is imperative that leaders change their practices (Malhotra et al., 2007). A recent study mentions the skills that leaders need to develop in virtual contexts - “(1) leaders need good communication skills to share true information with empathy and optimism and (2) leaders need to be thoughtful and capable to handle change in uncertain situations ethically” (Chen & Sriphon, 2021). Based on Bass and Avolio’s transformational leadership model (Avolio & Bass, 2004), it is also possible to study transactional and laissez-faire leadership styles. The first research hypothesis of this study arises.

H1: There are differences in the components of transformational, transactional, and laissez-faire leadership on teleworking.

According to Purvanova & Bono (2009), it is assumed that the focus on transformational leadership is justified by the amount of literature and the relevance of theory in the study of virtual teams (Avolio et al., 2000; Bell & Kozlowski, 2002). However, this relevance does not translate into the existence of a solid body of knowledge on virtual environments, since the empirical literature on them reveals a certain youthfulness that lacks deepening, especially in the logic of analysing separately the various components of transformational leadership. In this article, it is considered that it is in the most difficult moments, of unexpected crises and without ‘instruction manuals’, that some leadership styles may assert themselves and make a difference in the survival of organisations. The careers of individuals and the destinies of organisations are determined by the effectiveness of leaders’ behaviours (Lussier & Achua, 2016).

Telework presupposes an organisational culture based on greater flexibility and on greater support from the leaders. According to the followers’ perceptions, “authentic leadership partially mediates the positive relationship between flexibility-oriented organizational cultures and employees’ job satisfaction” (Azanza et al., 2013, 45). Authentic leadership approach also assumes great importance in the current reality. In addition to the fact that transformational leadership is positively related to innovative behaviour when psychological empowerment is high (Pieterse et al., 2010), more recently, a study has shown that paternalistic, authentic and democratic leaderships are the most effective in supporting the implementation of innovative processes in organisations (Sacavém et al., 2019).

In these times of uncertainty and insecurity, leadership becomes even more vital for organisations, and it is essential to understand its role in the performance of employees who are working at home (Dirani et al., 2020; Li et al., 2020a, 2020b). Some researchers suggest that authentic leadership is positively associated with employee engagement and performance (Daraba et al., 2021), and with authentic leadership also being envisioned as a way to maintain and cultivate employee performance during organizational crisis environments (Lyubovnikova et al., 2017; Wang et al., 2014; Wong & Laschinger, 2013). Indeed, the multidimensional development of authentic leadership has shown to be consistent in performance, satisfaction, and the prediction of positive attitudes in employees (Walumbwa et al., 2008; Walumbwa et al., 2010; Wang & Hsieh, 2013; Wang et al., 2014; Wirawan et al., 2020). Following these researchers, it is important to understand if authentic leaders emerge in the current context, i.e., more supportive, fair,

transparent and ethical leaders, who respond favourably to the demands and anxieties of teleworking employees. As such, another research hypothesis of this study arises.

H2: There are differences in the components of authentic leadership on teleworking.

The concept of authentic leadership emerges more comprehensive and considering the assumptions of positive psychology. In it, the leader uses and promotes the positive psychological skills and the positive ethical climate within the organisation through moral guidance, relational transparency, self-awareness and balanced information processing, thus promoting positive self-development (Walumbwa et al., 2008, 2011). Following this concept, this leadership style has been shown to promote the psychological capital and creativity of the followers (Rego et al., 2012) and the organisational environment itself may have an impact on the happiness of the followers (Rego & Cunha, 2008). Through this evidence, it is considered imperative to further investigate these two leadership approaches in such an unusual context as experienced with the COVID-19 pandemic. In the next section of the literature review, the models and theoretical assumptions of transformational and authentic leadership theories will be further explored.

Transformational and Authentic Leadership

To study the period experienced during the COVID-19 pandemic, transformational and authentic leadership theories are integrated. This integration trend is used by several researchers. In the search for a more humane leadership and organisation, Dimitrov (2015) conducted the first case study on the concept of 'Humane Leadership'. This concept already presupposes the need for integration of various leadership theories. "Humane leaders can be fostered and encouraged in parallel with the transformation of a workplace culture into a human organisation" (Dimitrov, 2015, 139). The researcher explored how leadership influences an organisation to become humane through its traits and behaviours. The study concluded that the traits and behaviours of some modern leadership theories such as authentic leadership, transformational leadership and charismatic leadership were combined under the concept of humane leadership, as they are similar.

The paradigm of transactional and transformational leadership is considered by Bass as universal, because the same conception of the phenomenon and relationships can be seen in several organisations and cultures, with few exceptions, "The transactional-transformational paradigm views leadership as either a matter of contingent reinforcement of followers by a transactional leader or the moving of followers beyond their self-interests for the good of the group, organization, or society by a transformational leader" (Bass, 1997). Bass and Avolio's model comprised transformational and transactional leadership. After successive evolutions, the dimensions from transformational to *laissez-faire*/passive were discriminated. For this study, the analysis of transformational, transactional, and *laissez-faire* leaderships follows, in order to understand the possible changes due to the fact that leaders and followers are teleworking. Moreover, according to some researchers, "transformational and transactional leadership are so highly related that it makes it difficult to separate their unique effects" (Judge & Piccolo, 2004, 765).

Transformational leaders integrate creative insight, persistence and energy, intuition, and sensitivity to the needs of others to 'forge the strategy-culture alloy' for their organizations (Bass & Avolio, 1993). The Multifactor Leadership Questionnaire (MLQ) Handbook presents transformational leadership as characterised by 5 components (Avolio & Bass, 2004). Idealised Influence through Attributes refers to the attribution of charisma to the leader, while Idealised Influence through Behaviours emphasises a collective sense of mission and values. This leadership style thus presents other interrelated components - Inspirational Motivation, Intellectual Stimulation, and Individualized Consideration. In contrast,

transactional leaders are characterized by contingent reward and management-by-exception styles of leadership; transactional leaders develop exchanges or agreements with their followers, pointing out what the followers will receive if they do something right as well as wrong (Bass & Avolio, 1993). According to these researchers, transformational and transactional leadership, besides being distinct, are complementary, and the leader may use both simultaneously and in different situations. *Laissez-faire* or passive leadership is considered by researchers as absent leadership, “leaders avoid accepting their responsibilities, are absent when needed, fail to follow up requests for assistance, and resist expressing their views on important issues” (Bass, 1997, 134). Table 1 shows the definitions of the components of transformational, transactional, and *laissez-faire* leadership.

Table 1. Components of transformational, transactional, and laissez-faire leaderships

Component	Definitions
- Transformational	Leadership
Charisma or Idealized influence	These leaders are admired, respected, and trusted. Followers identify with and want to emulate their leaders. Among the things the leader does to earn credit with followers is to consider followers’ needs over his or her own needs. The leader shares risks with followers and is consistent in conduct with underlying ethics, principles, and values.
Inspirational motivation	Leaders behave in ways that motivate those around them by providing meaning and challenge to their followers’ work. Individual and team spirit is aroused. Enthusiasm and optimism are displayed. The leader encourages followers to envision attractive future states, which they can ultimately envision for themselves.
Intellectual stimulation	Leaders stimulate their followers’ effort to be innovative and creative by questioning assumptions, reframing problems, and approaching old situations in new ways. There is no ridicule or public criticism of individual members’ mistakes. New ideas and creative solutions to problems are solicited from followers, who are included in the process of addressing problems and finding solutions.
Individualized consideration	Leaders pay attention to each individual’s need for achievement and growth by acting as a coach or mentor. Followers are developed to successively higher levels of potential. New learning opportunities are created along with a supportive climate in which to grow. Individual differences in terms of needs and desires are recognized.
- Transactional	Leadership
Contingent Reward	Leaders engage in a constructive path-goal transaction of reward for performance. They clarify expectations, exchange promises and resources for support of the leaders, arrange mutually satisfactory agreements, negotiate for resources, exchange assistance for effort, and provide commendations for successful follower performance.
Active Management by Exception	Leader monitor followers’ performance and take corrective action if deviations from standards occur. They enforce rules to avoid mistakes.
- Laissez-faire	Leadership
Passive Management by Exception	Leaders fail to intervene until problems become serious. They wait to take action until mistakes are brought to their attention.
Laissez-Faire	Leaders avoid accepting their responsibilities, are absent when needed, fail to follow up requests for assistance, and resist expressing their views on important issues.

Source: Bass, 1997; Bass et al., 2003.

The theory of transformational leadership is supported through the MLQ, created by the authors, and validated (Judge & Piccolo, 2004). Over the years, results have shown that the components of Transformational Leadership have a high correlation (0.5 to 0.8) between each of them and a lower

correlation with Transactional Leadership (0.3 to 0.5) (Bass, 1997). As to leadership outcomes, the optimal leadership profile is characterised by low frequencies of *Laissez-Faire*, followed by a greater use of the Transactional Leadership style and, finally, a greater demonstration of the components of the Transformational Leadership style (Gomes & Cruz, 2007, 154).

Some critics consider transformational leadership unethical, so Bass and Steidlmeier, already influenced by the authenticity current, present the four components of authentic transformational leadership: “the moral character of the leaders and their concerns for self and others; the ethical values embedded in the leaders’ vision, articulation, and program, which followers can embrace or reject; and, the morality of the processes of social ethical choices and action in which the leaders and followers engage and collectively pursue” (Bass & Steidlmeier, 1999, 181). These researchers suggest the existence of pseudo-transformational leaders and authentic transformational leaders (Avolio et al., 2009). The term authenticity is used “to ground their approach involves someone ‘owning’ their experiences and acting in accordance with these inner thoughts and feelings” (Avolio & Gardner, 2005; Day, 2011).

Luthans and Avolio define the authentic leadership as a process drawn from positive psychological capacities and a developed organisational context, which results in greater self-awareness and positive self-regulated behaviour by leaders and followers, fostering a positive self-development (Luthans & Avolio, 2003). Authentic leadership is defined as “a pattern of leader behavior that draws upon and promotes both positive psychological capacities and a positive ethical climate, to foster greater self-awareness, an internalized moral perspective, balanced processing of information, and relational transparency on the part of leaders working with followers, fostering positive self-development” (Walumbwa et al., 2008, 94). As such, authentic leadership is seen as “a process that draws from both positive psychological capacities and a highly developed organizational context, which results in both greater self-awareness and self-regulated positive behaviors on the part of leaders and associates, fostering positive self-development” (Avolio et al., 2009, 424). This approach presents several levels that include the leader, the follower, and the context. Authenticity is largely defined by what people see in the leader, as there is no one right way to establish and manage authenticity; there are consistent steps that help others perceive the leader as authentic - to gain a better understanding of themselves and their backgrounds and those of others and improve the connection to the organisational context (Goffee & Jones, 2005). Some researchers state that it is possible to learn from the experiences of others, but success is not achieved by trying to be like others. “People trust you when you are genuine and authentic, not a replica of someone else” (George et al., 2007, 1). In recent years, trust in the leader has been called into question. The authentic leader is seen as someone who “demonstrate a passion for their purpose, practice their values consistently, and lead with their hearts as well as their heads. They establish long-term, meaningful relationships and have the self-discipline to get results. They know who they are” (George et al., 2007, 1). Authentic leadership emerges from the life-stories of leaders that “provides followers with a major source of information on which to base their judgments about the leader’s authenticity” (Shamir & Eilam, 2005, 395).

Some researchers have sought to integrate various perspectives and definitions of authentic leadership and proposed a model focused on the components of self-awareness and self-regulation (Gardner et al., 2005). Authentic leadership emerges as a pattern of leader behaviour that promotes positive psychological skills and ethical climate to foster self-awareness, internalised moral perspective, balanced information processing and relational transparency in leaders’ work with their subordinates (Walumbwa et al., 2008). Researchers argue that the more individuals remain true to their core values, identities, preferences and emotions, the more authentic their actions become (Avolio et al., 2004). Thus, authenticity is recognised

as a developmental capacity that promotes individuals' self-awareness, accuracy and perceptions, thus enabling the alignment of behaviours with their intrinsic values (Harvey et al., 2006).

Throughout the evolution of this approach, there was agreement to consider four components of authentic leadership - "balanced processing, internalized moral perspective, relational transparency, and self-awareness" (Avolio et al., 2009; Ilies et al., 2005). The components have characteristics that help describe the leaders' behaviour and allow them to be recognised as authentic (Table 2).

Table 2. Components of authentic leadership

Component	Definitions
Self-awareness	Refers to demonstrating an understanding of how one derives and makes meaning of the world and how that meaning making process impacts the way one views himself or herself over time. It also refers to showing an understanding of one's strengths and weaknesses and the multifaceted nature of the self, which includes gaining insight into the self through exposure to others and being cognizant of one's impact on other people.
Balanced processing	Refers to leaders who show that they objectively analyze all relevant data before coming to a decision. Such leaders also solicit views that challenge their deeply held positions.
Internalized moral perspective	Refers to an internalized and integrated form of self-regulation. This sort of self-regulation is guided by internal moral standards and values versus group, organizational, and societal pressures, and it results in expressed decision making and behaviour that is consistent with these internalized values.
Relational transparency	Refers to presenting one's authentic self (as opposed to a fake or distorted self) to others. Such behaviour promotes trust through disclosures that involve openly sharing information and expressions of one's true thoughts and feelings while trying to minimize displays of inappropriate emotions.

Source: Walumbwa et al., 2008

These components were operationally defined by Walumbwa, Avolio, Gardner, Wernsing, & Peterson (2008) through the Authentic Leadership Questionnaire (ALQ). Authentic leadership becomes a latent construct in which the four components allow representing the concept (Walumbwa et al., 2010) and which, given the empirical evidence (Walumbwa et al., 2008) and Kernis' conceptualisation of authentic leadership (Kernis, 2003; Kernis et al., 2005), can be treated as a global construct represented by these components.

Authentic leadership has grown in terms of research in the last decade, but leadership construction deserves more research (Avolio et al., 2018). There is research in other areas, such as sport (Bandura & Kavussanu, 2018; Bezaire, 2020), in addition to business. A return to the principles of authenticity is thus noted (Crawford et al., 2019). In the organisational context, one finds a conceptual model that integrates authentic leadership/ followership theory with theory and research on high-performance human resource practices (HPHRP). "Authentic leadership, through various influencing processes, promotes HPHRP, and vice versa, to help foster enhanced work engagement" (Karam et al., 2017, 103). Through engagement, individuals are motivated to show their best and most authentic version of themselves in the workplace, hence there is a greater likelihood of better performances and high levels of well-being.

Recently, researchers have studied the theories of authentic leadership and transformational leadership together, highlighting their importance, namely the practical implications of positive organizational psychology (Yavuz, 2019). The results reveal that the relationship between authentic and transformational leadership is large, with authentic leadership having a smaller relative weight than transformational leadership for the outcomes of follower satisfaction, follower satisfaction with the leader, task perfor-

mance, and leader effectiveness, and demonstrating a dominance over transformational leadership in predicting group or organizational performance and organizational citizenship behaviors (Banks et al., 2016). The researchers further recommend examining the components of authentic leadership and its ethical constructs to differentiate it from transformational leadership. Transformational and authentic leadership share a conceptual overlap, with authentic leadership sometimes described as a subset of transformational leadership (Walumbwa et al., 2008). Both put followers first, creating relationships of trust and support for development. Although there is this conceptual overlap between the two types of leadership, the models also have distinct components. The first is self-awareness, that is, in authentic leadership there is a deeply rooted sense of identity grounded in internal values. That identity and those values are passed on to followers, through an internalised moral perspective and self-regulation, which results in lasting relationships (Ilies et al., 2005; Walumbwa et al., 2008). While both transformational and authentic leaders consider the needs of their followers, authentic leaders lead with purpose and with consideration for the perspective and values of their followers, and therefore exhibit high levels of self-regulation (Avolio & Gardner, 2005; Walumbwa et al., 2008). As for the development of followers, although both leaders are concerned about this, they express it differently. Transformational leaders are concerned with transforming followers and authentic leaders promote authenticity, developing lasting relationships and seeking to influence followers to become authentic (Gardner et al., 2005; Luthans & Avolio, 2003). Authentic leaders influence others through transparency, leading by example, dedication, beliefs, and values. Transformational leaders, on the other hand, influence through their character, inspirational vision, stimulating ideas and concern for followers' achievement. The ethical/moral component is the distinguishing element of authenticity (Avolio & Gardner, 2005; Gardner et al., 2005). As the authentic leadership approach is more recent, it was the study by Walumbwa et al. (2008) that examined the validity of this construct in comparison to transformational leadership. In the various studies conducted by these authors in different countries, they found a positive relationship between authentic leadership and positive leadership. Following the findings of the previous authors in business environments, the last hypothesis of this research seeks to verify the relationship between these leadership styles when employees are teleworking.

H3: Authentic Leadership is positively related to transformational leadership on teleworking

METHODOLOGY

The study follows a quantitative and cross-sectional research methodology. The purpose of the research is to identify the perceptions of individuals in teleworking regarding the leader's behaviours, i.e., regarding the perceived leadership style. The research strategy adopted is by questionnaire (Yin, 2009).

Sample and Data Collection Technique

The sample consists of 344 individuals working in virtual environments in several companies belonging to different sectors in Portugal. The chosen data collection technique is the questionnaire and, considering the issue, we opted for an instrument already used in Portugal and therefore, already tested and recognised. The instrument includes 2 parts: i) Participant Profile; and ii) Perceived Leadership Style. The first part of the questionnaire presents the sociodemographic data and, in the second, the two questionnaires. The first questionnaire is called Multifactor Leadership Questionnaire (MLQ), created by Avolio

& Bass (2004). The MLQ presents the components of transformational, transactional, and *laissez-faire* leaderships. The questionnaire has been examined and updated and over the past 35 years has evolved based on various investigations of leaders in public and private organisations (Antonakis et al., 2003). The version used is MLQ 5X *SHORT* which consists of 45 statements and the rating scale used is the Likert scale from 0 to 4, where 0 means Never, 1 means Rarely, 2 means Sometimes, 3 means Often and 4 means Often, if not always. The second questionnaire is the Authentic Leadership Questionnaire (ALQ), created by Avolio, Griffith, Wernsing, & Walumbwa (2010) and Walumbwa, Avolio, Gardner, Wernsing, & Peterson (2008), and revised by Avolio et al. (2018). The researchers sought to develop a questionnaire based on the multidimensional theory of authentic leadership. The four components are Transparency, Self-awareness, Balanced Processing and Moral/Ethical. The ALQ consists of 16 statements and the rating scale used is the Likert scale from 0 to 4, where 0 means Never, 1 means Rarely, 2 means Sometimes, 3 means Often and 4 means Often, if not always.

For the present research, the questionnaire was made available in online format. Descriptive statistical analyses were performed (mean and standard deviation) and correlation. Pearson's Correlation Coefficient was used for the correlation analysis. This coefficient ranges between 0 and 1, and can be interpreted, according to Mukaka (2012)), according to the following values: 0 to 0.3 negligible correlation; 0.31 to 0.5 weak correlation; 0.51 to 0.7 moderate correlation; 0.71 to 0.9 strong correlation and >0.9 very strong correlation. All statistical analyses were performed using the Software Package for Social Sciences (SPSS), version 25.

ANALYSIS AND DISCUSSION OF RESULTS

The sample is made up of 344 individuals teleworking or working remotely from various companies belonging to different sectors: - Industry (10.2%); - Wholesale and retail trade and repair of motor vehicles and motorbikes (3.8%); - Consulting, scientific, technical and similar activities (14%); - Administrative and support service activities (3.5%); - Education (21.5%); - Human health and social support activities (10.2%); and, Other service activities (36.9%). The average age of the sample is 44 years, with 39% of the individuals between 40 and 49 years, 30% between 20 and 39 years and around 22% between 50 and 59 years. Most individuals do not hold management positions (52.9%), approximately 28.5% are Middle Managers (28.5%) and 18.6% are Directors. Approximately 80% of the participants have an academic qualification higher than a Bachelor's degree.

Cronbach Alphas

The reliability analysis allows verifying the internal consistency of the scales of the variables under study. Following the methodology of Gomes, Simões, Morais, & Resende (2021), Cronbach's alpha coefficient was applied to each dimension separately, considering ranges between 0 and 1. According to Pestana & Gageiro, (2014), a coefficient value equal to or greater than 0.7 is considered acceptable. The results of this study are compared with previous studies that used the MLQ (Avolio & Bass, 2004; Bass et al., 2003) and ALQ (Rego et al., 2016).

Table 3 shows that, in all scales, Cronbach's Alpha shows good or very good internal consistency (higher than 0.86) in the MLQ and ALQ components. It should also be noted that the authentic leadership components have higher levels of internal consistency (higher than 0.95).

Transformational and Authentic Leadership in Telework

Table 3. Cronbach alphas

MLQ	Bass et al., 2003	N= 344
Transformational Leadership	0.96	0.860
Transactional Leadership	0.86	0.866
<i>Laissez-faire</i> Leadership	0.89	0.905
ALQ	Rego, Lopes, Nascimento, 2016	N=344
Self-awareness	0.86	0.965
Balanced processing	0.78	0.966
Internalized moral perspective	0.85	0.965
Relational transparency	0.82	0.970
Authentic Leadership (global)	0.94	0.951

Descriptive Statistic

Descriptive statistics are used to analyze the components of leadership styles, more specifically the mean (M) and standard deviation (SD), comparing them with the results obtained in previous studies. Regarding the MLQ, the statistics from the questionnaire manual - Avolio & Bass, (2004) - are used as a reference, and the ALQ is based on the results of a study previously carried out in Portugal - Rego, Lopes, Nascimento (2016).

Table 4 shows a clear reduction in most of the weights of the transformational and transactional leadership components on teleworking. Contrary, there is an increase in the weightings of the *laissez-faire* leadership components and the transactional leadership component concerning the monitoring of performances and the implementation of corrective measures by the leaders - Management by Exception Active.

Table 4. Descriptive statistic – MLQ

Scale	Normative Sample: MLQ 5X scores - Avolio & Bass, 2004			Total Sample (N=344)		
	M	SD	Range	Me	SD	Range
Transformational Leadership				2.39	0.88	
Idealized Influence (Attributed)	2.94	0.76	4.00	2.46	0.96	4.00
Idealized Influence (Behavior)	2.77	0.72	4.00	2.17	0.86	4.00
Inspirational Motivation	2.92	0.76	4.00	2.66	0.99	4.00
Intellectual Stimulation	2.78	0.71	4.00	2.43	0.94	4.00
Individualized Consideration	2.85	0.78	4.00	2.25	1.05	4.00
Transactional Leadership				2.14	0.72	
Contingent Reward	2.87	0.7	4.00	2.29	0.92	4.00
Management by Exception Active	1.67	0.88	4.00	1.99	0.81	4.00
<i>Laissez-faire</i> Leadership				1.34	0.67	
Passive Exception Management	1.03	0.75	4.00	1.52	0.73	4.00
<i>Laissez-faire</i>	0.65	0.67	4.00	1.16	0.82	4.00

Regarding to H1, Regarding H1, differences were found in the transformational, transactional and laissez-faire leadership components in telework. Employees perceived less transformational leadership behaviours and more behaviours related to laissez-faire leadership (absence of leadership), as well as the behaviours of transactional leadership related to the control and monitoring of tasks and the consequent implementation of corrective actions by the leader.

Despite the reduction in the perception of the behaviours of the transformational leader by the teleworking employees, transformational leadership ($M=2.39$) is the predominant style. The component that stands out within this style is Inspirational Motivation ($M=2.66$) which scores higher than transformational leadership overall, as does Idealized Influence (Attributed) ($M=2.46$) and Intellectual Stimulation ($M=2.43$). The study shows the perception of inspirational leadership, in which leaders can inspire and motivate team members, promoting individual and team spirit through their enthusiasm and optimism. It is also verified that the Idealized Influence or Charisma is an important component as it is referred to in the model. Employees in teleworking perceive the influence and power of the leader more by their attributes, more specifically, the impact of the vision, mission and values. Finally, intellectual stimulation is also perceived, i.e., the ability of leaders to stimulate others to be innovative and creative in the search for new approaches and solutions for the organisation. These components are complementary and contribute to the effectiveness of the transformational leader.

The results of the questionnaire are in line with the findings of the authors (Avolio & Bass, 2004). The perception of the most effective leader is the one who scores highest on the components of transformational leadership, then on the Contingent Reward component ($M=2.29$) and Management by Exception Active ($M=1.99$) and only then Management by Exception Passive ($M=1.52$) and, lastly, *Laissez-Faire* ($M=1.16$). Nevertheless, these results draw attention to what some researchers have mentioned as a risk in flexible working models: the perception of traditional leadership and non-leadership (Contreras et al., 2020). The optimal leadership profile presents low levels of *laissez-faire* leadership (Gomes & Cruz, 2007). However, these results show a growing perception of lack of leadership on teleworking.

Regarding authentic leadership and its components, it was found that employees on teleworking perceived these behaviours more (Table 5). The scores of all components are significantly higher than in the previous study (Rego, Lopes, Nascimento, 2016). The moral and ethical perspective continues to be the predominant component ($M=2.45$), i.e., teleworking employees perceived the existence of behaviors consistent with the internal moral standards and values on the part of the leader. The remaining components of authentic leadership show similar values between them; employees perceived the behaviors referring to the leaders' self-awareness and their impact on others, their objective analysis of data before decision making and the transparency shown through the open sharing of thoughts and emotions.

Table 5. Descriptive statistic – ALQ

Scale	Rego, Lopes, & Nascimento, 2016 Total Sample (N=309)			Total Sample (N=344)		
	Mean	SD	Range	Mean	SD	Range
Authentic Leadership	1.75	0.67		2.38	0.98	
Self-awareness	1.76	0.79	4.00	2.35	1.06	4.00
Balanced processing	1.68	0.79	4.00	2.36	1.07	4.00
Internalized moral perspective	1.89	0.79	4.00	2.45	1.07	4.00
Relational transparency	1.68	0.65	4.00	2.37	1.01	4.00

As for the research hypothesis H2, there are no differences in the components of authentic leadership in the context of teleworking, only a greater perception of these behaviours by the leader.

Correlations

To perform this analysis, as the number of observations is greater than 30, Pearson's correlation coefficient is used and the significance level; if it shows a value lower than 0.05, indicates the existence of a linear correlation, thus an association between the variables (Mukaka, 2012). According to the type of variables, this analysis is justified for the MLQ and ALQ variables because they are quantitative variables. The correlation analysis is shown in Table 6.

The level of significance shows that the components that constitute Transformational Leadership show a high positive correlation with each other. According to Bass' assumptions (Bass, 1997), that the components of Transformational Leadership show a high correlation between 0.5 and 0.8, this assumption is true on teleworking. According to the same author, the Contingent Reward, despite being a component of Transactional Leadership, shows a moderate correlation between 0.3 and 0.5 in relation to the components of Transformational Leadership, a practically null correlation with Passive Management by Exception and a moderately negative correlation with Laissez-Faire Leadership. This situation does not occur in this research, as there is a high correlation (0.7 and 0.8) of the Contingent Reward component of Transactional Leadership with the Transformational Leadership components. The Management by Exception Active component shows a moderate correlation, as mentioned by the author (Bass, 1997). As for the components of *laissez-faire* leadership, there are practically null or moderately negative correlations regarding the components of transformational and transactional leadership, following the model.

By analysing the components of the MLQ and ALQ, there is a high positive correlation (0.91) between authentic leadership and transformational leadership and its components, a moderately positive correlation with transactional leadership and a moderately negative correlation with laissez-faire leadership. Thus, research hypothesis H3 is considered validated.

Regarding authentic leadership and its components, it was found that employees on teleworking perceived more the behaviours of this leadership style. The scores of all sub-dimensions of authentic leadership are higher than in the previous study (Rego, Pereira Lopes, & Nascimento, 2016). The moral and ethical perspective continues to be the predominant component (2.45), i.e., teleworking employees perceived the existence of behaviours consistent with internal moral standards and values on the part of the leader. The remaining components of authentic leadership show similar values between them; employees perceived the behaviours referring to the leaders' self-awareness and their impact on others, their objective analysis of data before making decisions and the transparency shown through the open sharing of thoughts and emotions.

The results of leadership styles on teleworking follow the assumptions of the authors (Avolio & Bass, 2004; Avolio et al., 2010, 2018; Walumbwa et al., 2008), both in the analysis of correlations and in the scores of each leadership style and its components. According to Avolio and Bass (2004), the transformational leadership style shows a higher value, followed by transactional leadership and with a lower value laissez-faire leadership. The data collected show the same pattern, in which the transformational leadership style has the highest predominance, despite a decrease compared to previous studies. This study thus contradicts the idea that there is no relationship between the predominance of transformational leadership in virtual environments, as there is in face-to-face environments (Balthazard et al., 2009).

As for the behaviours associated with laissez-faire leadership, employees on teleworking perceive more of these behaviours, with a significant increase in this leadership style and its components. There is even greater perception of the absence of leadership, according to the data collected, corroborating with the researchers' concerns (Contreras et al., 2020).

Table 6. Correlations

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
1. Idealized Influence (Attributed)	(0.864)																
2. Idealized Influence (Behavior)	0.806**	(0.866)															
3. Inspirational Motivation	0.835**	0.757**	(0.865)														
4. Intellectual Stimulation	0.829**	0.776**	0.792**														
5. Individualized Consideration	0.865**	0.773**	0.810**	0.861**	(0.866)												
6. Transformational Leadership	0.942**	0.887**	0.913**	0.925**	0.939**	(0.860)											
7. Contingent Reward	0.815**	0.775**	0.800**	0.816**	0.809**	0.872**	(0.864)										
8. Management by Exception Active	0.423**	0.429**	0.398**	0.426**	0.360**	0.440**	0.417**	(0.882)									
9. Transactional Leadership	0.749**	0.728**	0.727**	0.752**	0.711**	0.795**	0.863**	0.819**	(0.866)								
10. Management by Exception Passive	-0.409**	-0.273**	-0.367**	-0.398**	-0.433**	-0.411**	-0.321**	-0.037	-0.223**	(0.899)							
11. Laissez-faire	-0.021	0.024	-0.029	-0.126*	-0.074	-0.051	0.008	0.191**	0.111*	0.514**	(0.918)						
12. Laissez-faire Leadership	-0.261**	-0.153**	-0.239**	-0.310**	-0.304**	-0.278**	-0.191**	0.081	-0.076	0.886**	0.853**	(0.905)					
13. Self-awareness	0.836**	0.756**	0.787**	0.812**	0.836**	0.875**	0.786**	0.367**	0.701**	-0.426**	-0.082	-0.304**	(0.965)				
14. Balanced processing	0.802**	0.736**	0.756**	0.811**	0.802**	0.849**	0.752**	0.369**	0.680**	-0.380**	-0.053	-0.260**	0.868**	(0.966)			
15. Internalized moral perspective	0.816**	0.787**	0.763**	0.795**	0.811**	0.862**	0.761**	0.426**	0.718**	-0.411**	-0.069	-0.288**	0.829**	0.844**	(0.965)		
16. Relational transparency	0.798**	0.691**	0.730**	0.736**	0.757**	0.807**	0.733**	0.419**	0.696**	-0.408**	-0.064	-0.283**	0.806**	0.791**	0.837**	(0.970)	
17. Authentic Leadership	0.871**	0.796**	0.813**	0.845**	0.859**	0.909**	0.812**	0.423**	0.748**	-0.435**	-0.072	-0.304**	0.938**	0.939**	0.940**	0.917**	(0.951)

Note: Cronbach's alphas are reported on the diagonal; * $p < 0.05$; ** $p < 0.01$

Within the components of transformational leadership, Inspirational Motivation is the one with the highest score, followed by Charisma, expressed through Idealised Influence through Attributes, and Intellectual Stimulation. From the employees' perception, the leadership style reflects the different ways that the leader uses to motivate and encourage his/her followers towards new visionary and attractive challenges (Avolio & Bass, 2004). The difference between the leader's influence through their attributes and their behaviours is also highlighted, as employees perceive the leader's influence more through their charisma.

Analysing the authentic leadership style, the results obtained follow the trend of the previous study (Rego et al., 2016), not highlighting significant changes by employees who are on teleworking.

This research sought to know the perception of transformational and authentic leadership styles in a pandemic context in which organizations mostly resorted to teleworking. These results reinforce the idea of researchers who use both styles in times of uncertainty and change, (Banks et al., 2016; Hoch et al., 2018; Yavuz, 2019; Zhu et al., 2011). Even in virtual environments, transformational and authentic leadership styles are the most used by leaders in times of uncertainty and change.

CONCLUSIONS AND IMPLICATIONS

Flexible working models are a future trend in an increasingly global and digital world. The COVID-19 era has reinforced virtual working environments. The telework has led to major changes, especially in Portugal. These transformations are not only in the functioning of the organisations, but also, and mainly, in the relationships between employees and their bosses and employers.

Leadership practices must necessarily be different and must adapt to the new working conditions, face to face and virtual. Through this adaptation is it possible to continue to ensure effective leadership. With the trend towards permanence of these flexible working models, it is urgent that leaders adapt and develop specific skills for these working contexts. The pandemic context motivated by COVID-19 brings great challenges to the leaders of organisations, not only by the need to develop these skills and prepare the organisations, but also by the reformulation of their objectives, adapting them to virtual working environments with greater flexibility. The great challenge for organisations is to reconcile the different working models in a harmonious way.

This study contributed to a greater awareness on the part of leaders about the perception of employees who are teleworking, regarding their behaviour and attitudes. This greater awareness will lead to a correct adaptation of leadership styles, whenever team members are in virtual working environments. Maintaining the same leadership style is inappropriate and the risk of the perception of absence of leadership calls into question the effectiveness of the leader and the success of the organization.

Implications for Theory

This study opens the door to further exploring the topic of leadership styles and practices in more flexible and virtual working environments. There are clearly different aspects that leaders need to consider in their day-to-day work. The same style and practices do not produce the same result in different working models and contexts.

In theoretical terms, leadership development should increasingly consider these working models. It is important to generate more knowledge about the behaviours and skills that leaders need to develop to ensure leadership effectiveness in virtual working environments.

Finally, with team members in virtual environments, the leader's communication is crucial. Communication science can make a strong contribution with more innovative and effective forms of communication that are better suited to the digital context.

Implications for Practice

From a practical perspective, leaders understand the advantages of adopting a leadership style that strengthens relationships and trust between members of teams that are in virtual working environments. In this way, knowledge is increased about the effects of the leader's behaviours and communication on the team's work.

Increased awareness of the demands of working with virtual teams leads to a search for more dynamic ways to maintain links between team members and enable more fluid and effective communication (formal and informal).

These findings help human resource management departments define potential challenges and difficulties in the COVID-19 era. From the moment that virtual work is adopted by organizations, the rela-

tionship between employee and employer is increasingly relevant. Thus, leadership styles and employee perception will be vital for both organizations and employees.

LIMITATIONS AND RECOMMENDATIONS FOR FUTURE STUDIES

In addition to other business issues, one of the most urgent aspects that the COVID-19 pandemic has brought to organisational dynamics is the need to deepen the knowledge of leadership in contexts where people and teams work remotely. In fact, the vast existing literature does not clearly show how leaders should act in the coordination of virtual teams. Although it seems to us that this study has made some contribution to the nebulous practices of virtual leadership, especially in some clarification of the need for transformational leaders, but also in indicating the emergence of *laissez-faire* leadership (or lack of leadership), it essentially leads us to recommend the deepening of these topics in further studies. In this context, we point out some limitations to this study with subsequent recommendations for improvement, particularly at the methodological level and even in the research design.

In the methodology, we focus on the need to obtain a larger sample of subjects, which would allow for more representative data to be obtained. This richness of sampling will also facilitate the comparison between certain professional groups, such as people in leadership positions versus people who only develop subordinate work, whose limitation in the present study may be biasing some of the results obtained.

Another limitation that seems relevant to us in our study is related to the fact that the sample consists only of teleworkers, whose results were compared with professionals who worked in face-to-face jobs, but in studies conducted previously. Although the theoretical support and the measurement instruments of this study show robustness, this temporal distance between the data obtained in the context of face-to-face work and teleworking, deserves a recommendation that studies be carried out comparing these two working arrangements over the same time.

In terms of research design and because the need to study the topic of virtual leadership should be emphasised, we propose the possibility of further developing new study formats. More than descriptive studies, it should be necessary to deepen correlational and even causal studies. The operationalization of experimental or quasi-experimental studies, or even longitudinal studies, although difficult, may boost a better understanding of the phenomenon of leadership in teleworking contexts. The case study methodology discussed by Yin (1989, 1994) may also provide important inputs to the topic. The in-depth and comparative analysis of organisations whose professionals carry out their work face-to-face with others that do it by teleworking will allow the profiles of competences and behaviours of leaders to be adjusted to the different contexts of the respective teams.

Finally, and with a view to linking globalisation and teleworking, we recommend that further studies could be carried out between countries to analyse virtual leadership at the level of different national cultures. This will allow leaders to develop intercultural competences in global environments.

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KEY TERMS AND DEFINITIONS

Authentic Leadership: Is a leadership style based on the genuine aspects of the leader and, through the honest relationships he establishes with followers, intends to go beyond his own interests.

Leader: Is someone who has the ability to influence, share and inspire their vision on others; others live and feel this vision as their own.

Leadership: Is the ability to influence, inspire and motivate others in order to achieve the mission and goals.

Telework: Refers to work that is performed outside the workplace using information technologies.

Transformational Leadership: Is a leadership style in which the leader inspires and collaborates with followers to promote positive change.

Chapter 14

COVID-19 and Its Impact on the Psychological Contract of Employers and Employees

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ABSTRACT

COVID-19 has disturbed employment relationships. Twenty employers and 20 employees were interviewed to gain early insights into how the pandemic affected their psychological contract. Results suggested that both parties had divergent expectations of what each party should expect in the current scenario, and both reported intense, often negative, emotions about their current state. While no specific breaches of explicit promises were reported, employees reported violation of implicit beliefs relating to their needs for security. In addition, both parties' expectations differed about their future PC. Employees expected a deal that considers needs for security whereas employers emphasized business continuity by minimizing costs. Such incongruent current and future obligations between the parties suggest trust will be required to negotiate the employment relationship through the crisis. HRM practitioners will have a definite role to play by providing and initiating arrangements that will reconcile both parties' needs to ensure stable employment relationships for mutual benefits.

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INTRODUCTION

The World Health Organization (WHO) declared the outbreak of the COVID-19 pandemic on 12th March 2020. By June 2020, around the same time of this study, WHO reported over 8 million confirmed cases and over 435,000 deaths. In just a few weeks, the pandemic spread in almost all countries around the world creating huge damage to the global socio-economic infrastructure and forcing people to change their working styles, habits and employment prospects, almost overnight. Most countries were forced into full or partial lockdowns and gradually sought very cautious re-openings amid the fear of subsequent waves. Indeed, COVID-19 has been a case illustrating the fragility of a number of businesses. While the literature on business continuity affirms for back-up plans and protocols to weather catastrophes, experience has now shown that this has not always been the case with some major firms having to file for bankruptcy and laying off thousands of workers. The essence of business continuity aimed at value presentation, continuity of operations and recovery advantage (Herbane et al., 2004) were far from ideal indicating the lack of preparedness of many organizations in such instances (see e.g. Rezaei Soufi et al., 2019). This is the context in which our study took place, and specifically assesses the quality of the ‘employment relationship’ through the lens of the psychological contract (hereafter PC), in these very extreme conditions. We assumed the pandemic to represent a trigger of major change and our point of departure is that such changes inevitably shake the PC. The findings from a study like this are relevant to researchers and practitioners alike. To researchers they indicate whether phenomenal theories can be upheld in extreme conditions and whether we may need to review some of those theories to take account of major variances, thus refining our earlier understanding. To practitioners it provides insights on what better practices they can introduce to support the entities and their employees from mutually unnecessary harm. This attempt is also in line with the increasing calls to narrow the researcher-practitioner divide (Aguinis et al., 2020; Gill, 2018).

The aim of this study is therefore to provide a snapshot of how a global catastrophe, like COVID-19, has impacted PCs in these exceptional circumstances and what this means to both our understanding of the PC and also to the way HRM practitioners may best handle it. More specifically, we evaluated the state of the current PC, the participants’ emotional states given the situation reflecting their employment relationship and the way the parties construe the new employment relationship in a post COVID-19 working environment. We did this by capturing both employee *and* employer perceptions in a period of unprecedented major change. We document current beliefs and expectations about the future and in doing so, we offer an early understanding of how COVID-19 has impacted PCs and how it may shape its later unfolding.

THE CONTEXT UNDER STUDY

An appreciation of the context helps us to capture factors that are either new or unexpected (Johns, 2018). Context is also a boundary feature of theory and theory is best placed within a set of defined parameters conditioned by context. For example Bacharach (1989) remarks about the need to evaluate the use of theory within its defined time and space and this implies that our general understanding of the dynamics underlying the PC in these momentous circumstances may need fine tuning to help us understand what is going on in the process. The current context has placed an unprecedentedly high level of stress on businesses, employers and employees alike. Certain aspects that are critical to the survival of this business

relationship have been threatened and the COVID-19 situation has given rise to major contextual and employment changes. These include the way teams and employees have had to maintain contact, the shift to virtual meetings, the challenging and troubling times to maintain employment and deal effectively with future concerns, issues arising from IT security as businesses moved to more telework practices, and maintaining ongoing relationships with customers. These changes were massive, and quick.

We assess people's perceptions and feelings within *this* context and chose the PC to examine this because there is wide acceptance that the PC is a means to help us appreciate the state of the employment relationship (Coyle-Shapiro, 2004). Indeed, the literature shows that the PC provides us with an understanding of how people dynamics change and have significant impacts on salient outcomes including attitudes to work and behaviours (Coyle-Shapiro et al., 2019; Conway & Briner, 2009).

VIEWS UNDERLYING THE PSYCHOLOGICAL CONTRACT

The term 'psychological contract' (PC) can be accredited to the works of Argyris, (1960), Levinson et al., (1962) and later Rousseau (1989). There have been several debates since then on the way the concept has evolved (see e.g. Roehling, 1997; Lester, 2001; Conway & Briner, 2009) and it is no secret that there have been multiple views, sometimes contradictory to each other and seemingly unclear (Guest, 1998), that have shaped the way we understand and measure the PC in current research. In this study we specifically adopt Rousseau and Schalk's (2000, p. 284) definition of the PC, that is an "individual's interpretation of an exchange of promises, that is mutually agreed on and voluntarily made between two or more parties". This definition implies that the exchange arrangement is between *two* parties where each *perceives* mutual agreement, though there may not be *actual* agreement. We specifically chose this definition because it captures broad elements that qualify the PC in this study.

In our study, we utilize three theoretical positions to inform our understanding about the PC: social exchange theory (Blau, 1964), psychological needs (Levinson et al., 1962) and the PC as a cognitive schema (Rousseau, 1995, 2011). Rather than considering these as separate perspectives (e.g. Coyle-Shapiro et al., 2019) we view them as representing broad qualities of the PC. Our point of departure, similar to most researchers in the field, is to view the PC as a dynamic and evolving phenomenon that takes shape as a function of the interactions and exchanges that happen between employers and employees and which are constantly re-calibrated to fit in with one's acceptance of the terms defining the employment relationship (Griep & Cooper, 2019). This constant revision has the purposeful goal to ensure that underlying needs are satisfied throughout the course of time.

More specifically, social exchange theory (Blau, 1964) holds that people exchange objects and resources within a set framework that is mutually agreed. This exchange defines a sense of reciprocity (Gouldner, 1960) which determines the level of trust between the parties involved and guarantees the anticipated future state of the relationship. In the employment relation, these exchanges include the different obligations and inducements, often implicitly agreed, that maintains the relationship going and that provides a degree of anticipation to future exchanges. While most studies have examined the PC from a one-party perspective (namely employees), it is paramount to evaluate both parties to appreciate how the PC actually takes shape and is therefore likely to change in the future. Organizations *per se* may not have a PC (Rousseau, 2011) but their agents, which include superiors and managers, do as they represent and uphold the organization's interests and maintenance. In addition, this relationship is construed mentally (Rousseau, 1995) and thus we emphasize that this sense of mutuality exists as part of

our cognitive framework which determines how we organize our content structure underlying the terms of the relationship. Therefore, the PC is strongly imbedded in our memory system partly by what we attend to, and partly by what we value (Rousseau, 2011). Because of our inability to process information completely and given the limitations of our memory, we tend to emphasize elements of the PC that have intrinsic and immediate salience to us (Rousseau, 1995). We emphasize those aspects more, compared to all the bundle of inducements we may formally expect in the relationship. These cognitive schemas, which determine our ongoing transactions with the other parties represent specific needs that we have and that we need to satisfy in dynamic relationships. Rousseau (2003) affirms this and she sees much scope into reconciling psychological needs to better understand the formation and maintenance of cognitive schemas that determine the dynamics of the employment relationship. Meckler, Drake and Levinson (2003) note that “an understanding of the psychological contract is inadequate if it is not grounded in the theory of psychological needs” (p. 128), and the PC should be understood as a process through which parties’ underlying needs are fulfilled (Meckler et al., 2003). These needs are covert whose fulfilments are manifested through a variety of emotions.

Our approach in this study is to evaluate the extent that employer and employee PCs coincide by tapping into their personal experience of COVID-19 in their employment life and decipher the underlying emotions that may shed light on their employment needs in these unprecedented circumstances. In view of these perspectives, our main research question is “How do employees and employers construe the PC in the context of COVID-19?”

COVID-19: A FORCE OF UNPRECEDENTED MAJOR CHANGE AND THE PSYCHOLOGICAL CONTRACT

The pandemic can be considered as an external major force of change on organizations akin to what Thompson and Hunt (1996) label as a gamma change. Gamma changes force people to redefine their reality to the extent that it is no longer comparable with the previous state. In other words, for an organization to regain some degree of stability would require massive adjustments. Gamma changes require a complete transformation in one’s cognitive beliefs. These beliefs may not be at par with existing values and may consequently be stressful moments until such beliefs are accepted into the new cognitive structures of organizational members (Thompson & Hunt, 1996). This is in very much in line with explanations focused on change and PC dynamics (e.g. Rousseau & Wade Benzoni, 1995; Coyle-Shapiro & Conway, 2004) even though previous studies have never foreseen a shock on the scale of COVID-19. COVID-19 caused immense uncertainty with some organizations considering downsize operations, layingoff staff, and requiring adaptive and proactive behaviors by employees to enable survival and adequate organizational functioning. From a PC perspective, Rousseau (1995) refers to a process of ‘contract reframing’ where schemata that define the exchange in the employment relationship requires redefining. This can often also result in schema mismatches (Morrison & Robinson, 1997; Frese, Schalk & Croon, 2011) and raise insecurity and serious doubts about the future (Morrison, 1994). Given that PCs also fulfil each party’s psychological needs, the pandemic can be considered forceful enough to thwart these needs and therefore one would naturally expect significant damages to the employment relationship.

PC adjustment under major change appears to go through a process of gradual re-interpretation (Saunders & Thornhill, 2006; Dulac et al., 2008). It is well accepted that emotions have a central role in understanding organizational life (Brief & Weiss, 2002) and are very relevant to the PC. Distorting

the perceived exchange relationship may trigger a sense of cognitive dissonance which manifests itself into emotional reactions. Tomprou et al., (2015) have argued that following violation, victims seek to establish a PC that restores some predictability by reactivating the pre-violation PC, or depart from the previous contract and form a new PC. Moreover, this is consistent with how people react to negative events which generally lead to heightened attributional states for explaining unexpected negative events (e.g. loss of salary, loss of job, etc.) (Taylor, 1991) in an attempt to re-establish some form of 'control' (Kiefer & Antoni, 2019). In situations where the uncertainty is prolonged, this may take much longer than desired to regain a level of trust. Therefore, the PC is a suitable framework to understand how employers and employees react and/or adapt to COVID-19.

METHOD

Sample and Interview Schedule

We conducted a number of qualitative in-depth interviews approximately five weeks after the first pandemic lockdown measures were installed. We interviewed 20 employees, mostly skilled knowledge workers, and 20 employer representatives (senior managers) from a variety of organizations in Malta and Poland. These organizations came from several sectors including banking, education, automotive, entertainment, manufacturing, public service, and consultancy. They were all hit hard by the pandemic at the time of the interviews with whole teams being relocated to work from their homes and also in constant consideration of redundancies to curb on increasing costs coupled with the sudden loss of productivity levels.

Purposive and snowball sampling was used to recruit participants. Given the sensitivity of the period, full consent was sought from those who willingly accepted to be interviewed. All participants were employed at the time of the study, with some working on reduced hours or reduced pay, and the majority working remotely. Where possible, an employee and employer representative were drawn from each organization but this was not always the case.

An interview schedule was developed for the purpose of this study which was shared and discussed with all the research team members to ensure that the questions were well understood by all, given the possible cultural differences that may influence meaning and interpretation. Moreover, the schedule was piloted to ensure no internal question ambiguities or redundancies. The interviews sought to cover three areas: the current expected reciprocal behaviors of the parties, the current emotional states of each party, and each party's expectations of their future PC.

Procedures and Analyses

The interviews were conducted using video conferencing and lasted between 30 and 45 minutes. Transcripts were thematically analyzed as described by King (1998). Saturation of the major themes occurred at approximately 10 interviews for both employers and employees. A thematic code was developed based on the individual readings of specific transcripts and in line with the aims of the study. Transcript notes and thematic codes were shared and discussed among the different research members to ensure a degree of consistency and understanding before excerpts were lifted to reflect the salient aspects of the interviews.

RESULTS

Table 1 summarises the salient results of all 40 interviews organized around the main themes underlying the current expected behaviours, the emotions expressing the current scenario and perceptions of the elements characterising the new PC. We present the results in the order of our main research objectives namely the current expected behaviors between the parties, the expressed emotions associated to these expectations and the anticipated expectations that may shape the future PC.

Table 1. The Present Impact of the COVID-19 Pandemic on the Employment Relationship through the lens of the Psychological contract

Employees' Perspectives		Quote examples from Employees	Employers' Perspectives	Quote examples from Employers
Expected behaviours between parties during pandemic	- Leadership qualities leads to more effort and collaboration - Mutual trust and respect - The crisis is a test of the employer's trustworthiness - Employee resistance - Employment relationships are strained in teleworking	This is a test primarily for employers - let's see how decently they treat employees	- Leadership quality leads to more effort and collaboration - Mutual trust and respect - The crisis is a test of the employees' trustworthiness - Inadequate information to share with employees - Mutual impact of pandemic	- It's a challenge not having the right information at hand to share with employees - For those who endure this period and stay in the company, honour and respect will come first. In the future, these people will stand out
Expressed Emotions as a manifestation of the implicit violation	- Anger - Calmness - Fear - Frustration - Helplessness - Uncertainty - Confusion - Commitment - Enthusiasm - Instability - Loneliness - Positive Surprise - Sadness - Spite - Surprise	- I am surprised it is happening so fast and it concerns large global players - Anger because we expect more to be done	- Anger - Calmness - Fear - Frustration - Helplessness - Uncertainty - Anxiety - Additional Pressures - Compassion - Interests - Tension - Weakness	- I'm afraid that I won't be able to retain employees anymore - I am in constant tension and frustration - I'm afraid of the future
Anticipated PCs for post-pandemic (post-violation)	- Need to innovate - Talent management attraction and retention - Teleworking as the new norm - A change in communication methods - Adaptability - Available resources - Employees to be more acknowledged and valued - Leadership challenges - Less opportunities for promotion - Technological literalism - Time Management - Work with market expectations	- It triggers many innovations - it was invented in my on-line training team - Working from home will prevent many people from getting promoted - It teaches us that we are able to adapt to the new working and thinking mode	- Need to be innovative to pick up - Promotion of teleworking infrastructure - Talent management and retention challenges - Cost effective measures - Cost reduction on space - Employee preparedness for similar situations - Job insecurity and the increased value of work - Less bargaining space for re-negotiations - Smarter approaches to work	- Employers will realize that they can minimize their costs by encouraging people to work from their home - Human resources are far more available now because bargaining power has been reduced - People are discovering working smarter and using tools that we already had and never used! - They will definitely change, but I don't know what will happen, what conditions will be created for entrepreneurs by Government

Expected Behaviours between the Parties

Both parties reported that the pandemic had tried and tested many company leaders' ability to steer the organization through the crisis while emphasizing the need to maintain a high level of reciprocal trust and respect. This created instances of ambivalent motivations which on the one hand represent the need to safeguard the interests of the firm while on the other end conveying a sense of responsibility for one's employees' livelihood. As one employee and one employer respectively stated:

In a crisis, leadership is important - how the leader behaves will determine how employees respond.

COVID-19 and Its Impact on the Psychological Contract of Employers and Employees

It is important to treat employees well from the very first beginning. When employers treat well their employees, in similar situations, they do not question their employer of what will happen to them - an issue of trust.

Another insisted that leader direction was paramount at this moment in time:

I noticed huge changes. We have been told for years that we have VUCA times - now it is mega VUCA with an emphasis on uncertainty. Until now, we have based on previous experience but now there is nothing to refer to.

Similarly, employers attempted to provide a sense of direction to their employees to maintain ‘normality’ within their possible limits. One employer remarked that:

All people in my team are mobilized, engaged, work continuity is maintained, and there is a sense of comfort, optimism and support.

Others suggested finding alternatives or shedding excess work procedures to remain afloat:

I acted in such a way that I tried to find alternative jobs for my employees.

I stopped overtime, there should be two shifts and they work for one. I lost many contracts. I am trying to diversify the risk and invest in medium-sized contracts, although large ones would give me a large margin.

The respondents reported a heightened scrutiny and vigilance of each others’ behavior putting into question the strain on mutual trust and respect. Employees noted that the sudden enforced changes due to the pandemic had threatened their job security and resources and possibly strained their relationship with the employer. This situation placed one’s party view about the other on the line as both parties struggled to understand better the meaning of ‘working with one another’. One employee, for instance, remarked that:

You have a job and all of a sudden you get terminated; this surely changes that relation; however, this is something that all the world is experiencing so I won’t blame my employer for what is happening.

Similarly, one employer said that the employment relationship will definitely change and possibly get worse:

They will definitely change, but I don’t know what will happen, what conditions will be created for us entrepreneurs. My employees don’t want to quit, neither do I want it because then both sides have a problem. In a month’s time, they will have to look for another job.

The changes requested by employers for employees to be flexible were met, naturally, with some employee resistance as well as hope that employers would manage effectively their employees’ futures. On their part, employers perceived this period as placing inevitable damage on the employment relationship in the long term.

Many employees were deeply concerned how new work practices would work out for them:

My perception of work has definitely changed. It seems that companies were / are not prepared to deal with pandemics and have no experience how to keep employment going in a very unstable situation like this crisis - we need to learn from this.

Working on-line seems to be much more time consuming. It contributes to a limited amount of leisure time and more fatigue. However, after we get use to the IT tools provided for us, we should be able to have a good work-life balance, I think.

Employers, on the other hand, were concerned about organizational survival and therefore could not offer reassurances about job security:

My fears are how to maintain a balance between giving employees a sense of security and maintaining a business - which is more important?

I will need to change some of the contracts with my staff; already changes have been introduced with some staff.

Yes, in fact we reduced the working hours. There! I still have a lot of uncertainty and we are doing our best to keep all our employees.

Employers were also deeply worried about the possibility of perceived lack of communication on the part of employees but still found it to be a daunting task in view of the high uncertainty and knowing full well that employees may see it as a growing concern which could, in turn, trigger additional erosion in the level of mutual trust:

Communication intended to keep everyone well informed is a huge challenge.

Communication right now for me is key; In fact we are also communicating with our employees our financial situation to keep everyone updated. We need to remain transparent as not to lose trust.

We badly need authentic, fast and frequent communication and being honest in communicating the real condition of the company.

By and large there was a mixed baggage of exchanges mostly exacerbated by the high level of uncertainty. Employees were struggling to retain their current employment and hence trying hastily, but not easily, to adapt while employers were struggling to juggle on the one hand the survival of the firm but on the other hand trying hard to maintain a healthy working relationship with their employees and avoiding the breakdown of trust, knowing full well what this would mean in the medium to long term on their business.

Expressed Emotions as a Manifestation of Implicit Violation

Both employees and employers expressed both positive and negative emotions as a result of the impact of the pandemic on their working lives. The negative emotions experienced by employees were related to uncertainty in taking appropriate decisions and having to deal with decreasing book orders from clients:

We are doing our best although we are living in uncertainty although we might even not get paid.

Fear was mentioned by the majority of the employees; they were afraid of losing specific job benefits like reduction in salary and also the lack of resources to complete the tasks and the job itself. Employees were also afraid that employers may take sudden rash and non-rational decisions.

I'm afraid that in a few weeks no one will work even on duty.

Other negative emotions expressed by employees during the pandemic was a huge sense of helplessness and frustration. One interviewee stated:

I feel helpless; I have no influence on this situation.

Employees also expressed anger and sadness coupled with a sense of confusion and spite for not always being told what is happening. Although employees could not point to specific broken written or verbal promises, they nonetheless reported a profound sense of violation of their implicit beliefs about deeply felt needs for security. Moreover, some also reported feeling lonely while working from home and expressed depressive and other somatic symptoms (e.g. lack of sleep, headaches, etc.). However, employees also expressed some positive emotions like surprise (e.g. the speed it took to switch the entire company to remote work), commitment, enthusiasm (given the ability to cope and manage in such a difficult situation) and a sense of relief from the support by colleagues and business partners because of this extraordinary situation. For example, one respondent stated that:

[...] we all acted above the competition because we have the same problem.

Employers, likewise, also expressed anxiety and fears associated with the future of the business (e.g. possible bankruptcy) and the inability to recoup given the uncertainties and unknowns associated to the pandemic:

I'm afraid of falling sales, lower revenues, restructuring and layoffs.

I am in constant tension and frustration. I'm afraid of the future.

However, they also showed a sense of compassion and empathy for their employees especially in those cases where it was difficult to maintain their employment. For some employers this unexpected and crisis situation acted as eustress and resilience. It motivated them to survive, to look forward to a better future with one respondent exclaiming that:

There is no time for [negative] emotions. I studied what was happening around me, analyzed the new patterns and adapted to them accordingly. I started to think about strategies to move forward.

This situation was also surprising as employers were not expecting this and they could not plan such a scenario:

This is a new situation. We have had various crisis scenarios developed over the years, but no scenario has ever assumed zero revenue during the month.

Employers also observed how people bonded better and both employees and employer representatives were more likely to be cooperative. As one of the respondents observed:

This situation will strengthen the team, the 'plus' experience with COVID 19 is that we have more trust in each other, we can rely on each other.

Nevertheless, it was also difficult for employers to keep up people's morale for such a long time without facing the reality. Employers' emotional reactions indicated that while they were aware of being scrutinized they were uneasy about communicating what the future may hold. Thus, communication seemed to be an important theme throughout the interviews surfacing as a means of keeping relations although, as noticed by one employer:

Being at office made it easier to communicate and solve issues rather than being stuck in front of the PC.

The different and ambivalent reactions captured through the interviews possibly serve both parties by motivating them to be more vigilant of each other's behaviour and to seek commitments in an attempt to anticipate what their future PC may look like. Overall, emotions were mixed with more negative emotions being expressed by employees compared to employer representatives possibly because of the lack of information and control employees felt over the situation.

Anticipated PCs for Post-Pandemic

Both parties' expectations about a future PC agreed on three obligatory aspects. First, there is the need to adapt fast to teleworking as the new norm (including the obligatory and commitment issues that this brings with it). Many respondents of both parties found this aspect important:

I am surprised that it was possible to switch the entire company to remote work in such a short time. I am surprised that everything works, because nobody has tested such a solution before.

Remote working from home is more efficient.

I see myself more productive at home, there is less waste of time.

Second, respondents pointed at the need to innovate and therefore commit themselves to work harder in order to exit this phase. According to our respondents this experience will provide an opportunity to

COVID-19 and Its Impact on the Psychological Contract of Employers and Employees

get closer together and accept new beliefs about the work experience. This would allow and install novel work practices as a mode to bring back a sense of 'normality'. One employer noted that:

Employees have already proven themselves of such worthiness and so future possible flexible arrangements may be more readily available by the employer.

On the other hand, employees remarked that:

Employers will appreciate more those employees who worked as a team in this situation.

This situation forced organization and self-discipline - thanks to this, such processes can be optimized.

We rely on mutual needs and understanding, everyone is transparent. I think that this experience will consolidate us, strengthen the commitment and loyalty of employees.

Third, there is the need to develop the rights skills and retain them effectively within the organization. According to one employee:

People who are able to be flexible, adapt to new technology etc. learn new skills in a short time will come out on top.

Employers remarked that this will evolve as a natural selection process whereby only those most talented and strategically useful will be retained:

The labor market will eventually return to normal because it has been abnormal for the last few years, it was the market of an employee who demanded more and more money and gave nothing from himself. This crisis situation will regulate the contract between the two parties on a realistic basis.

However, incongruences were evident where employees considered their employers obliged to provide better communication channels and better resources to execute one's job from home. Employers felt that employees will have to accept certain cost reductions, less space for renegotiating work conditions and the possibility of living with uncertainty for a long time:

No, I think the way of life will change for sure. It will take time to go back to normal especially in our business sector. Now I am finding more resources available for work because the bargaining power has stopped.

The labor market will change. The employee's market situation was abnormal.

On the other hand, employees' future thoughts were preoccupied with aspects like job security and availability of resources that may impact their quality of life. As one employee put it:

YES, I see no major changes after the pandemic except that it will become an employer's labour market once again due to the economic recession.

Overall, these results imply that the PC is gravely strained and characterized by incongruent current and future expectations, driven by each party's respective needs: security on the part of employees and business survival on the part of employers.

DISCUSSION

The COVID-19 pandemic has generated a high level of uncertainty in the employment world creating sudden raptures into the employment relationship. The event is so unprecedented that the phenomenon cannot be easily explained unilaterally by any one single set of theoretical perspectives. In our investigation we assumed a number of perspectives that may be used to interpret people's perceptions of the event though the lens of the PC: social exchange, the PC as a cognitive structure that frames the quality of the employment relationship and the underlying psychological needs within that relationship.

Our interview results suggest that re-constituting the PC for mutual benefit would require an understanding of its complexity in these tiring times by organizational members in general but in particular HRM professionals. Our respondents, employer representatives and employees alike, portrayed a high level of uncertainty triggered by the fact that the event happened relatively fast catching off-guard most businesses and impacting negatively operations. These feelings of uncertainty are partly responsible for the reported incongruent expectations between employers and employees. The interviews clearly suggest that the high uncertainty caused by the pandemic has destabilized the PC and in doing so thwarted both employee and employer needs (Meckler et al., 2003). This incongruence means that the mutuality that is important in the exchange relationship is highly absent. Mutuality, even perceived mutuality, is central for effective reciprocal agreements and therefore makes the PC effective enough to impact organizational performance (Rousseau, 2011) and ensure the stability of the employment relationship (Coyle-Shapiro & Conway, 2004). In our study, employees wanted commitments about job security and resources, which employers were unable to provide. These unmet employee needs will, according to Mecklar, Drake and Levinson (2003), lead to deteriorating PCs and possibly poor employee mental health. The process of redefining the PC (Tomprou, Rousseau & Hanen, 2015) is challenged immensely because the level of uncertainty is such that psychological contracting has been suspended. Employer reluctance to communicate and heightened vigilance by employees has further contributed to jeopardizing trust.

Being able to maintain an open communication is important for a healthy PC (Rousseau, 1995) and where possible, begin to repair trust given that lack of trust can have very serious consequences on both employees and organizations (Lewicki & Brinsfield, 2017). This is even more important in the face of the fact that the anticipated mutual expectations of both sides are diagonally opposite each other. Our interviews suggest two fundamental needs as central to a new PC as COVID-19 unfolds: *security* on the part of employees and *survival* on the part of employers. Employees recognize the need to become adaptable and innovative while employers state the need to survive by retaining the best talent at minimal costs.

The findings also highlight a disjoint between breach and violation. Previous literature proposes rather linear relations between breach and violation, with violation resulting from breach under certain conditions (Morrison & Robinson, 1997). Our research suggests that while no specific breaches were reported, violation occurred independently of breach. This is not unlikely. For example, contrary to what the extant of the literature argues, Montes and Zweig (2009) found that people still reported breaches in the absence of any discrepancy between what they were promised and what was delivered. In this instance, employees and employers experienced an extreme mix of emotions following the pandemic

with employees relatively reporting more negative emotions compared to employers. Such emotions reflect the sense of violation for implicit breaches that are not easily attributable to a mere discrepancy. Emotions like anger and fear are typical of breach reactions (Kiefer & Antoni, 2019) and arising out of the violation of taken-for-granted needs for security assumed by employees from pre-COVID-19 times.

Implications for HRM Professionals

What are the implications of these findings to employers and employees and what role will HRM practitioners play in view of these realities? In the coming months both parties will need to derive a new employment relationship that satisfies the reciprocal needs of both parties and thus ensure an effective and healthy employment relationship (Rousseau & Wade-Benzoni, 1994). The trajectory suggested here is one where employees need to invest in new ways of working at reduced levels of security while organizations cut costs. This is clearly not a relationship based on mutuality. HRM practitioners will therefore be critical to help in reconciling the two sets of needs shown by employers and employees. Indeed, these two needs (security for employees and survival for organizations) may appear diagonally opposite each other and more strongly so in a pandemic. Thus, it will be important to get back a fair understanding of the exchange relationship and HRM professionals should play a key role to help in the re-negotiation process of the PCs of the two parties as part of a post-violation episode (Tomprou et al., 2015). They should also help to safeguard the mutual interests of the two parties. This will involve finding and establishing appropriate mitigating procedures to deflate the possible resurgence of negative feelings (Parzefall, 2012) and helping to alleviate commitment and a sense of security (Uen et al., 2014). Therefore, HRM professionals should see ways to reconcile the two. In terms of security, research does not fit the stereotypical view that flexible work arrangements are always preferred to job security both prior to the pandemic (e.g. Woodman, 2019) and also during the pandemic itself (e.g. Pacheco et al., 2020). On the other hand, given the negative business sentiment elicited by the pandemic, an organization's survival is naturally put on the line. How does one bring these two strong and opposing needs closer? This requires that HRM professionals help organizations to focus on their core business activities to enhance their levels of productivity and at the same time contain costs and wastes that naturally jeopardizes work for employees. HRM professionals should also emphasize continuous learning of employees that is targeted towards both the achievement of personal and organizational growth. Providing effective mentoring and constantly supporting employees helps build trust in periods that are bleak and insecure. This has an effect on the level of engagement of employees (Biriowu & Ofurum, 2020) which requires that HRM professionals promote a sense of positive leadership and one that encourages and rewards exceptional behavior (Arakawa & Greenberg, 2007) especially in times of major turbulent and external uncertainties.

On the basis of our findings, we spell two important suggestions relevant to the way forward by HRM professionals. First, there is a need to begin a process of open and honest communication with all those hard hit and genuinely anxious by their work conditions due to the pandemic. HRM practitioners will need, through effective means of communication, to re-construe a new relationship as part of the cognitive belief structure amongst employees (Parzefall & Coyle-Shapiro, 2011). Realities of work may be different in the post-COVID-19 period and this will require a phase of new challenges and re-adaptation. Linked to this, new work practices will require new strategies to undo old practices and learn new ones (e.g. more telework). This may entail the need to re-write new forms of deals that can enhance new trust between employers and employees (Lewicki & Brinsfield, 2017). For example, people may have

been used to having ‘time at work’ as one of the obligations towards their employers; they may consider telework as a means to support organizations keep their carbon footprint down but their new obligation may be determined by a new obligation namely ‘deliverables per day’.

Pre-pandemic investigations may shed light on the efficacy of these steps forward. De Vos and Meganck (2009) indicated clearly that promoting instances that help reduce turnover, thus mitigating the need for security, such as giving emphasis to career opportunities and growth, were by and large more successful in maintaining and solidifying the exchange relationship between employer and employee compared to simply tackling the factors that could cause retention such as emphasizing the job content and providing a social atmosphere. Open communication that helps re-steer the trajectory of high talented employees in a period of major change can help re-balance some of the obligations and inducements embedded in the PC and increase the survival chances of the organization. Also, research that has investigated the purpose of HRM practices in securing managerial control to steer the exchange relationship between employer and employee has shown that soft HRM practices may indeed induce employee performance. For example, Seeck and Parzefall (2010) evaluated the role of hard HRM (based on a rational and utilitarian notion that employees are resources) against soft HRM (based on meaningful social relations construed at work between employer and employee). Their results suggested that HRM techniques based on negotiation (soft approach) rather than direct delegation (hard approach) supports the notion that employees are likely to channel their duties and accept redefinition of their roles in line with the organization’s circumstances.

Limitations and Future Research

There are of course a few limitations in the study that warrant mention. First, the study was conducted during the early phases of the pandemic and therefore views may have been influenced by the lack of future awareness. These may have changed substantially and certainly additional investigation or replication of this study should establish whether these results are upheld. A second limitation has to do with the wider business context. We pooled the responses based on whether the respondent was an employee or a representative of the employer. However, the responses hail from different countries with different social and economic realities which are susceptible to change differently in a pandemic. In fact, we posit that these macro factors could have revealed some fine distinctions as a function of the social and economic contexts and we urge further studies that take on board these external realities. Third, and last, we cannot generalize from a qualitative study and it would perhaps be useful to conduct this study with a larger and more varied sample using quantitative means to explore the generalizability of some of the claims made here.

CONCLUSION

The COVID-19 pandemic has been (and still is) a major trigger of change in the business world. Its direct and indirect effects will be felt for a long time. As employers and employees make sense of their working relationship, this would mean a number of challenges to overcome and therefore ensure that both parties derive maximum benefits from the experience. Doing so will guarantee that the employment relationship will be restored in a way to safeguard both employees and organizations’ optimal performance. HRM practitioners have a role to play in this as they can provide support to both parties

to ensure that any new norms initiated will be for mutual benefit. Considering how the parties' PC has shifted and recognizing the nature and extent of the rift will be a good starting point to reconcile and bring back a sense of business harmony.

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KEY TERMS AND DEFINITIONS

Employment Needs: Salient elements and characteristics that are present in one's employment or that one seeks to find in one's employment and which enable an employee to fulfil his/her aspirations.

Employment Relationship: The link that exists between employers and employees when an employee performs work or services under certain conditions in return for remuneration and other benefits.

Mutuality: The level of agreement in the perceived or actual sharing of commitments between two parties in a relationship.

Pandemic: The occurrence and prevalence of a contagious disease whose outbreak spreads globally.

Psychological Contract: The perceived exchange relationship of the underlying beliefs of the obligations and inducements between employer and employee.

Social Exchange: The voluntary actions of individuals that are motivated by the returns they are expected to bring and typically do in fact bring from others.

Trust: A Psychological state comprising the intention to accept vulnerability based upon positive expectations of the intension or behavior of another.

Chapter 15

The Impact of COVID-19 on the Human Resources Function for SME Owners: A South African Perspective

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ABSTRACT

ICT in SME development, especially in the human resource function, is crucial to business growth and sustainability. During COVID-19, SMEs had to very quickly migrate to more digital platforms. COVID-19 affected the business arena world-wide, small businesses included. SMEs were very hard hit by COVID-19 because of the harsh lockdowns and shut downs by governments during the pandemic. Not all businesses in South Africa were allowed to operate during some of the Levels 5 and 4 and even 3 lockdowns. As more information was being filtered during 2020 by the World Health Organization, who provided direction on the pandemic, decisions were made by governments accordingly to keep their citizens safe and at home during the lockdowns so that the over-burdened medical sectors would not collapse. This chapter explores ICTs in SMEs, ICTs utilized in SME HR function, how ICTs impacted organizations during COVID-19, and how SMEs adopted to digitization and online-training to survive in a disruptive environment like the pandemic.

1. INTRODUCTION

Technology has forced the whole world to change the way they do business. The digitalized era has raised concerns on how SME owners conduct their business. One such business function impacted on, is the human resource aspect. The importance of the human resource function within an SME and how technology and ICT's can be used to positively impact on the SME and its training and development of its staff is an important aim of the chapter. In order to remain current, survive and grow would require

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that SME's respond to the 4th industrial revolution by becoming more techno-savvy in their everyday business operations. This is often not as easy as it is made out to be, as SME's have little money and funding by banks, NGO's and governments. Since finance is one of the SME's biggest obstacles, moving onto digital platforms at an accelerated rate can become a very difficult task. The government of South Africa has a pivotal role to play to assist in the transition of South African SME's in their move over into the digital divide. The reason for this, is that SME's generate a substantial portion of a country's (Gross domestic product) GDP. SME's in SA are responsible for elevating poverty and streamlining job creation within the country's economy. The appearance of the global pandemic has taught the business leaders and management one important lesson that being, in order to remain sustainable in the era of COVID -19, small businesses have to adapt to technology at a very accelerated pace or they would have problems surviving.

The background into human resource function within SME's in SA prior to COVID-19 would be briefly outlined and discussed.

2. BACKGROUND INTO HUMAN RESOURCE FUNCTION WITHIN SME's IN SA PRIOR TO COVID-19

SME owners and managers are fluent about the importance of having a sound human resource function within their business. Ogunyomi and Bruning (2016:66) indicated that the core HRM functions include "(1) planning and recruitment, selection and induction; (2) performance management; (3) learning and development and (4) recognition and reward". Sheehan (2014) reiterates that the success of any business small, medium or large depends highly, on the management of its employees and a proper established structure within the business. If it is a formal SME business, HR policy needs to be in place that serves as a guide to both SME owners and their employees of what is expected of both parties within the business.

Mokomane (2018) argues that although HR practices in SME's in SA are done informally, a small business still encounters several challenges to the successful implementation of HRM functions. Some of these challenges include limited budgets, lack of resources and capacity, inadequate systems, poor relationships between employer and employees and lack of HR knowledge and business instability. Research conducted by Krishnan & Scullion (2017) and by Nolan & Garavan, (2016) on South African SME's reiterates that there are several reasons for the lack of implementation of HRM functions in small and medium companies. Some of the reasons identified are: (1) a lack of guidelines or procedures to assist employees in understanding and practising HRM functions; (2) lack of HRM professionals to help organisations to implement the functions effectively; (3) insufficient managerial skills; (4) lack of trained staff; (5) poor financial management; (6) a limited budget to implement functions; and (7) lack of experience, skills and competence to perform and manage HRM functions, (Krishnan & Scullion 2017 & Nolan & Garavan, 2016). Darcy, Hill, McCabe & McGovern (2014) stated that it is often the lack of financial resources, by small and medium enterprises that negatively impacts these companies to adopt some of the HRM functions. Amaral, Jorge, & Pecas (2019) argue that although it is understandable that many small and medium enterprises do not see the need or have the resources to implement ICT's within their business operations, this perception should change as SME's in SA are operating in the 4th industrial revolution and as such should be incorporating technology in their business activities.

Although SME's had to follow the company law where applicable and SA employment laws, these laws were made more stringent during the pandemic. A lot of new policies and protocols relating to

COVID, and the employee came into place and SME's also had to adhere to them, as they were mandatory to the SA business sector.

The research methodology employed in this study is highlighted below.

2. RESEARCH METHODOLOGY

The research displayed in this study is supported by a desk study methodology for collecting secondary data to establish the impact of the COVID-19 pandemic on the human resources function within SME's. The author paid specific attention to the South African perspective.

The aim of the research is to explore COVID-19 impact on SME's, with specific reference to the South African context that will be presented and solutions and recommendations argued and put forward, under the themes of COVID-19 and its effect on the HR function within SA SME's; using ICT's in SA SME's during COVID-19 and using ICT's in training and developing staff within SMEs' during COVID-19. The objective of this chapter is to explore the following important themes:

- COVID-19 and its impact on SME's
- Unpacking the importance of human resource function in SME's
- Training and development for SME's in SA
- Recommended changes to the HR function in SA SME's due to COVID-19
- Recommendations on using ICT's within SME's during COVID-19
- Recommendations on using ICT'S in training and developing staff within SME'S during COVID-19
- Future areas of research

In the discussion below COVID-19 and its impact on SME's will be explored.

4. COVID-19 AND ITS IMPACT ON SME's

COVID-19 has caused many lock-downs to be imposed by governments worldwide. These lock-downs have caused many SME's to be shut down, causing serious financial implications on the economy, and the SME's sector. In South Africa, the country has had one of the severest lock-downs, which has crippled the business sector. Tourism, the restaurant industry, travel industry entertainment industry and many others, had to close or downsize their business activities as lock-down and bans on travel had a severe impact on their business activities. During the lock-downs, businesses had to have staff work from home. Some SME's also did this so that they could continue business activities on digital platforms. The financial impact of COVID-19 was faced not just by South African SME's but SME's worldwide. Dimson et al. (2020) present the results of McKinsey survey that was conducted in August 2020, on a sample of 2200 SMEs in five European countries: France, Germany, Italy, Spain and the United Kingdom. It focussed on the assessment of the COVID-19 pandemic crisis impacts. Almost 70% of the respondents confirmed revenue decline that caused serious economic consequences in the company. More than half of the respondents expected that their entrepreneurship may be terminated in one year due to the pandemic crisis. Belanova (2020) draws attention to the critical consequences of the COVID-19 pandemic on micro,

small and medium-sized companies in Slovakia. In the analysis, the author states that almost 8.9% of the entrepreneurs in SMEs were forced to terminate their business activities during the pandemic. On the other hand, those entrepreneurs who survived and continued in their activities (57%) had difficulties with the declining demand for their products and services. In the United Kingdom studies by Albonico & Sharma (2020) indicated that economic sectors primarily affected by the COVID-19 pandemic mainly included those in construction, agriculture, transport, and logistics industry. The authors indicated that 90% of small and medium businesses have reported declining profits due to decreased sales in these sectors. In contrast, SMEs in finance, science and education, insurance are the least affected. According to a survey conducted on Canadian SME's by the Research and Market Intelligence Unit of the Business Development Bank of Canada (BDB:2020), entrepreneurs have strongly felt the impact of COVID-19. Results indicated that 90% of respondents said it had a negative impact, 3% said that COVID-19 had a positive effect, while 6% said, "it has not had an effect so far" (BDC, 2020). A survey conducted by the United Nations Development Program (UNDP:2020) for enterprises in Turkey, indicated that 96% of respondents said that the pandemic was a serious threat to the business of entrepreneurs. According to Naidoo (2021) in South Africa for many small businesses that have opened, although it was business as usual, the long months of forced closure imposed by the government during lock-down has had brutal consequences on their financial position. The SA SME's in the food industry that sell fruit and veg, meat and poultry and groceries were better off than the others as they were allowed to be opened, as they were deemed essential service providers. SME's in SA that were in the medical supply industry and those manufacturing/supplying and selling Personal Protective Equipment were also in a better position, as they were selling products directly relating to the pandemic and these goods were urgently needed by people to get better or keep safe during the COVID-19 pandemic. SME's in SA, in the medical supply industry like pharmacists, doctors, herbalists and stores manufacturing, supplying and selling Personal Protective Equipment, were not affected by COVID-19, in fact they benefited from the opportunities that arose during this time (Naidoo, 2021).

5. UNPACKING THE IMPORTANCE OF HUMAN RESOURCE FUNCTION IN SME's

Human resource management has been around for many decades and is tasked with the crucial aim of recruiting and selecting the right individual with the correct skill set for the job, making sure he or she is properly inducted and orientated within the organisation, and making sure the employee is properly incentivised to stay motivated and loyal to the firm. Employee assessment or performance evaluation, training, development, and maintaining a healthy and safe work environment for the employee is also critical to a good human resource management system. Proper policy especially within SME's that are companies, NGO's or cooperatives must be in place that govern the proper planning, implementation and control of the human resource function within the firm.

A small business has to have a well-resourced staff complement in order for it to operate efficiently and effectively. The staff are the people within the small business that carry out the necessary goals and objectives and implement the necessary strategies in place so that goods and services are produced on time for the necessary customer, as demanded within the dynamic business environment. The small business owner must have properly initiated human resource practices put in place to ensure the smooth running of the day-to-day business operations. According to Tan and Nasurdin (2011), 'HR manage-

ment practices' refer to a combination of defined practices, policies and guiding philosophies utilised by organisations to guide their HR management activities in order to remain efficient and achieve defined organisational goals. Bloom and Chatterji, (2009) indicate that the essence of staffing is to get the best employee that fits the job role and organisations should therefore be effective in meeting their staffing needs. According to Kim and Ployhart (2014), staffing is "a key human resource practice used to achieve firm performance through acquiring human capital resources". The purpose of staffing for an organisation informs the staffing policies, philosophies and activities of the organisation. According to Fadairo, Williams & Maggio (2013), the aspiration of an organisation is to utilise its staffing practices to have a quality workforce that meets current and future demands. Workforce planning has been identified as the strategic practice to achieve the goal (De Bruecker, Van den Bergh, Beliën & Demeulemeester, 2015). Workforce planning enables the organisation to meet its workforce needs constantly in accordance with its organisational demands and goals (Cotten, 2007)

Another significant purpose of staffing is employee retention. According to Mehta, Kurbetti & Dhankhar (2014), employee retention is defined as "a technique adopted by businesses to maintain an effective workforce and at the same time meet operational requirement". Allen (2008) argues that organisations' today face a difficult task of retaining their valued employees, while Das and Baruah (2013) affirm that the success of an organisation depends on its ability to retain its quality staff. According to Samuel and Chipunza (2009), employees leaving an organisation could have negative consequences for the organisation and could be very costly at the same time. Staff are the essential assets of a small business and if they are nurtured properly in terms of their training, development and properly incentivised, they would remain motivated to stay within the small business.

The staffing process is an essential part of employment within an organisation. The staffing process reveals how the staffing capability of an organisation is built. According to Venkatakrishnan (2016), the staffing process involves "manpower requirements, recruitment, selection, orientation and placement, training and development, remuneration, performance evaluation, promotion and transfer". Each element of the staffing process plays a strategic role and is significant to the success of the organisation. The nature of staffing for the SME is a management function. According to Ali (2013:38), management functions comprise "planning, organisation, leading and controlling". Oke (2016) argues that the planning, organising, leading and controlling of the staff of an organisation enables the organisation to control the quality of the workforce of the organisation'. Since staff within the organisation achieve its' goals, this represents the core essence of HR management. Kishore, Majumdar & Kiran (2012) posit that HR plays a crucial role in the performance of any organization and it is fundamental to understand how to manage HR. Urbano and Yordanova (2008) argue that the following factors influence the adoption of HR management:

- Size of an organization and the presence of an HR department. Larger SMEs with more employees are more likely to have an HR department and adopt HRM.
- Type of organization and its strategy and planning. SMEs with business plans, pursuing growth strategies and non-family businesses are more likely adopt HRM.
- Type of industry the organization is in. SMEs that are in exporting, franchising or working with larger organizations are more likely to adopt HRM.
- Decision-making style of the organization. SMEs that have progressive decision-making ideologies are more likely to adopt HRM.

- Macro-environmental factors. SMEs that are more attuned to the market and economic conditions and legal regulations are more likely to adopt HRM.
- Availability of resources. SMEs with more resources available are more likely to adopt HRM.

The above factors should be taken into account by the small business owner and their management.

The owner of a SME has to employ favourable HR practices that support his business operations and create harmony within the organisation. This can create loyal employees who will work even harder to achieve the goals and objectives of the SME. If the business is run smoothly and efficiently, it can save costs and create an atmosphere for customers that is warm and welcoming. If customers are happy, this can increase profits, so managing human resources is vital to a SME. Ray, (2014) argues that effective HRM can be a competitive advantage for SME's, because experienced and motivated employees are seen as valuable resources, which have a significant influence on the overall performance of a business.

Studies conducted by researchers also highlight the importance of HR function to SME's. These theorists studies will be briefly outlined and in the discussion. According to Bhatti, Syed, Shah & Shaikh (2012), their study concurred that due to the size and lack of resources of SMEs, many do not have formal HR departments or professionals, which results in difficulty recruiting and retaining employees.

In the discussion that follows training and development for SME's will be outlined and explored in detail. In order to have properly skilled staff, especially to understand and implement the various new technologies that SME's can use, it is important for training and development. A study conducted by Hung, Cant & Wiid (2016) indicated that their SMME owners were in agreement that HR management tasks such as analysing and classifying work; hiring and firing employees; motivating employees; training and development of employees; performance evaluation of employees; compensation and benefit allocation; developing and ensuring adherence to personnel rules were important for their business and that they required assistance with these HR tasks. The majority of the respondents also concurred that their HR is in place. Nyamubarwa and Chipunza, (2019) in their study argued that: "HR practices in SMEs tend to be informal and reactive to the needs of the firm...this state of affairs does not reflect anything wrong with the practice of HR in SME firms but rather explains the unique nature of HR practices that characterise SME firms, which are glaringly absent in larger firms." Bhorat et al. (2018) study on SMMES in South Africa has profiled SA SMME's. He states that: "The largest proportion of SMMEs function within the wholesale and retail industry (30 percent), followed by the community and social services industry (23 percent), the financial industry (14 percent) and the construction industry (11 percent). Thus, small business tends to operate within service industries. The breakdown of SMMEs to more disaggregated firm sizes reveals that more than 50 percent of own-account workers operate within the wholesale and retail sector, a proportion that decreases as the size of the SMME increases. These SMME wholesale and retail jobs are typically categorised as low-skilled occupations, for example shop salespeople, petrol attendants, street vendors, and cashiers... SMMEs have approximately three times more female owners than large businesses, although males own the majority of businesses in all cases. SMMEs also have a higher proportion of young owners. The racial profile indicates that while the majority of SMMEs are owned by Africans, the majority of large firms are owned by Whites... majority of SMME employees are employed in the formal sector, as discussed previously. Both the formal and informal sectors hire more males, although the informal sector employs fewer females than the formal sector..."

6. TRAINING AND DEVELOPMENT FOR SME'S IN SOUTH AFRICA

Training and developing staff within an SME is crucial. This section will discuss training and development for SME's with specific reference to the South African landscape. SME owners cannot run away from training and developing their staff. It is the duty and responsibility of a small business owner to motivate staff and keep them happy and productive within the workplace. Staff need to feel a part of something; they also need to feel valued. Providing incentives is one thing, the way a person feels towards his job is essential in order for him to perform his duties in an efficient and effective manner. Rabie et al. (2016) aspires to the opinion that training and skills development can be influential factors in SME sustainability, as learning can contribute to better skilled employees, who are proficient in their jobs. These employees are then more likely to perform with increased effectiveness, be more encouraged and feel more valued, thereby assuming greater accountability.

South African SME's acknowledge training as a means of staying relevant and profitable (Ramukumba, 2014). SME owners need to consider the four managerial tasks of planning, organising, leading and control when engaging in training. The White Paper (1995) on SME's emphasises the following in terms of training and skills development (Department of Trade and Industry, DTI, 2016):

- Provision of training in entrepreneurship, skills and management;
- Improvement of the labour environment; and
- Encouraging networking to build skills.

Grobler, Wörnich, Carrel, Elbert & Hatfield (2006) state that there are at least nine reasons that induce managers and the government to develop people. This also applies to SME's. The reasons are as follows:

- Employees may perform below the required minimum standards because of the lack of the necessary skills. Such employees need training to improve their performance.
- Technological changes and innovations in the production of goods and the rendering of services require a continuous update of skills.
- The ever-changing legal, technical and social environments influence the manner in which managers and professionals execute their daily tasks. The skills and knowledge of people who do not adapt to the changes become obsolete.
- Organisations employ new employees daily. The newly employed and/or promoted employees do not always have the skills needed to perform their new duties. This necessitates the need for training.
- Education and Training Development (ETD) is needed for succession planning. Employees have to undergo training to learn new skills that will enable them to perform their tasks and to fill open vacancies in the organisations.
- ETD enhances personal growth and organisational effectiveness.
- ETD plays a significant role in tackling organisational challenges such as inefficient performance, low productivity, poor service delivery and absenteeism.
- ETD promotes the employability of designated groups. The government financially supports companies, non-governmental organisations (NGOs) and community-based organisations (CBOs) to introduce skills development programmes. These programmes assist the unemployed to acquire skills that will enable them to enter the labour market and/ or to start their own small businesses.

- ETD expedites employment equity. The skills development legislation makes provision for a levy grant for employers to promote the development of Blacks, Coloureds and Indians, women and the disabled to address the inequalities in the educational and equity profile of the South African labour force (Grobler *et al.*, 2006).

Kapunda (2016) mentions that, managers are instrumental in supporting employees in learning and development activities, and that these managers contribute significantly to the motivation of employees to transfer learned skills to their jobs. According to the OECD Report (2013) there are a number of interventions that SME's implement to build their skills base. These are:

- Entrepreneurship skills: specific skills ranging from risk taking, management, strategic thinking, self-confidence, networking and challenge acceptance and resolution;
- Management skills: business planning, regulation compliance, quality control, HR planning and allocation of resources;
- Financial skills: financial recording keeping, drawing up annual statements, financial planning and taxation;
- Technical skills: problem solving, design, operations, machinery and technological structures, information technology (IT);
- Customer service: customer handling, appreciation of customer support, response to and resolution of customer complaints, and value-chain partners;
- Social skills: motivation to develop, appreciation of people's characteristics, team work; and
- Routine skills: basic knowledge and low-knowledge skills.

If we glance across the South Africa business landscape, scarce and critical skills remain a strong concern for both small and big businesses. The Department of Labour, DoL (2016) argues that scarce skills are an absolute or relative demand for skilled, qualified and experienced individuals to fill specific roles and/or professions. According to Molodchik and Jardon (2017), skills are normally linked to a qualification. The South African Government acknowledges that the country is faced with the critical challenge of skills shortages, which have serious ramifications for economic growth and job creation (SAIRR, 2008). The South African Government has worked tirelessly to ensure that a sound legislative framework exists for skills development. Skills development legislation is embedded in the spirit of growing the workforce, with clear benefits for both employers and employees.

According to Machika (2014) the purposes of the Skills Development Act (97 of 1998), which include SME's are to:

- Develop the skills of the South African work force;
- Improve investment in education and training in the labour force and to increase this Return on Investment (ROI);
- Use the work environment as a self-motivated learning environment and to give employees opportunities to acquire new skills;
- Motivate employees to take part in learning interventions; and
- Ensure the quality of learning in the workplace.

The Impact of COVID-19 on the Human Resources Function for SME Owners

Small business owners in South Africa have the backing of government to assist in training their staff. The Skills Development Levies Act (9 of 1999) in South Africa can assist SME owners get back their costs for training. The following are payment of the levy for training staff, as noted by the Department of Labour, DoL (2016):

- Training and development courses;
- Skills development facilitator workshops;
- Discretionary grants, including learnerships that endorse employees if they have KSAs acquired through experience;
- Special projects funding in the form of a training interventions, that SETAs believe are worthy of being funded (The primary function of SETAs are to contribute to the raising of skills, to bring skills to the staff within business, or those people wanting to be employed);
- Free SETA assistance and call centres; and
- Assessment and moderation processes for course accreditation and learnership moderation.

Once the training has been carried out the next step is to evaluate it to see any shortfalls. Many SME owners are happy to train staff but stop there. The owner needs to evaluate the training to see whether it did what it set out to accomplish for the firm in the first place. Robson and Marvin (2014) note that from an organisational perspective, training evaluation is important for the following reasons.

- It provides evidence of an investment in employees and information on which employees should participate in training activities;
- It assists in making decisions about prospective interventions; and
- It establishes the value interventions brings to the organisation and justifies money spent on training.

Since SME owners experience challenges during the evaluation of training, it is important to understand why this is so, so that it can be limited or removed in the future. Nolan and Garavan (2016) mention that SMEs experience the following challenges in evaluating training:

- Cost, laziness, fear of criticism, lack of evaluation methods and expertise, and the time evaluation consumes;
- Training practitioners find that management does not always show an interest in evaluation;
- Only a few organisations endeavour to capture the influence of training on their triple bottom line; and
- A lack of resources and knowledge on how to evaluate training

In the above section, an in-depth understanding was provided on why training and development of staff within an SME is relevant. The discussion that follows would further elude to exploring the relevance and importance of implementing new technology and ICT's within an SME and the need for training the small business owner and his/her s. The world has changed, technology which touches every aspect of business at some point is important to understand and implement within this day and age. This is very crucial for a small business's survival, growth and sustainability. A SME owner cannot sit back and not keep abreast of the changes in the macro-environment, specifically those in the technological environ-

ment. ICT and technology training for the SME owner and his/staff, especially during COVID-19 was an important catalyst that assisted in the continuity and survival of the business. SME's had to operate on digital platforms, during the lock-downs. Staff had to be trained in working online and using the necessary technologies to ensure they still reached their customers. It is true, making changes to include ICT's and technology within a SME is often very costly. However, the business owner should understand that this initial cost far out ways the long term benefits that can accrue to the business. In order to make money, a business owner has to spend money. Monies spent on doing technology upgrades within the SME and training staff to use such systems and process's is an investment in the future sustainability of the business. During COVID-19, SME's that worked on digital platforms and had staff who wee trained to operate these online systems were in a far superior position than SME's who remained closed during the lock-downs.

There needs to be a change of small business owners mind set in the manner in which they view change, specifically technological changes. Change is often not easy for an SME owner to accept, however, with time and knowledge about ICT's and technology the attitudes of small business owners would eventually change. The author would also like to reiterate that the pandemic adjusted many small business owners attitude on working on digital platforms as it was a way to keep themselves, their staff safe and their loyal customers safe during COVID-19. Once SME owners see the benefits, future cost cutting and the efficiency of using and implementing ICT's and the new technology, then this would be the game changer for the business owner. The researcher believes that SME owners want to survive; and providing customers with digital options can keep the SME in business and ensure its' long-term survival. The researcher also believes that NGO's together with government organisations and universities should take the lead in educating SME owners about new technologies and ICT's. The 4th industrial revolution is upon us and SME owners if educated would make the necessary changes to survive in a very dynamic and rapidly changing business environment. Having well trained staff who use technology and ICT's in their everyday operation to improve overall efficiencies can be a major competitive advantage to a small business. Clients or customers want high levels of efficiency in their service offering. They would rather choose a service encounter with a small business enterprise that differentiates itself from other service providers. During COVID-19, staying home for many customers was the safest option and shopping online was the best way to accomplish this. By shopping online, customers avoided crowded malls and lots of people.

7. RECOMMENDED CHANGES TO HR FUNCTION IN SME's IN SA DUE TO COVID-19

The human resource function as we know it has changed due to COVID-19. This has also been the case in SME's in SA, as government rolled out laws and protocols that all businesses needed to follow during the pandemic. The various drastic changes made, was done, to ensure the safety of staff and the general public during the COVID-19. Some of these recommended changes will be discussed and why they are of benefit to the small and medium enterprise and its' employee will be outlined.

- Staff working from home

The Impact of COVID-19 on the Human Resources Function for SME Owners

COVID-19 had many lock downs and shut downs that affected businesses and organisations world-wide. To curb the spread of the virus, businesses/organisations had staff work from home on online platforms. This meant staff had to adapt to a new normal. In South Africa and Africa, this was a new approach for many SME's as well. SME owners had to equip staff with the necessary technology and infrastructure to continue operations from home. Staff training was essential to assist staff in this transition. This was a new situation working from home so staff needed guidance by the SME owners and managers. Communication was crucial, so that problems arising could be dealt with so that customers and normal online business operations were not compromised.

- **Staff working online**

COVID-19 had many lock downs and this forced many businesses, SME's included to migrate online. This was not easy for staff or the customers. This meant HR had to ensure training was in place to ensure staff were fluent in navigating the online systems. It also had a major cost implications to migrate online, so SME, owners had to invest their own capital or acquire loans or micro-financing from banks and government. Government subsidies were also available where possible, so SME's in South Africa could take advantage of this source to fund their online business operations. However, it should be noted that not all SME's could move their operations online. Staff also had to be trained on online etiquette with clients.

- **Staff leave policies revised due to pandemic**

SME's and their owners and management had to comply with the law and have their staff who tested positive for COVID-19 to stay home and be in quarantine for 10 days. The staff had to then retest to show that they were ok to return to work. Staff working online would also be given leave if they tested positive and same leave policies would apply to them as well.

- **Staff vaccination**

In SA, vaccinations are not mandatory. Businesses can be taken to court by the employee if they can prove they were forced to vaccinate and are unable to work due to the vaccination having compromising their health and ability to function normally. A business can be liable to then pay for the staff member every month, because they had forced the employee to vaccinate and this damaged the person ability to function as normal. SME owners and managers should give staff time off to vaccinate and if they get sick, sick leave policies need to be in place. In certain sectors like the health sector vaccinations for staff was mandatory.

- **Staff wellness**

Staff in SME's were also affected by COVID-1. The rate of infections especially during OMICRON strain of COVID, impacted employees within the workplace at a very high rate., Many were infected by this new strain. COVID-19 also impacted SME staff working from home during the pandemic. Watching family or friends or colleagues die during the pandemic had a psychological effect on staff. Burnout, anxiety, panic attacks, severe mood swings, manic depression, post- traumatic stress are some impor-

tant aspects of wellbeing that SME owners/management need to take cognizance of especially during COVID-19. Ho et al. (2020) reported that any individual could suffer from new psychiatric symptoms, even without having a previous history of a psychiatric illness. Symptoms such as anxiety, fear of infection and death, anger, hopelessness, stigma, and blame all could happen during such pandemic. Hayes et al. (2020) found that the COVID-19 pandemic imposed more distress on individuals with insufficient experience for working from home before COVID-19 restrictions and who were females, which can be as a result of gendered roles at home in some cultural settings as well. Wong et. al., (2020) argued that employers have the same duty of care to their staff during a pandemic as in other circumstances and should take steps to safeguard the health and safety of their staff.

The following programs can be designed by SME's for short-and long-term employee emotional well-being. Ghosh (2020) indicates in his research that they should include the following:

- Well-designed and transparent communications plan for critical messaging and sharing of accurate information
- New leave policies
- Emotional and professional coaching via industry leaders and life coaches
- Mental health support with the help of counselors,,psychologists and psychiatrists via dedicated helplines
- Use of digital technology like AI chatbots, which are designed to help employees focus better on work when away from the normal workplace
- Engaging, empowering and energizing the workforce via motivational speakers, experts from various walks of life through webinars, and dedicated organizational communications channels
- Online learning to help employees stay updated and acquire new skills using various online teaching applications and platforms
- continuous employee awareness campaign to promote hygiene (Ghosh, 2020)
- Staff safety protocols at work

Safety protocols in South Africa by all business owners is mandatory. This includes SME owners as well. The SME's must provide a safe working environment for staff. Hand sanitisers must be provided for staff. They must be kept at the entrance of the store, dept. or business entrance. Staff must also be provided with masks and protective gear. Hygiene is very important during the pandemic. Temperature checks for staff should be done every day. Staff that have contacted COVID-19 should be put on leave. They should return once they are better so that they do not infect other members of staff within the enterprise. Staff have a duty and responsibility to report to their employee on their COVID status.

- Training. During COVID-19 staff within SME's in SA needed to be trained in safety procedures, IT and new digital processed and procedures. SME employees who worked remotely also had to be provided training on how to manage this new shift in their job environment. Training could take place within the organization or on online platforms by the SME's depending on whether their employees were working at the office or remotely.

8. RECOMMENATIONS ON USING ICT's IN SME's DURING COVID

ICT's are computer tools or devices used by small and big businesses in their everyday operations. This discussion will begin by defining ICT in a work- based context. Afolabi and Abidoye (2011) define ICT as 'the usage of electronic devices such as computers, telephones, internet and satellite systems to store, retrieve and disseminate information in the form of data, text image and others'.

Since ICT's have such a phenomenal impact on the way a business operates and runs it is important for owners of SME's to understand and integrate ICT's in their everyday work operations. Tusubira and Mulira (2004) argues that it becomes necessary for organisations to integrate ICT into organisational functions in order to increase efficiency, cost-effectiveness, and competitiveness. Lasrado and Bagchi (2011), further adds that hardly any business transaction currently occurs without it being captured digitally at some point. Apulu and Lantham (2011) argue that ICT create competitive advantage and assist businesses to increase efficiency, which benefits SMMEs for business transactions, business growth and enables easy access to the market. Since many clients and customers opt for online shopping, because of convenience and safety especially during the pandemic, an SME would be in a great position to capture this market segment if it were to have online shopping facilities. It should also be noted that during the pandemic in August 2021, many South African business were under attack. They were looted, burnt and damaged during political violence that took place in Kwa-Zulu Natal and Gauteng- two of the biggest business hubs in SA. Many large white owned businesses and White, Indian and Coloured and foreign owned large, medium and small businesses were also targeted and looted and burnt and damaged or destroyed during the racial and political tensions during that period. This forced many clients and customers to use SME's and purchase from them online where applicable, as going to bigger companies were a risk as they were being politically targeted by violent protesters. People had to protect their homes and communities and because of the racial tensions and violence, travel was restricted, and people bought online or face-to face from their local SME's to avoid the violence and keep safe from the racial and political tensions that engulfed the country at that time.

Various theorists' views on how important ICT's are for a small business is included below to support the researchers' claim that SME's will perish if they do not integrate ICT's into their everyday business operations. The researcher is in agreement that ICT's are pivotal for SME's survival during COVID-19, as the various lock-downs had an impact on movement. SME's that digitized their operations and had their staff work from home had a better chance of survival during the pandemic. Other advantages of SME's using ICT's are cited by Berisha-Shaqiri (2015) who argues that the Internet enables SMMEs to minimize cost in marketing because enterprises can reach broader markets using social media such as Facebook, Twitter and other online media to market their products free of charge and at the same time reaching large audiences. ICT helps SME employees, suppliers and stakeholders to share audios and videos related to the projects on real-time, products or services they are offering via emails and other communication tools, while meetings are conducted on virtual platforms using Skype and teleconferencing. Pride, Hughes& Kapoor (2014) argued that ICT benefit SMMEs because it enables online payment, which helps small businesses to reach global and domestic customers as well as improve productivity in terms of data processing, business reporting, making communication easy and aid in smart decision-making. Sometimes it is important for a small business owner to be connected to his employees. According to Carroll et al. (2002) mobile phones also provide employers the opportunity to be connected to their employees at all times. Castells (2000) elaborates that ICT is both a structure and a process that enables the exchange, the redirection, and the reception of information, on a global scale, without

restraints of space or time. Distance is rendered irrelevant, allowing direct, simultaneous, decentralized, and expanding relations of collaboration, advocacy, trade, production, and innovation, generating new forms of power constellation and distribution.

Investing in ICT bears a considerable cost to the business. There is greater ease for big business to integrate ICT's into all their business operations because they have the necessary cash flow at hand to make the investment. The cost however, for small business owners to integrate ICT's into their business can be a commitment that is very large for them to bear. In South Africa, the Skills Development Levies Act (1999) can assist small business owners who have registered businesses entities to claim back certain cost associated with training and development for their staff.

The researcher is of the opinion that it is not the SME owner's reluctance to use ICT's based on his/her attitude or ignorance of the subject matter, but rather the cost of implementing such a system that he/she often does not have at their disposal that renders them powerless to using ICT systems that can benefit their operations. Sameni and Khoshalhan (2006) argues that businesses are still using traditional methods and these enterprises can switch to use ICTs only if the benefits derived are higher than the investment and maintenance costs. Human resource processes should be focused on the strategic objectives. These strategies are led to prepare an IT strategic plan that in turn translates into an appropriate human resource strategic plan in the field of IT. Kuriyama (2017) further argues that, while some SME's spend large sums of money on training and a large number of employees receive training yearly; only a few SMEs evaluate the ROI from training.

The COVID-19 pandemic has caused dramatic environmental changes that encouraged firms to adopt digital technology on a wider scale and under time pressure. The firms have attempted to adopt it in a matter of days, because the slower it is adapted, the bigger the gap would be regarding the changes needed in the business environment. However, not all businesses can digitize all their activities. Besides, for SME's, the costs associated with the new technologies and training staff are important, and in many small businesses staff may not all have the necessary IT capabilities like SME's in the West. The researcher is of the opinion that SME's in South Africa and Africa, are often slow to adapt to digital platforms because staff do not have the know-how, expertise or capabilities.

The section below will explore training staff in SME's online. Staff online training was especially useful during a disruptive phase like the COVID-19 pandemic.

9. RECOMMENDATION ON USING ICT'S IN TRAINING AND DEVELOPING STAFF WITHIN SME'S DURING COVID-19

During the COVID-19 pandemic many businesses SME's in SA included, had to change their business model and operate on online platforms in order to remain open and sustainable during the various lock downs imposed during the pandemic. SA, had once of the severest lock-downs and this impacted on SME's and big business as well. Since many companies were shut down, this created an opportunity for SME's to migrate their operations online where possible. This transition, was new to SME's and required that the enterprise train their staff on COVID protocols and using the new technologies and online customer/client interactions.

The literature indicates that employees in SME's have strong views on adapting to technology. Madden and Jones (2008) indicate that ICT influences individuals positively and negatively within an enterprise. Some of these positive effects include employees' improved ability to do their job and to

share ideas with co-workers. Another benefit is employees having flexible working hours. The negative effects include increasing work demands and hours, higher stress levels, and the difficulty to disconnect from work when at home.

SME owners also need to bear in mind the cost associated with new technologies and the high training cost attached as well. Training, cost money and time. Many SME owners may not have such funds to invest in their employees. Mazzarol (2003) posits that SME's are generally hesitant to provide funds for employee training and development. However, training and developing staff can assist in keeping staff knowledgeable about important processes, techniques, increases efficiency and makes people happy to know that their organisation values them enough to train and develop them. Aguinis and Kraiger (2009) indicate that training and development may result in improved job performance, acquisition of new skills and self-efficacy or self-management skills of employees. Sarvadi (2005) states that training and development should be viewed as an investment and not an expense, because it is essential and not optional for the success of the business. Research conducted by on HR in SMME's in SA has added that:" HR practices in SMEs tend to be informal and reactive to the needs of the firm. this state of affairs does not reflect anything wrong with the practice of HR in SME firms but rather explains the unique nature of HR practices that characterise SME firms, which are glaringly absent in larger firms". Nyamubarwa, W; & Chipunza, C. (2019).

The main challenge in training SME staff, is giving employees time off to attend the training. However, with E-learning/training, an SME owner can invest in training and developing of their staff members while they are still working or from online platforms. Staff members can now study on-line and obtain credentialing without even attending lectures. According to Naidoo (2018), the most important resource of any organisation is its human resources. The staff complement of an organisation if trained and developed and motivated accordingly can become the organisations most formidable competitive advantage. Due to time constraints at work, work pressure or family commitments, opportunities to study and upgrade their qualifications were often not possible for an organisations employees. However, through E-learning, a woman who was previously disadvantaged can now study and receive a degree or certificate. This can improve her chances of employment and possible promotion within the enterprise. The author is of the opinion that in this instance, E-learning platform have changed the dimensions of teaching and learning, and uplifting the lives of employees. In a traditional system, the learners had to be present in the classroom. In E-learning, the learner can access the learning site at home, in the park or even at work. There is no more space constriction. Although techno-stress can impact on the learner as they may lack knowledge of the online system, through training recordings put in place by the online institutions, this reduces the techno-stress. Ulrich et al. (2008) adds that with the development of E-training platforms it is now possible of workers to have access to individual training kits.

The following barriers for SME's to use ICT's in training and development is listed by researcher. They are as follows:

- The SME owner has a negative attitude towards ICT's and technology. This can negatively affect the manner in which training and development is carried out within a SME.
- The SME owner has a lack of knowledge about technology and ICT's. This makes it difficult for him to employ them in his firm. Martin (2005) argues that SME owners may have a lack of knowledge about the strategic use of ICT. To overcome this obstacle, government and NGO must be more influential in their campaigning and funding of SME in integrating technology into their firms,

- The SME owner or employee does not like change. Change is something no one likes in the world or organisation, however it is essential to learn tools how to embrace and tolerate changes so that it does not affect the smooth running of the business or the employees' job. Even an employee can resist change as he or she feels overwhelmed by the new process and feels his or her job will be threatened. To overcome this, a SME owner must have training in place that prepares staff to embrace and tolerate change in a more positive manner.
- The costs are too high for SME. Using ICT's in training and development is a costly investment, but the SME owner must see the long-term benefit of this. Perceived high setup cost Jackson (2007) argues that there is high-perceived set up costs associated with ICT's for SME's and so they often do not have a budget for it. Supyuenyong, Islam & Kulkarni (2009) adds that a lack of resources among SMMEs leads to very little human resource development.
- Lack of infra structure in rural areas can often deter a SME owner to adopt ICT's.
- The technology is constantly changing; this can cause great confusion to a SME owner. By the time, he decides to implement an ICT another new one may pop up.

However, although all the above barriers do exist, in SME's online training and development of staff, during COVID-19, the playing fields changed drastically and online training and development was the only suitable option to keep employees safe, but clued up on how to employ online technologies, working from home and working during a pandemic. Zoom and Microsoft teams also became very useful for small businesses to hold training sessions. There was also online learning for staff who were credentialing.

10. CONCLUDING REMARKS

ICT's and technology are no longer something new. ICT's permeate every area of society. It also has impacted on SME's. SME owners have to be strategic in their approach in dealing with ICT's. They have to come to the table and embrace the new digital technology. From the various theorists views put forward in this paper, and the authors own thoughts it is clear that ICT's lower costs, and benefit the SME in the long term. In training and developing function, which is an important area of human resources, the use of E-training and E-learning is the way to go, to adequately train and develop staff without having them absent from work. The author is of the opinion that managing people within a South African SME, is one of the most difficult and challenging tasks conducted day to day by the business owner. Managing staff and keeping them happy, properly rewarded and skilled is essential for the smooth running of a small business. The author reiterates that ICT's and technology can make training and developing staff more easier, however, the cost should not be seen by the SME owner as a disadvantage, in fact in the long-term it should be treated as an investment. With the COVID-19 pandemic, there is no longer much fuss about online training and E-learning by staff, as it was the only way to remain safe during the pandemic that claimed millions of lives world-wide. New HR policies and protocols were also made mandatory for SME's and all businesses in SA, as this was the only way the SA government saw fit to safeguard its' workforce and the general public. To survive and keep a healthy workforce and a healthy customer base, required safety protocols being put in place for all businesses in SA. To sustain SME's and keep them in business, SME owners had to abide by the law and the new COVID-19 regulations for business. The people of SA, also had a duty and responsibility to wear their masks, practice social distancing and sanitizing their hands, when shopping or conducting any business transactions.

11. FUTURE AREAS OF RESEARCH

COVID-19 and E-learning and e-training opportunities for SME's in developing and undeveloped countries should be the focus of future research. Since very little is researched and written on this area, it could contribute substantially to the debate on using ICT's for training and developing staff within SME's during a pandemic. Another area that is notably important and should be explored is the changing mind-sets of SME owners towards ICT's and technology in developing countries. Since so little information is available on this area the researcher believes, it is crucial to engage in further research in this area. Another area to support for future research is family owned small business and their perceptions on ICT's and technology, especially during COVID-19. Since family owned business are major drivers within economies worldwide, it is crucial to unpack how these businesses are integrating technology and ICT's in their everyday business operations to keep abreast of changes in technology and the 4th industrial revolution and the COVID-19 pandemic.

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KEY TERMS AND DEFINITIONS

COVID-19: This is a highly infectious disease caused by the SARS-CoV-2 virus. It appeared in 2019. It has caused the greatest global pandemic, known to mankind.

Human Resources: This refers to the respective people who work within the firm or business. They can be categorised as skilled, unskilled, or semi-skilled labour.

ICTs: This refers to computer tools and devices used by an organisation or business enterprise in their everyday business activities.

SME: This refers to small-to-medium enterprise. Each country has legal regulations governing size and turnover of SMEs.

Staffing: This refers to hiring of staff for an organisation or enterprise.

Training: This refers to providing skills and development to staff within an organisation.

Chapter 16

Managing Business Continuity in the COVID-19 Era: Case of a Manufacturing Company in Thailand

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ABSTRACT

Almost two years since the first reported confirmed case, the novel coronavirus disease 2019 (COVID-19) continues to impact people around the world. While some companies could adopt a work from home strategy to cope, manufacturing companies did not have such a choice. Subject to government regulations and possible closures to curb the spread of COVID-19, manufacturing companies need to find ways to mitigate risks and continue operating. This chapter shares the case study of how a framework (COVID-19PAL) helped a multi-national manufacturing company of 29,000 employees situated in Thailand deal with a high number of infections and continue to operate safely. The COVID-19PAL framework draws from different disciplines (such as epidemiology, physics, mathematical modeling, sociology, and social psychology) and provides necessary information for human resource professionals to be effective in dealing with a pandemic. This chapter thus fills an existing gap in literature, assisting human resource professionals, organization leaders, and employees to understand what the situation meant.

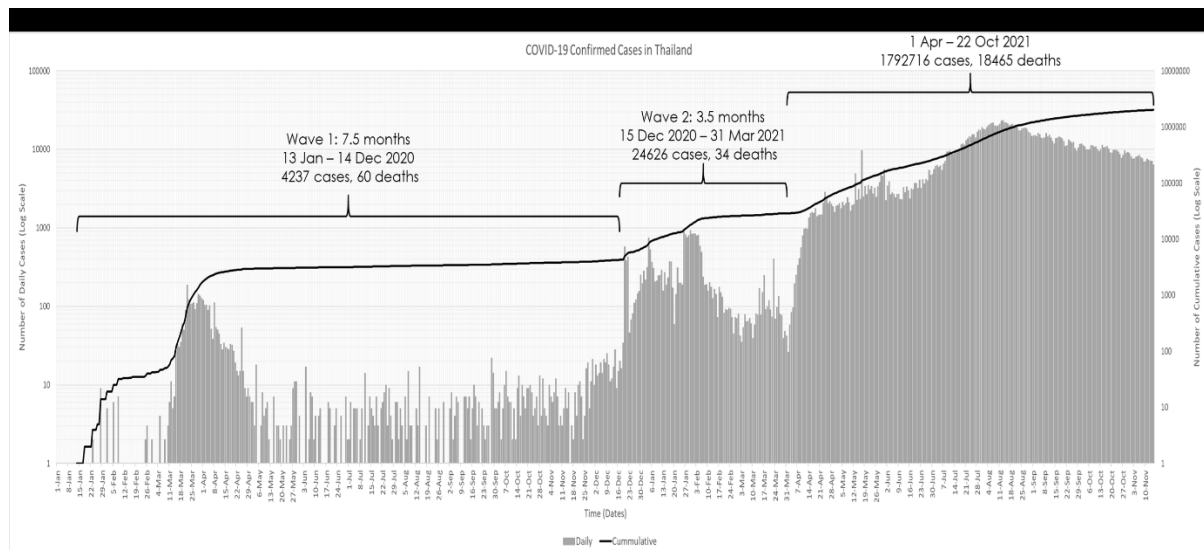
INTRODUCTION

More than 18 months since its discovery, the novel coronavirus disease 2019 (COVID-19) rages on; as of 15 November 2021, there were more than 254 million confirmed cases worldwide, including 5.1 million deaths reported (Worldometer, 2021a). Thailand, like many other countries, continues to deal with the current pandemic. According to Worldometer (2021b), Thailand recorded 2.02 million confirmed

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cases and 20,079 deaths as of 15 November 2021 with an average of 7,300¹ (Dong et al., 2020; Ritchie et al., 2020)² new confirmed cases reported daily. Thailand recorded its first case on 13 January 2020, and became the first country outside of China to report a confirmed COVID-19 case (World Health Organization, 2020). Since then, there has been three ‘waves’ (Tanomkiat, 2021), each more serious than the previous in terms of number of cases and deaths (as shown in Figure 1). Thailand ranked 116th in a list of 221 countries and territories in terms of the total number of cases and total deaths at the beginning of April 2021. In contrast, Thailand is currently ranked 24th in the same list as of 15 November 2021 (Worldometer, 2021a).

Figure 1. Temporal representation of the number of daily and cumulative confirmed cases in Thailand since the beginning of COVID-19; graph created from data obtained from Worldometer (2021b)



The COVID-19 pandemic affects not just a single region but spreads across international boundaries (Monti et al., 2021). The impact due to mitigating actions by governments to curb the spread of COVID-19 is not insignificant (Nicola et al., 2020). Such actions often add uncertainties to already complex situations. Existing literature suggest that a key element in a crisis management plan includes ways to deal with uncertainties (e.g. Sharma et al., 2020). McKee (2021) summarized critical lessons that enable a successful management of the COVID-19 pandemic. Virakul et al. (in press) emphasized the importance of drawing on past experiences with infectious diseases, motivating and mobilizing the society in adopting preventive measures, and leaders trusting science in making decisions.

There has been a plurality of scholarly articles published in various disciplines since the beginning of COVID-19. However, there seems to be a lack of literature that draws concepts from these different disciplines and presents an integrated view in a wholistic approach to help readers understand different aspects of COVID-19 and make sense of the information that health authorities are providing. There is also a lack of such literature in the context of a medium-to-large scale (in terms of employee population) manufacturing company in continuing operations to (a) meet business goals, (b) provide a safe working environment, and (c) curb or prevent the spread of COVID-19. Even more so when a practitioner (for

example, a human resource professional or employee of an organization) attempts to assimilate, discern, distill information and take action; a need that is obstructed by information overload. This chapter fills the gap by showcasing a framework deployed by a manufacturing company in a case study. This framework, COVID-19PAL, pulls together concepts from a multitude of disciplines (Epidemiology, Physics, Statistics and Modeling, Sociology, and Social Psychology). This framework assists (a) the human resource professional in relaying important information about the COVID-19 situation, (b) leaders of the organization to communicate more effectively, thus building trust with employees, and (c) employees to understand what the situation meant in their daily life.

This chapter traces an 18-month journey of such a company (name withheld to preserve confidentiality) in Thailand in a case study. The case utilized a framework that enabled the company to continue operating despite existential threats (for example, supply chain interruptions, a high case number, government restrictions, country lockdowns, etc.) in the COVID-19 pandemic. While many manufacturing companies of a similar or smaller size across Thailand have been ordered by provincial governments to shut down operations for 28 days or more even with a smaller number of confirmed COVID-19 cases, the case being discussed in this chapter has avoided being closed, continued production throughout the ordeal, and delivered better than expected economic outcomes. The case of interest is also hailed as exemplary by the local provincial government and as a role model to other manufacturing companies around the region. This chapter shares how the framework was deployed and helped leaders and employees learn how to use critical information. This chapter also demonstrates the role of human resource development as espoused by McLean and Jiantreerangkoo (2020) in the context of COVID-19, albeit at the scale of an individual organization.

The objectives of this chapter are to provide insight to the following questions, through the lens of an organization in a single-case case study (Yin, 2014) coping with COVID-19 from the perspective of the authors (that is, autoethnography; see Adams et al., 2014; Ellis, 2004), namely,

1. What is the risk or likelihood of the presence of an infected person within the premises?
2. What is the risk or likelihood of transmission within the premises?
3. What is a suitable response plan to ensure business continuity and how can effectiveness of the plan be measured?

This chapter will first present a synopsis of relevant literature important to the crisis management framework adopted by the case of interest in successfully avoiding closure, mitigating existential risks, and continuing manufacturing activities in the face of the COVID-19 pandemic. The main body of chapter will describe elements of the crisis management framework, COVID-19PAL, and how each element is used or deployed. The chapter will conclude with a recommendation for further research.

A REVIEW OF RELEVANT LITERATURE

Perhaps a challenging (and somewhat daunting) task that befalls any individual in the COVID-19 pandemic besides the uncertainty is the notion of information overload; not knowing how to discern critical information from noise or wavering in the wake of conflicting information could result in anxiety. The human resource professional is often seen as one who is well-informed and experienced on the topic and well-versed to handle the situation. The human resource professional is also often expected to undertake

a role to assist organization leaders and employees in dealing with COVID-19; such roles are often different than existing ones (Dirani et al., 2020).

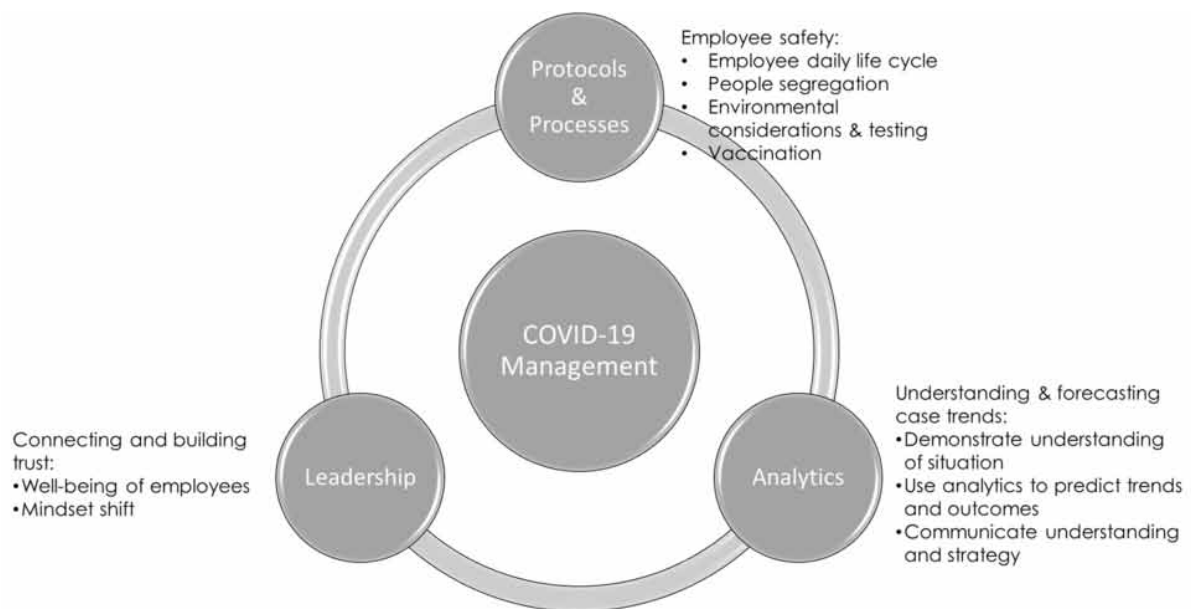
The authors have seen first-hand how leaders of an organization facing the COVID-19 pandemic defer decisions entirely to their in-house medical teams or medical professionals, not realizing the reality that medical professionals and teams are still learning about COVID-19. A salient but often neglected point is that successful crisis management often involves multiple disciplines, including social sciences (Al-Dabbagh, 2020). There are also useful concepts that aid situational assessment and decision making that are non-medical in nature.

This section is designed with this in mind and aims to provide readers with key concepts of the framework used by the case. However, it is not the objective of this section to provide in-depth treatment of the concepts; a brief but sufficient introduction is provided instead.

COVID-19PAL: A Conceptual Framework

The COVID-19PAL conceptual framework (as shown in Figure 2) consists of three parts, namely, (a) protocols and processes, (b) analytics, and (c) leadership. Protocols and processes are aimed at ensuring employee safety at the manufacturing site from the perspective the employee's daily life cycle at work, people segregation (that is, physically distancing), environmental factors related to the transmission of COVID-19, and vaccination. Analytics are aimed at understanding situations around and within the manufacturing site, assist leaders in decision-making, as well as provide key information that leaders can communicate with employees. Leadership is aimed at connecting and building trust with employees in order for employees to feel safe enough to continue coming to work.

Figure 2. The COVID-19PAL conceptual framework consisting of three parts aimed at addressing employee safety, understanding and forecasting trends, and connecting and building trust with employees



The rest of this section is organized around key concepts utilized in protocols, analytics and leadership. Literature relevant to protocols include (a) ventilation, and (b) Wells-Riley equation. Literature relevant to analytics include, (a) basic reproduction number, (b) Wells-Riley equation, (c) Gaussian approximation, and (d) social network analysis. Concepts relevant to leadership include (a) social identity approach, (b) adult attachment style, and (c) sociograms.

Literature associated with analytics involve equations and mathematical modeling. While it is common to see mathematical modeling in social science publications, it is not common to see mathematical equations from applied sciences in literature reviews of social science publications. The use of the relevant equations discussed within each of the key concepts in this section will be demonstrated in later discussions, for example,

- Reproduction number used as a means to ‘look ahead’ to see if the trend of confirmed cases will tend to rise or fall within the next five days (refer to discussion around Figure 9 later), or to confirm if current situation is coming under control (refer to discussion around Figure 10 later).
- Gaussian approximation used a means to understand where the temporal trend or profile of confirmed cases will tend (see discussion around Figure 11 and Figure 12 later).
- Wells-Riley model used to estimate the risk of infection (see discussion around Table 1 later).
- Social identity approach and adult attachment as key theoretical concepts underpinning leadership in dealing with the COVID-19 pandemic.
- Use of sociograms to assist in identifying enhancement opportunities in deployed preventive measures and communications (refer to discussion around Figure 7 and Figure 8 later).

The reader is reminded that this chapter is focused on application and therefore the rigors of mathematical derivation of the formulas are not presented. Each equation presented is in a form fit to be applied within the context of the case.

Basic Reproduction Number

The discussion of infectious diseases or epidemic theory cannot be carried out without involving a quantity known as the basic reproduction number, R_0 (Heesterbeek, 2002). The basic reproduction number, R_0 , is defined as “the expected number of secondary cases produced by a typical infected individual during its entire infectious period in a population consisting of susceptibles only” (Heesterbeek & Dietz, 1996, p. 89). The (infectious) disease is expected to spread if R_0 is equal or greater than one but cannot if the quantity falls below one (Diekmann et al., 1990).

An approximate method for calculating R_0 (Lipsitch et al., 2003) is provided here for practical purposes. Readers are advised the R_0 calculated using the following method should only be used as relative comparison within the context and situation of interest, and when cases continue to occur. Readers who prefer an accurate, mathematical treatment should acquaint themselves with a different set of literature (e.g. see Hethcote, 2000; Kermack et al., 1927; Li et al., 2020; Tang, Bragazzi, et al., 2020; Tang, Wang, et al., 2020). The following steps are taken to give an approximate value of R_0 and following a susceptible-exposed-infectious-recovered (SEIR) basic model (e.g. Carcione et al., 2020; Gatto et al., 2020; He et al., 2020).

Step 1: Estimate the duration of exposed state, T_{exp} , the time period when an individual is infected but not yet infectious (Lipsitch et al., 2003). For practical application, the authors recommend using the (non-contagious) incubation period of COVID-19 (Nah et al., 2014; Yu et al., 2019) as T_{exp} .

Step 2: Estimate the duration of infectious state, T_{inf} , the time period when an individual is infectious. There is a subtle difference when looking at symptomatic transmission, pre-symptomatic transmission and asymptomatic transmission, which is also dependent on the characteristics of the dominant COVID-19 variant. For practical application, the authors recommend using generation time as T_{inf} rather than calculating it from serial interval (cf Lehtinen et al., 2021) as pre-symptomatic transmission and asymptomatic transmission could dominate in a COVID-19 situation and serial interval could be a negative quantity (Knight & Mishra, 2020).

Step 3: Estimate the growth rate, r , by taking the ratio the increase in number of new cases to the initial total number of cases for the current time period (Lipsitch et al., 2003; Schlickeiser & Schlickeiser, 2020; Vynnycky & White, 2010). The authors recommend daily growth rates be used, rather than aggregate period growth rates.

Step 4: Estimate the R_0 using the formula (Lipsitch et al., 2003):

$$R_0 = 1 + r(T_{exp} + T_{inf}) + r^2 T_{exp} T_{inf} \quad (1)$$

The reader should note that this formula is useful when cases continue to occur; it is less meaningful when cases decline to zero, at which point the formula no longer provides an accurate measure due to the fact that the minimum value is one (numeric). A true R_0^3 can be a positive value between zero and one (numeric).

Ventilation and Wells-Riley Equation

Studies and modeling of indoor airborne / aerosol transmission (e.g. Bazant & Bush, 2021; Lelieveld et al., 2020; Li & Tang, 2021; Lin et al., 2021; Loomans et al., 2020; Miller et al., 2021; Noakes & Sleight, 2009) since the beginning of COVID-19 has been plentiful. In most of these studies, a specific reference was made to the Wells-Riley model (see Riley et al., 1978; Wells, 1955 for explanation of model). Studies have also urged review of how transmission of COVID-19 occurred (Dancer, 2020; Morawska & Cao, 2020), in particular the debate of ‘airborne’ or ‘droplet’ transmission (Tang et al., 2021), and alerting the world to focus on ‘air quality’ – that is, how often air is being refreshed, exchanged with fresh air or cleaned (Morawska & Cao, 2020; Morawska et al., 2020; World Health Organization, 2021b). Drawing on several of these works (e.g. Dai & Zhao, 2020; Loomans et al., 2020), with details like inhalation rate (e.g. Duan et al., 2015), mask or social distancing efficiency (Davies et al., 2013; Sun & Zhai, 2020), this section presents a form of Wells-Riley model for consideration.

$$P = \frac{N_c}{S} = 1 - e^{\frac{-P_d I q p t (1-s_i)(1-s_s)}{Q E_z}} \quad (2)$$

Here,

- P is the probability of infection risk
- N_C is the number of newly infected cases
- S is the number of susceptible people
- P_d is the social distance index, given by
 - $P_d = (-18.19 \times \ln(d) + 43.276) / 100$
 - d is the distance between persons or social distance (Sun & Zhai, 2020), and $\ln(d)$ is the natural logarithmic value of d .
- I is the number infected persons present (usually assumed $I=1$)
- q is the quantum generation rate (see Schibuola & Tambani, 2021 for typical values)
- p is the pulmonary ventilation rate of susceptible persons based on activity (see Duan et al., 2015 for typical values)
- t is the exposure time
- $\cdot_I$ is the mask efficiency of the infected persons present (Davies et al., 2013; Z. Wang et al., 2021)
- $\cdot_S$ is the mask efficiency of the susceptible persons present (Davies et al., 2013; Z. Wang et al., 2021)
- Q is the room ventilation rate, which is equal to $\gg_{vent} \times V$, where $\gg_{vent}$ is the air flow rate and V is the volume of the room
- E_z is the air distribution effectiveness (see ANSI/ASHRAE, 2019 for recommended values)

Other considerations could include, (a) accounting for situations where the infected and susceptible are both not wearing masks such as a cafeteria setting, (b) adding high efficiency filters and ultraviolet germicidal irradiation units to ventilation systems (Melikov, 2020), and (c) considering effect of connected rooms, hallways and similar multi-connected structures in the model (Noakes & Sleight, 2009). Commercial standards (e.g. ASHRAE, 2020; REHVA, 2021) also offer guidance.

Gaussian Approximation

Studies (e.g. Ciufolini & Paolozzi, 2020; Corsaro et al., 2021; Kröger & Schlickeiser, 2020; Schlickeiser & Schlickeiser, 2020; Schüttler et al., 2020) have shown that the Gaussian function is sufficient to describe ongoing case trends within a region and a Gaussian mixture is sufficient to describe the case trend over time. According to Schlickeiser and Schlickeiser (2020), “the best justification for the Gaussian, or normal distribution for the virus time evolution is given by the central limit theorem of statistics” (p. 164). The temporal profile of the daily number of cases at time t is given by (see Kröger & Schlickeiser, 2020):

$$c(t) = C_{max} e^{-\frac{1}{2} \left(\frac{t-t_{max}}{w} \right)^2} \quad (3)$$

In the expression, C_{max} denotes the highest number of cases recorded in the time period (that is, the peak case number) occurring at time t_{max} (that is, time where the peak case number is observed since beginning of the period) with a duration of w (that is, the dispersion of the time period). Then the total temporal profile enveloping all (random) occurring cases is given by the Gaussian mixture (see Corsaro et al., 2021):

$$r(t) = \sum_{i=1}^n A_i e^{-\frac{1}{2} \left(\frac{t - \tau_i}{\sigma_i} \right)^2} + c_0 \quad (4)$$

In the expression, A_i denotes the peak number of cases for each ‘cluster’ or ‘wave’ recorded in the time period of interest occurring at time τ_i with a dispersion of σ_i , coupled with a background constant c_0 .

The reader should note that spreadsheets such as Microsoft 365 Excel suffices in plotting the case number trend as well as construction of the Gaussian temporal profiles. Some (e.g. Kröger & Schlick-eiser, 2020; Schüttler et al., 2020) posit that this method of approximating the temporal evolution of COVID-19 could be used to predict future case occurrences.

The reader should also note that the use of Gaussian approximation follow the basic susceptible-infected-removed (SIR) or susceptible-exposed-infected-recovered/removed (SEIR) epidemiology model (Barmparis & Tsironis, 2020).

Sociograms and Social Network Analysis

It is often a challenge for human resource professionals dealing with COVID-19 to visualize (a) relationships between confirmed cases and close contacts, (b) possible impact relating to a cluster at a living area, or (c) presence of mass gathering within premises, etc.; all which contribute to bringing the pandemic to a manageable level (Bradshaw et al., 2021; Russell et al., 2020; World Health Organization, 2021a).

Sociograms and social network analysis (Borgatti & Lopez-Kidwell, 2011; Scott, 2017; Scott & Carrington, 2011) offer a means; social network analysis illuminates the dynamics of relationship between actors from different organizations and within the organization (Hatala, 2006). Social network analysis has progressed in the field of human resource and organizational development, albeit not yet becoming mainstream research tool (Hatala, 2006; Storberg-Walker & Gubbins, 2007) although scholars have written about it over the last two or more decades (e.g. Cross & Parker, 2004; Gubbins & Garavan, 2005; Storberg-Walker & Gubbins, 2007) since the seminar work of Wasserman and Faust (1994).

The social network approach is not only an instrument providing insight to relationships between actors but in itself is a system’s view and theoretical model of the connections and embodiment that exist (Burt, 1992; Granovetter, 1973; Uzzi, 1997; Wasserman & Faust, 1994; Wasserman & Galaskiewicz, 1994).

Social Identity Approach and Attachment

In an extended pandemic like COVID-19, it is inevitable that groups become ‘divided’ due to various reasons. Consider situations in which (a) one is infected, or (b) one is working from home compared to others who cannot, or (c) one is vaccinated compared to others who are not. Social identity theory (Tajfel, 1974; Tajfel et al., 1971; Tajfel & Turner, 1986) explains intergroup behavior, social conflict and social change predicated on the assumptions that individuals (a) strive to enhance self-esteem, (b) desire to achieve a higher (social) value that they associate with, and (c) derive prestige by comparing with other teams (Tajfel & Turner, 1986). Self-categorization theory (Turner, 1984) posits that when an individual experiences a process of embracing the idea of belonging to a group and start ‘to be’ like the group, that individual has undergone a process of “depersonalization” (Turner & Reynolds, 2012, p. 402). Depersonalization happens when an individual identity (how one thinks, what one says, what one

does, etc.) give way to a group identity (how the group thinks, what the group says, what the group does, etc.). When an individual is recognized as part of being a group, others' perception of that individual changes from seeing that individual as being unique, to a member of a group who has the same traits as the group (Hogg & Reid, 2006). Social identity theory and self-categorization theory complement each other and together form the social identity approach. According to Turner (1999), the creation of a group is not just an artefact of relationships existing amongst a group of individuals, but is a dynamic exchange and evolution of mindsets, character, bias, demeanor, approach, and conduct of individuals towards each other. It is perhaps a salient point to reflect upon, considering how individuals choose to want to proceed in one direction or distance themselves from a different standpoint, take risk, make decision, or sense-making in the face of tackling a crisis like the COVID-19 pandemic (Abrams et al., 2021; Cruwys et al., 2021; Cruwys, Stevens, & Greenaway, 2020; Cruwys, Stevens, Platow, et al., 2020; Greenaway & Cruwys, 2019; Haslam, 2020; Jetten et al., 2020a; Ntonis & Rocha, 2020).

The lens of attachment theory (Ainsworth, 1978; Ainsworth & Bowlby, 1991; Bretherton, 1992) offers an interesting perspective on the effect that secure (or insecure) infant-caregiver attachments have on the behavior towards one's surrounding and development of one's cognitive and socioemotional ability (Ainsworth, 1979). 'Anxiety' and 'avoidance' attachment styles impact the quality of relationships (Mikulincer & Shaver, 2016; Shaver & Mikulincer, 2006). This adds a flavor to understanding how individuals act and react in a work environment (e.g. Richards & Schat, 2011), especially relating to how one views oneself in relation to others within an environment (Brennan et al., 1998; Mikulincer & Shaver, 2005; Richards & Schat, 2011). COVID-19 presents a situation that the individual's attachment style could manifest as trust in protective behavior (Jørgensen et al., 2021) and the individual's ability to cope with distress (Moccia et al., 2020). There is no lack of literature on stress due to COVID-19 (e.g. Gritsenko et al., 2020; Husky et al., 2020; Roy et al., 2020; Shevlin et al., 2020; Yıldırım & Solmaz, 2020); even children (e.g. Jiao et al., 2020; Lee, 2020; Liu et al., 2020; Xie et al., 2020). Existing literature reflecting on attachment styles in relation to the emotional experience brought about by COVID-19 (Marčinko et al., 2020; Parent et al., 2021; Rajkumar, 2020; Segal et al., 2021; Steele, 2020) remind readers of attachment style and reaction activated by external threat (e.g. Bowlby, 1969/1982; Kidd et al., 2011; Mikulincer et al., 1993; Vrticka & Vuilleumier, 2012).

The COVID-19PAL framework is discussed in detail within the context of the case study.

THE COVID-19PAL APPROACH

The aim of this section is to discuss the COVID-19PAL framework (see Figure 2) for managing COVID-19 within a manufacturing environment comprising of a population of approximately 29,000 employees. The COVID-19PAL framework consists of three main parts, (a) protocols and processes, (b) analytics, and (c) leadership. The following sections are organized to discuss each of these aspects in sufficient detail to allow the reader to understand and replicate relevant portions accordingly. The case of interest is introduced to allow for a better understanding of the context.

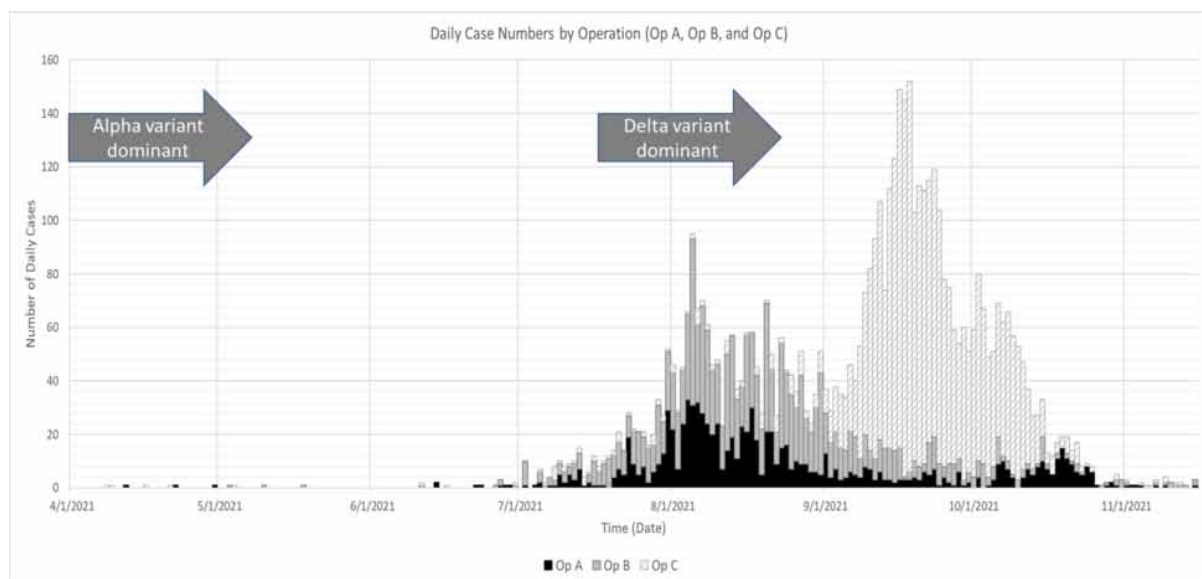
The Case and COVID-19

The case of interest is a multi-national manufacturing company with a total employee population of approximately 29,000. The company is situated in Thailand with facilities in two provinces. As such,

each facility is subject to local regulations (per Ministry of Foreign Affairs, 2021) during the COVID-19 under the Emergency Decree (TAT Newsroom, 2021c) declared.

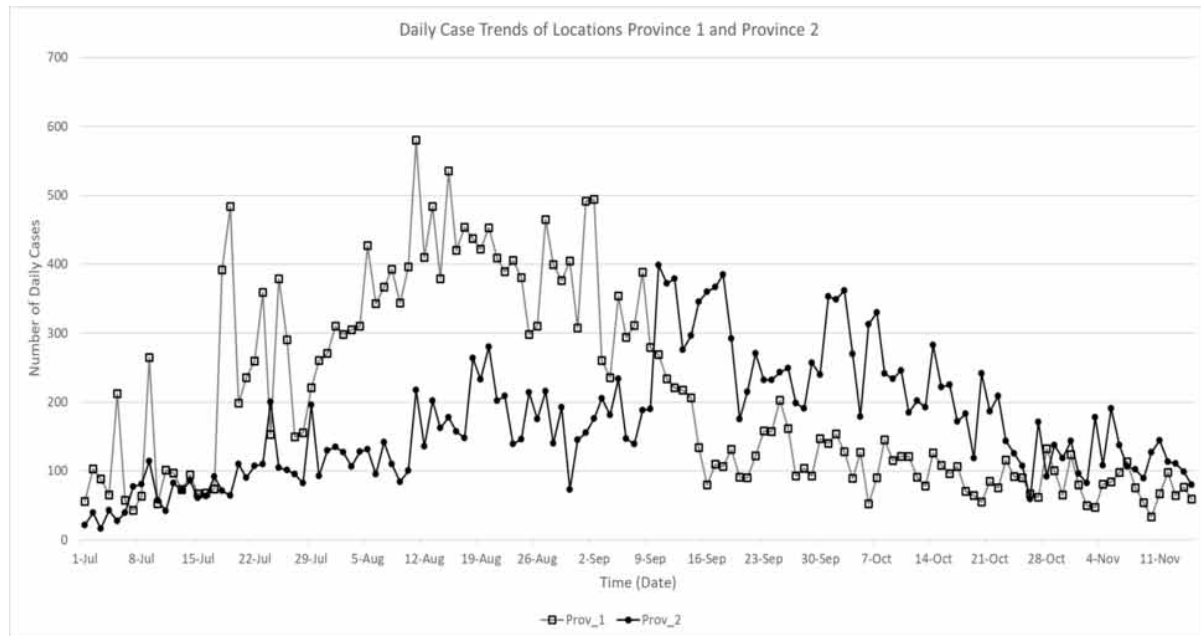
Although the first case of COVID-19 in Thailand surfaced in January 2020, the first confirmed case of COVID-19 in the case surfaced almost a year later in January 2021. Though the case survived the first and second waves of COVID-19 in Thailand without incidence, confirmed cases started emerging in the third wave of COVID-19 in Thailand. The situation followed the country's COVID-19 trend shown in Figure 1. The number of confirmed cases reported escalated quickly as the Delta (B.1.617.2) variant became dominant (Thanthong-Knight, 2021), as shown in Figure 3.

Figure 3. Stacked histogram showing daily COVID-19 confirmed case numbers reported within the case since the beginning of the third wave of COVID-19 in Thailand; graph is first author's own generated from internal report



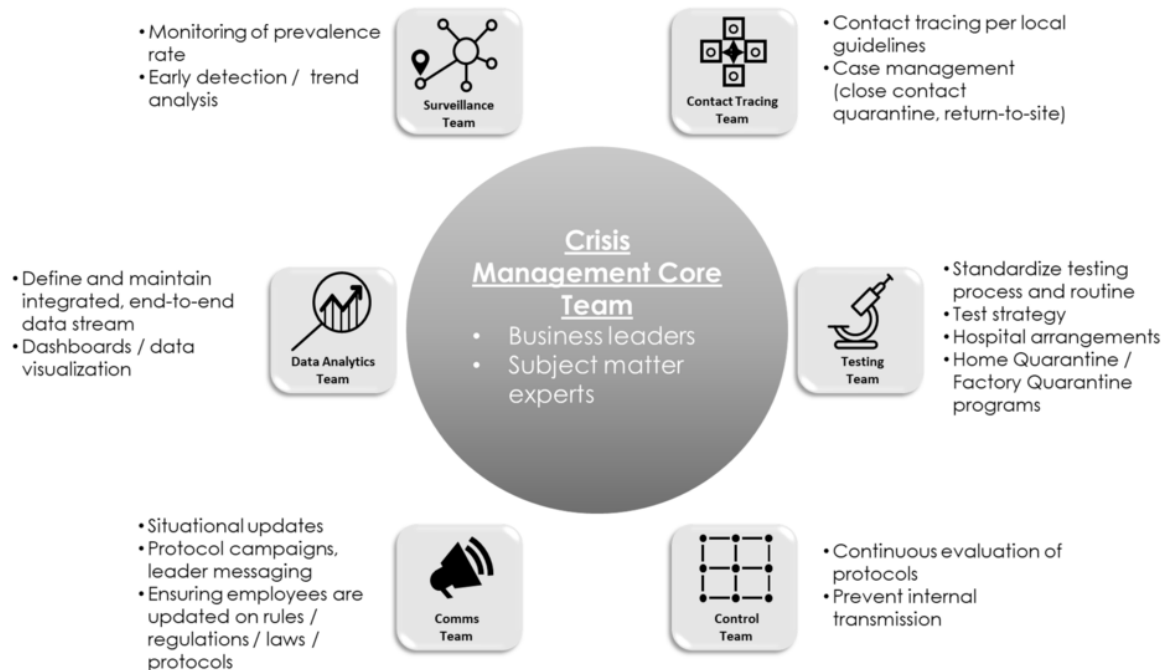
As can be observed from Figure 3, there were two 'waves'; Op A and Op B were co-located at a site in province 1, while Op C was located at a different site in province 2. This was also observed in the case trends of the provinces as shown in Figure 4; province 1 showed higher daily case numbers in the same period during which Op A and Op B reported cases and province 2 showed higher daily case numbers in the same period during which Op C reported cases. Although it was observed from case management data that the initial cases reported were linked to family and friends outside of the workplace, internal (workplace) transmission soon followed.

Figure 4. Daily case trends of Province 1 (where Op A and Op B are situated) and Province 2 (where Op C is situated); graph is first author's own generated from daily government reports



As McKee (2021) and Virakul et al. (in press) pointed out, an effective crisis management team needed to be organized in order to deal with the risks and uncertainties of the COVID-19 pandemic. Although human resource professionals are often expected to be the ones involved in crisis management in a pandemic, an effective crisis management team for the case comprised of several functions besides human resources. Figure 5 shows a schematic of such a structure that was adopted for the crisis management team. A crucial part not to be underestimated is the mindset of each person partaking the roles (Trachsler & Jong, 2020).

Figure 5. A schematic representation of critical teams constituting support to the core crisis management team



COVID-19PAL: Protocols and Processes

The centerpiece of an effective strategy for dealing with the COVID-19 pandemic is the system of protocols and processes put in place to address ‘gaps’ that could result in the transmission of COVID-19 on the premises. Ensuring employee safety in an environment where ‘working from home’ is not possible requires a system of practices. A critical concept to grasp for any infectious disease is ‘contact’; interaction between two individuals at a close proximity (such as talking, eating, etc.), as well as interaction with the environment (such as touching the doorknob, pressing a switch, etc.). A related concept is following the trail of ‘contact’, otherwise known as ‘contact tracing’ or when digital technology is involved, known as ‘digital contact tracing’ (Colizza et al., 2021; Kleinman & Merkel, 2020). Hence, protocols and processes need to be designed around (digital) contact tracing.

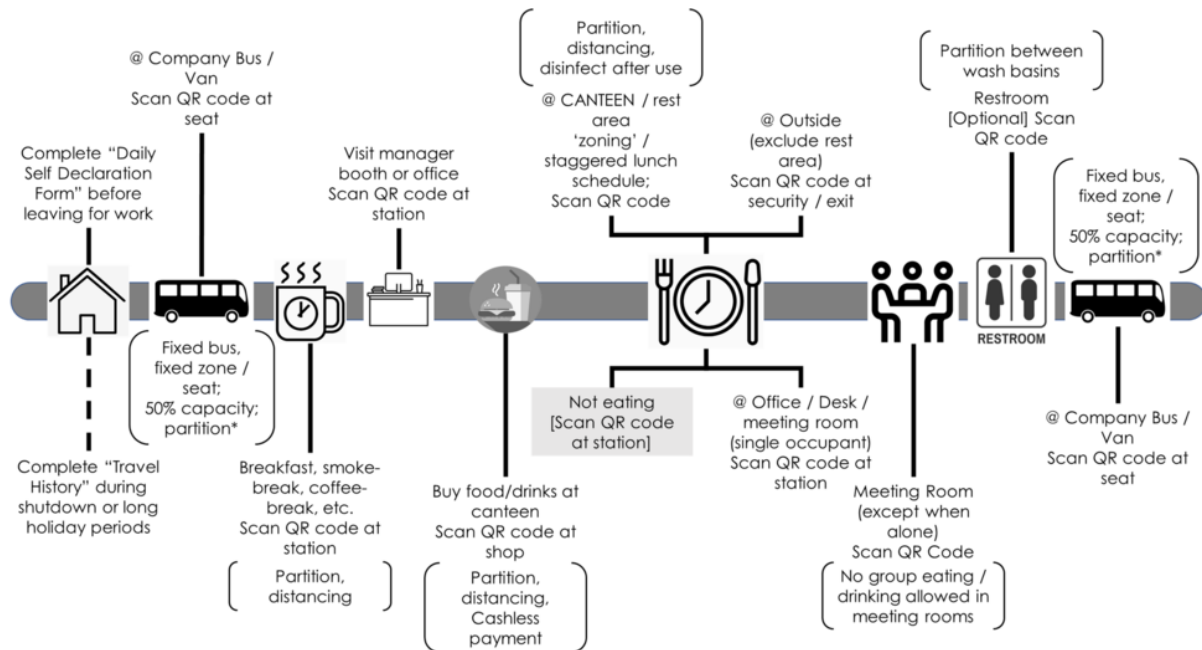
Readers are reminded that as ‘contact tracing’ relates to an individual’s information, personal and data privacy issues must be addressed before deployment. Data and health privacy laws, such as General Data Protection Regulation, the Health Insurance Portability and Accountability Act of 1996, and Personal Data Protection Act (2019), govern disclosure of information and thus must be addressed accordingly (Abeler et al., 2020). This is usually addressed by the system owners in collaboration with the legal department and human resources department in most organizations.

A multitude of interventions is needed (Jefferson et al., 2008) and the combination should be built around the daily life and life-style of individuals and people around them. Therefore, it is appropriate to begin the discussion with protocols around the employees’ daily life cycle.

Employee Daily Life Cycle

The protocols around any employee's daily life cycle are summarized and shown schematically in Figure 6. The protocols begin as the employee begins the day by filling out the daily self-declaration form and continues throughout the day. Employees working from home or on a scheduled day off are still required to fill out the daily self-declaration.

Figure 6. Schematic representation of COVID-19 protocols around the daily life cycle of an employee



The protocols illustrated are in addition to basic D-M-H-T-T (TAT Newsroom, 2021b) protocols initiated by the Thai government, namely,

- **D – distancing;** keeping a minimum distance of one-and-a-half meters (approximately five feet) from the next individual (Chu et al., 2020; MacIntyre & Wang, 2020). In addition, partitions are also installed at wash basins in restrooms, seats at rest areas, meal tables at the cafeteria (canteen), office workstations, production workstations, bus seats, and wherever possible to 'isolate' individuals.
- **M – mask or facial covering;** wearing facial coverings as required by law and double-masking when in high-risk area such as markets and shopping malls (Felter & Bussemaker, 2020; Gandhi & Marr, 2021; Masks4all, 2021; TAT Newsroom, 2021a).
- **H – hand hygiene;** washing hands frequently either with soap and water or alcohol gel (Aiello & Larson, 2002; Friedrich et al., 2017; Kwok et al., 2015).
- **T – temperature monitoring;** measuring body temperature at least twice a day and setting up thermal scanners at entrances to buildings. There are thermal scanners installed at all entrances to all

facilities of the case. Thermometers were also provided to employees to allow them to measure and monitor their body temperature before coming to work.

- T – ‘Thai Chana’ application; scanning of quick response (QR) codes to register presence at a location to facilitate contact tracing. As illustrated in Figure 6, QR codes are installed at workstations, rest areas, cafeteria meal stations, bus seats, meeting rooms, restrooms and all identifiable locations.

The protocols (as shown in Figure 6) continue to be communicated to employees on a regular basis. Employees in turn provided important feedback (such as hand-washing points needed, damaged QR codes, deviations from protocols, additional protocols, observations, etc.) for improvement. In this way, employees were also participating in safeguarding the workplace and maintaining trust towards leadership.

People Segregation

Maintaining a (social) distance of more than one meter (or even two meters) to reduce transmission may not be sufficient (Feng et al., 2020; Rosti et al., 2020; Schroter, 2020). Moosa (2020) raised the importance of reducing social interaction as part of social distancing; a salient point that could be overlooked. Therefore, workflow separation and zoning (Chen et al., 2020; Hu et al., 2020) and ‘work bubbles’ (Shaw et al., 2020) were created where possible to protect higher risk individuals (e.g. unvaccinated, employees with medical conditions, etc.).

Zoning

Sitting arrangements at common areas such as bus transportation and cafeteria were ‘zoned’ or ‘mapped’ to specific employees. For example, employees who utilized the company’s bus transportation service were assigned to a specific bus (plying a specific route) and sitting zone on that bus. Each bus was ‘divided’ into three zones of eight persons each (accommodating a total of 24 passengers) in order to meet the social distancing requirements. This was to minimize contacts; should a confirmed case be reported amongst the group, the contact tracing list would be limited to that group of eight individuals. If fixed seats were implemented, the contact tracing will further limit to three other individuals by social distancing rules (that is, one in front, one at the side, and one behind the case). Similarly, the cafeteria was ‘zoned’ by department and workgroup. The ‘zoning’ arrangement also required mealtimes to be staggered. This also resulted in the minimizing of contact with others when going to the cafeteria.

People segregation was also implemented at the workstations where teams were assigned specific work-flow routes, entry and exit routes, rest areas and restrooms. Contacts between teams were limited to assigned pairs so that contact tracing would be limited to assigned pairs in an eventuality of a confirmed case.

The situation encountered in Op C (see Figure 7) saw a rapid spread of COVID-19; cases tested positive within three to five days of being infected. An important extension of people segregation that helped curb the rapid spread was ‘bubble and seal’.

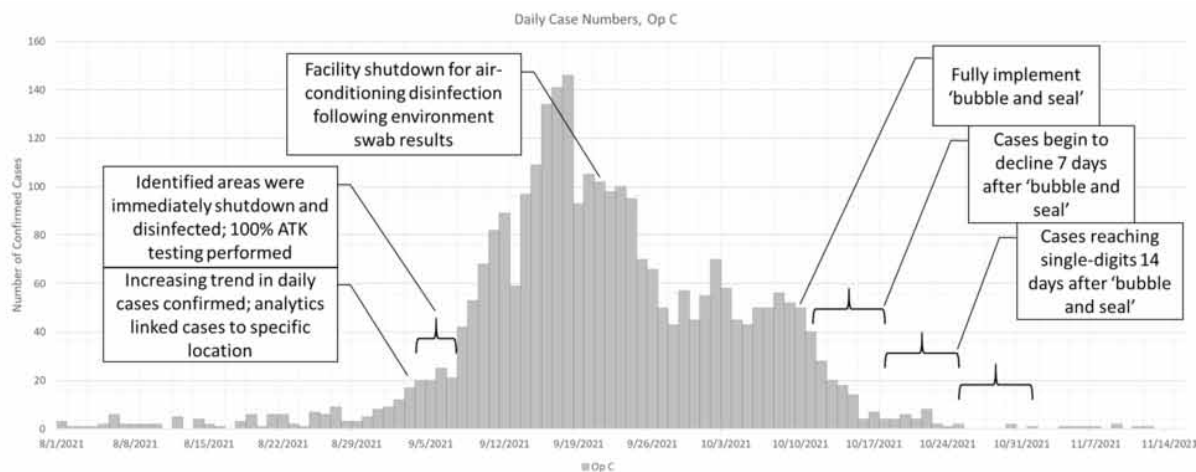
'Bubble and Seal'

The term 'bubble' took on a different meaning amidst lockdown strategies around the world to curb the spread of COVID-19 (Appleton, 2020; Trnka & Davies, 2020). In Thailand, 'bubble and seal' became a strategy for manufacturing companies (NNT, 2021) to contain the spread of COVID-19; the objective of 'bubble and seal' is to isolate the 'high-risk' group from the community and vice-versa.

'Bubble and seal' also meant isolating 'high-risk' persons from their family and friends. The most direct method of 'bubble and seal' was to house all employees on a company's premises for a period of time (usually 28 days). However, this presented a challenge to larger scale companies and those who do not have areas that can be converted into dormitories. In addition, the risk of an undetected infection being brought into the dormitories could result in a cluster at the dormitory itself. An alternative was home quarantine. This was challenging if the employee lived with family or friends as it was difficult to isolate (that is, having separate living space for each individual, not eating meals together, etc.) from others dwelling in the same space. The solution was for the company to provide living space to employees who could not isolate from family and friends at home. Isolation at home was known as 'home quarantine' and isolating at living spaces provided by the company was known as 'factory quarantine'.

The 'home quarantine' and 'factory quarantine' was a program the case adopted in order to curb the spread of COVID-19. As observed from Figure 7, it was not until 'bubble and seal' was fully implemented that cases declined to manageable levels; case numbers declined to single-digits 14 days after 'bubble and seal' began. The 'bubble and seal' also saw local government authority partner to conduct audits and home visits to ensure absolute isolation was possible.

Figure 7. Daily case number trend reported at Op C location at the peak of the COVID-19 crisis



Other key protocols that helped curb the spread of COVID-19 will be discussed in the next section.

Environment Monitoring and Testing

Mass Screening: Rapid Antigen Testing

At the confirmation of an increasing trend (see Figure 7), mass screening using antigen test kits (ATK) was conducted. As studies demonstrated (e.g. Kahanec et al., 2021) and scholars opined (Dinnes, 2021), the use of rapid antigen testing brought about fast detection but could also present a false sense of security. As in the case of Op C, the mass testing quickly identified a cluster related to the initial outbreak. However, the mass testing was not able to identify a large enough ‘infected group’ to be quarantined and the spread continued. The positive cases identified using rapid antigen test had to be confirmed via reverse transcription polymerase chain reaction (RT-PCR) test per local health authority regulations, which took additional time. Contact tracing continued while waiting for confirmation results.

Disinfection

A standard protocol adopted during the past 18 months of COVID-19 was surface disinfection at locations where a confirmed case has been at during the past 72 hours (Chen & O’Keeffe, 2020). However, when COVID-19 continued to spread at Op C (see Figure 7) after multiple disinfections were carried out, it prompted consideration of other measures. A ‘surprising’ factor was discovered; environmental swabs (Borges et al., 2021; Jin et al., 2021; Razzini et al., 2020) at ceiling and air-conditioning vents tested positive for COVID-19. This prompted deep cleaning of air-conditioning systems (Kurabuchi et al., 2021) and setting up of environmental monitoring protocol (Ahn et al., 2020; Borges et al., 2021; Jin et al., 2021; Razzini et al., 2020).

Local health authorities previously proposed disinfecting a seat (for example, a seat at the rest area or cafeteria) after each use. This was regarded as resource consuming and an area disinfection every hour was instead chosen, thinking that it was sufficient. Such time-based disinfection was later determined to be ineffective effective in curbing the spread of COVID-19 in Op C; environmental accumulation of the virus was possible as evidenced by the environmental swab test result. Hence, environment testing (that is, regular swab tests of non-organic objects) was added as part of the disinfection protocol.

Ventilation and Air Flow

Literature reviewed in the prior section (see ‘Ventilation & Wells-Riley Equation’ earlier) posited ‘air quality’ as a key factor to curbing the transmission of COVID-19 indoors; there must be sufficient ‘air flow’. The use of Wells-Riley model (see equation (2) prior) enabled the evaluation of risk at indoor locations where case incidence was higher than normal within the manufacturing site. The Wells-Riley model was also used in a full review of all indoor locations at the case of interest, including restrooms, to ensure sufficient ventilation, correct air flow direction, and appropriate partitioning (Epple et al., 2021; Lelieveld et al., 2020; Lu et al., 2020; Mirzaie et al., 2021) were implemented to curb the transmission of COVID-19. Ventilation improvements were made at locations found to be insufficient in the review.

Other Preventive Measures

Copper alloys have antimicrobial properties that have been recognized (Champagne et al., 2019; Huta-soit et al., 2020; Michels et al., 2005). However, it must be mentioned that elimination of virus is not instantaneous but require a time factor that is dependent on the material selected. Nonetheless, copper alloy tapes were installed on all high touch surfaces (for example, doorknobs, elevator buttons, etc.) at the case of interest. These tapes were also replaced at regular intervals.

Vaccination

Vaccination became a primary tool against severe consequences (Bleier et al., 2021; Krause et al., 2021); over 98% of the workforce at the case of interest have been fully vaccinated according to the criteria set by Centers for Disease Control and Prevention (2021c). Empirical data from the case support that (a) vaccines prevent severe illness and deaths, while (b) not preventing COVID-19 infection. Referring to Figure 3, case escalation at Op A and Op B saw several cases admitted to ICU and several deaths occurring; vaccination just began in the same period and targeted just 45% of the workforce. When case escalation happened at Op C, 80% of the workforce were already fully vaccinated and no ICU admissions or deaths occurred. However, it was also noted that 75% of the confirmed COVID-19 cases at Op C were fully vaccinated; evidence that being vaccinated does not prevent infection. Nonetheless, vaccination remains a key strategy in the battle with COVID-19; booster shots are currently being deployed. Employees have reflected satisfaction and gratitude towards leadership in procuring and providing vaccines to ensure employee safety.

Protocols and processes continue to be evaluated and enhanced to safeguard employees and their family and friends under the capable charge of the testing team and control team (see Figure 5). The salient lesson learnt from dealing with the crisis at Op C could not be better summarized than from the Managing Director himself, “What protocols we have prepared since the first case in January 2021 and for the Alpha (B.1.1.7) variant was not sufficient when Delta (B.1.617.2) variant hit. We had to re-learn and rebuild” (internal all-hands meeting, November 5, 2021).

COVID-19PAL: Analytics

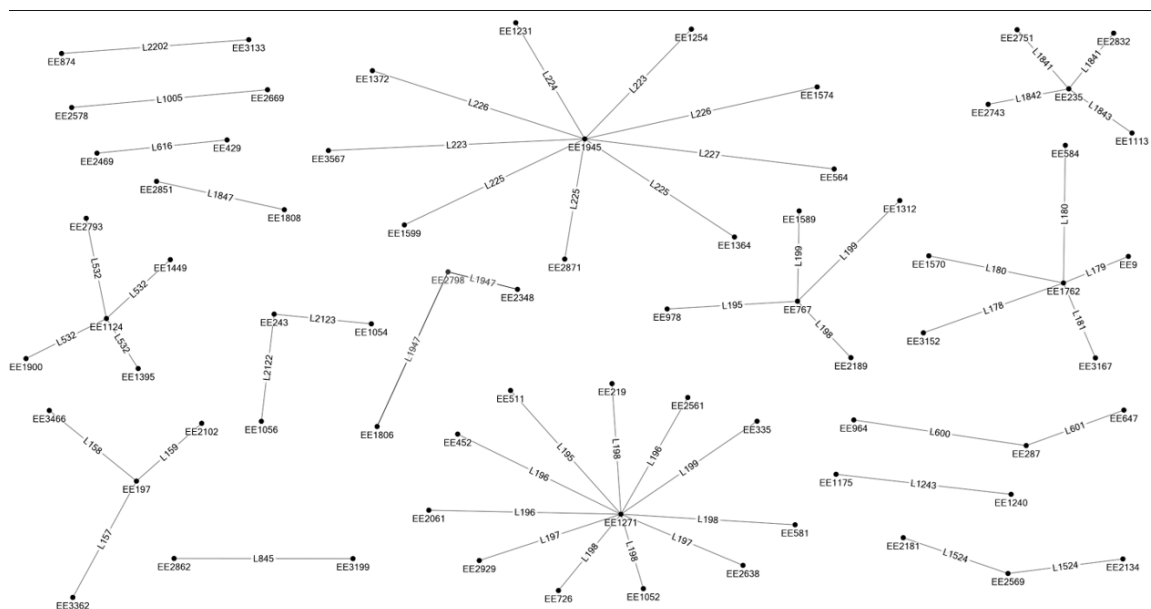
The second element of the COVID-19PAL framework involved data analytics to inform decisions to be made. The analyses demonstrated how literature reviewed prior came to live in the case of interest. The analyses also demonstrated value of human resource development and capability during a pandemic.

Social Network Analysis

The use of social network analysis to illuminate the relationships between actors (Hatala, 2006; Lumley et al., 2021; Y. Wang et al., 2021) aided in surfacing COVID-19 risk situations within the protocols implemented at the case of interest. Figure 8 shows an example of one such analysis. Protocol required employees (refer to Figure 6) to scan QR codes where they are seated but it was assumed that employees will not change seats during the journey. Relationships were not intuitive when data was presented in a tabulated form by the data analytics team and surveillance team (per roles shown in Figure 5). The picture that employees were changing seats (for example, EE1945 was linked to EE1599, EE2871, and

EE1364 via seating code L225; EE1271 was linked to EE219, EE726, EE1052, and EE581 via seating code L198) only came to light when the data was plotted using a social network analysis platform. An average bus journey was about 90 minutes and it was perhaps habitual (and expected) for some employees to be changing seats during the journey. This prompted the change to ‘zoning’ in order to limit ‘contacts’ onboard bus transportation. The same technique also allowed constant monitoring of the situation; leaders were able to use the data to remind employees to stay within their assigned ‘zone’. This visualization also enabled human resource professionals to assist organization leaders shift their paradigm on the concept of ‘contact’ in the context of ‘social distancing’.

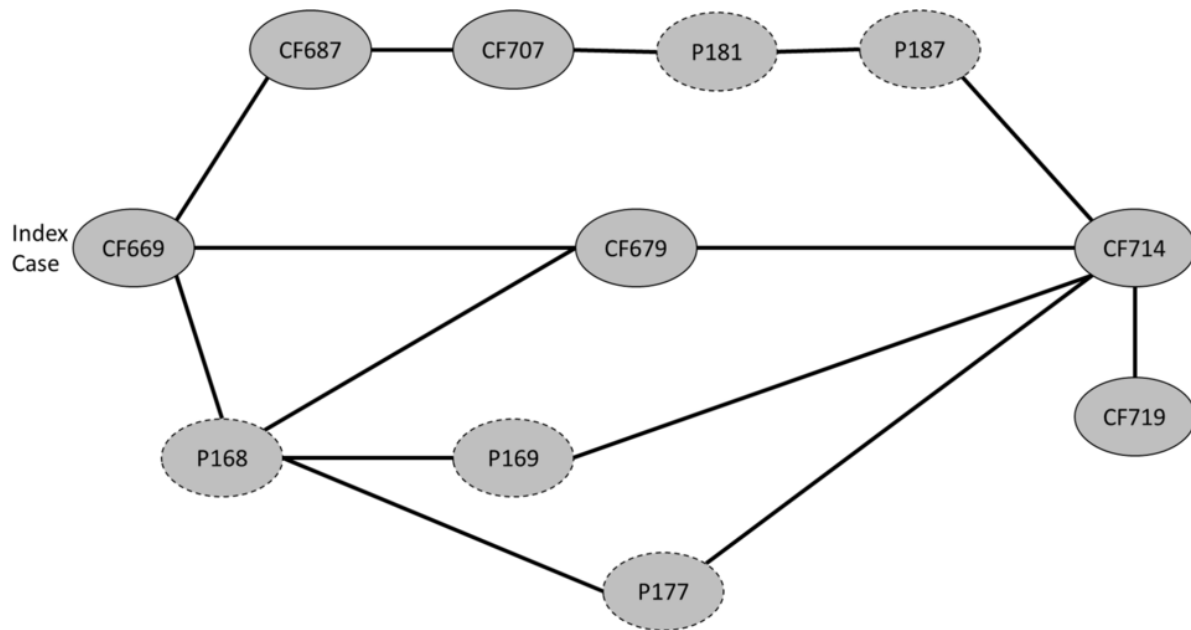
Figure 8. Sociogram representing relationship between actors sitting close (within contact tracing rules) on board a bus service (single service); data visualized using NodeXL (Smith et al., 2010)



As confirmed cases surfaced, case interviews were conducted to ascertain close contacts. However, it may not be easy to detect linkages between cases. The second application of social network approach was aiding case investigations and contact tracing. The relationship between cases was visualized via a simple sociogram constructed from case interview and contact tracing; see Figure 9. A first glance would suggest a case of internal transmission of COVID-19, but actors were not colleagues working in the same area. The case interview of ‘CF714’ (see Figure 9) revealed the employee caught the infection possibly at a party. This implied that other actors could have also attended the gathering. It was only when this was revealed in further interviews that it was confirmed a private gathering took place. It also revealed a duo belief that actors have – that it was ‘safe’ with certain groups while not with others – which resulted in selective conformity to protocols; a manifestation of social identity (Drinkwater et al., 2021; see Swire et al., 2017 as well). Such details would not have been naturally surfaced under normal circumstances (a challenge in contact tracing). The social network approach thus enhanced contact tracing outcome by narrowing contact tracing gaps.

A different application of social network approach, with consideration to social identity approach and adult attachment style reviewed prior, will be discussed in a further section (see COVID-19PAL: Leadership).

Figure 9. Simple sociogram constructed from contact tracing and case interviews. Prefix 'P' represented probable cases and prefix 'CF' represented confirmed cases. The probable cases were all 'confirmed' via RT-PCR later



The next section focuses on some means of looking head (practitioners may use the word 'predicting') of the number of confirmed cases based on what is observed over time.

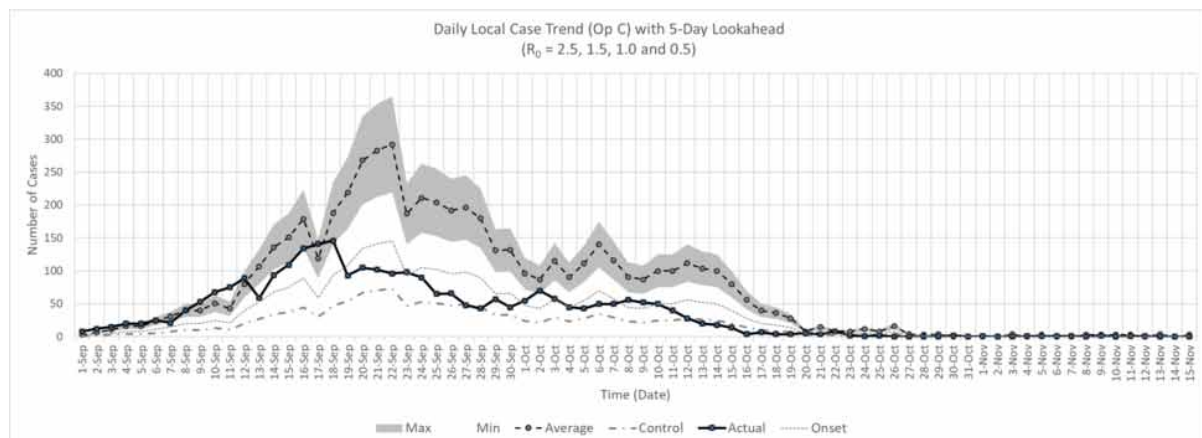
'Looking-Ahead' on Number of Confirmed Cases

A constant question (sometimes a challenge) faced by human resource professionals dealing with the COVID-19 pandemic was determining if actions taken were sufficient and effective. The ability to offer some form of answer was also important to employees. An important aspect often taken for granted was that confirmed cases detected today were exposed anywhere between three to five days prior, possibly up to 11 days (Centers for Disease Control and Prevention, 2021a). Some tended to think that cases happened as they were reported, neglecting the exposure period and the possibility that transmission has taken place prior to cases testing positive for COVID-19. Contact tracing procedures implemented at the case called for identifying close contacts up to 14 days prior to confirmation of infection (assuming immediate quarantine while awaiting confirmation RT-PCR results). The number of close contacts offered an indication of the potential number of confirmed cases forthcoming. However, this was indicative of internal transmission but offered no overall indication of the case trend or performance 'looking ahead'.

A ‘look ahead’ trend plot was developed to provide a means to compare actual cases with projections to establish status and to aid planning; Figure 10 shows an example of such a ‘look ahead’ trend plot. Essentially, the plot projects the potential number of cases five days (assumed incubation period; see Nah et al., 2014; Yu et al., 2019) into the future based on daily reported cases. Components of the graph include,

- ‘Maximum’ growth rate assumed to follow reproduction number, $R_0 = 2.5$; that is, for every confirmed case reported, there will be 2.5 cases infected further, indicating (rapid) increase in cases.
- ‘Minimum’ growth rate assumed to follow reproduction number, $R_0 = 1.5$; that is, for every confirmed case reported, there will be 1.5 cases infected further, indicating (moderate) increase in cases.
- ‘Onset’ of growing trend assumed to follow reproduction number, $R_0 = 1.0$; that is, for every confirmed case reported, there will be one case infected further, indicating a constant number of cases.
- ‘Control’ trend assumed to follow reproduction number, $R_0 = 0.5$; that is, for every confirmed case reported, there will be 0.5 cases infected further, indicating abatement of COVID-19 spread within group.

Figure 10. Case trend ‘look-ahead’ and indication of curbing the spread of COVID-19



The area bounded by ‘maximum’ and ‘minimum’ growth rates (gray color area presented in Figure 10) represents a possibility of ‘increasing’ trend. The following scenarios were of interest, namely,

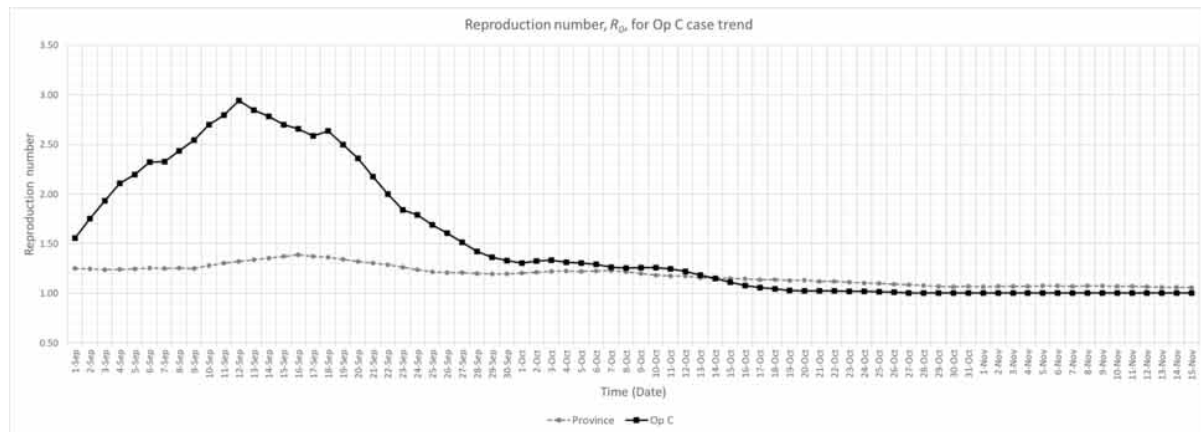
- If the current case number fell within the gray area, it was expected that COVID-19 continued to spread at an increasing rate. This triggered a discussion to tighten existing preventive measures.
- If the current case number fell between the ‘minimum’ growth (lower edge of gray color area) rate and ‘onset’ trend line, it was expected that COVID-19 continued to spread but at a constant rate. This triggered a discussion to evaluate existing preventive measures but may only require reinforcement communications.

- If the current case number fell between the ‘onset’ and ‘control’ trend lines, it was expected that COVID-19 was brought under control and case trend began to decline. However, was essential to continue to motivate efforts in curbing COVID-19 and not to relax in terms of preventive measures.
- If the current case number fell between ‘control’ trend line and zero, it was expected that COVID-19 cases were under control and would eventually decline to zero or low single digits daily. While this signaled success in curbing COVID-19, it was suggested that existing measures be maintained for another 14 days and a further review of preventive measures at that time.

The reader is reminded that the trend lines were plotted based on a ‘forward-looking’ basis to provide an ‘expected outcome’ perspective. Figure 10 was not meant to predict the actual reproduction number, which could be calculated and graphed otherwise; see Figure 11 instead.

It could be seen from Figure 11 that the peak reproduction number reached an approximately value of three around 12 September 2021. As the reproduction number declined, the actual case numbers were seen to fall below the calculated ‘expected’ numbers (refer to Figure 10), indicating a decline in spread of COVID-19. The reader should be aware that the reproduction number calculated using equation (1) has an inherent limitation in that it is only suited for calculating increasing trends and not suited for calculating declining trends. Secondly, the calculated number will have a minimum number of one, which did not represent declining cases of values between zero and one. Nonetheless, this was still useful in practice.

Figure 11. Corresponding reproduction number, R_0 , for the case in Figure 9 over the same period of time as compared to the calculated reproduction number for the province; values calculated using equation (1) reviewed in a prior section



This section has thus far looked at cases from at micro (individual case and case linkages) and meso (organization case trend over time) levels. The next section illustrates a technique that could be applied at meso and macro views of case trends.

Gaussian Approximation of Case Trends

Given that COVID-19 followed a susceptible-exposed-infected-recovered/removed (SEIR) epidemiology model, case trends could be approximated using a Gaussian function (Barmparis & Tsironis, 2020). The case of interest used the Gaussian function (refer to equation (4) prior) to approximate case trends. In some instances, the approximation was able to offer some form of ‘look-ahead’ on a short-term basis.

Scholars have been modeling and predicting the initial waves of COVID-19 in Thailand (see Mahikul et al., 2021; Tantrakarnapa & Bhopdhornangkul, 2020; Wongsathan, 2021). In the third wave, Thailand witnessed case numbers rising quickly. By the middle of July 2021, several predictions about when Thailand’s third wave could end surfaced (e.g. Macroeconomic Team, 2021); the third wave was to peak in August with an outlook that there will be less than 1,000 cases per day by November 2021. ‘Prediction’ and ‘modeling’ were common questions asked in the hope that something be done in response (Ly, 2021). Hence, it was no surprise when employees asked for a ‘prediction’. However, instead of complex models and mathematics, the first author decided to demonstrate a simpler method using Gaussian approximation. Figure 12 shows three possible outcomes based on different Gaussian approximation functions applied to the actual number of confirmed cases reported in Thailand. It was later established that the actual case trend followed the ‘most likely case’ Gaussian approximation curve quite well; see Figure 13. Sub-cycles could also be modeled by Gaussian approximation as seen in Figure 13.

Figure 12. Thailand daily case trend ‘prediction’ using Gaussian approximation function (see equation (4) discussed in earlier section)

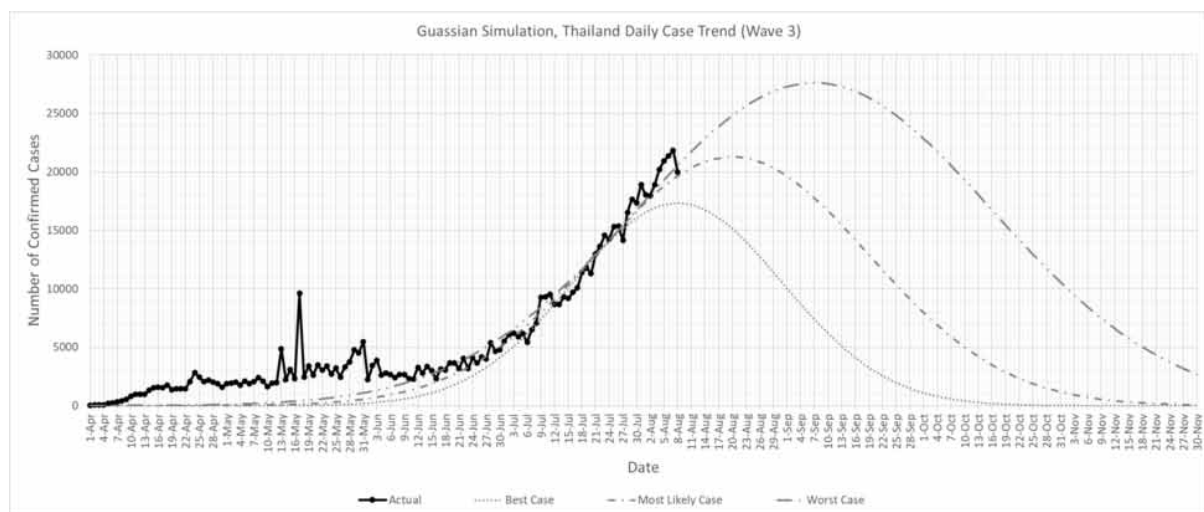


Figure 13. Gaussian approximation function applied to daily confirmed case trend in Thailand



The application of Gaussian approximation to the daily case trend also allowed a study on the time period associated with each of the sub-cycles; a peak-to-peak time period of approximately seven days could be observed. The dispersion, σ_p , applied to equation (4) in Figure 13 averaged 4 days, which is close to the “4.4 days (95% confidence interval: 3.9-5.0) incubation period” (Zhang et al., 2021, p. 584) of the Delta (B.1.617.2) variant reported.

The micro-meso-macro analytical view of COVID-19 case numbers have been discussed so far. Other essential analytical views include elements of the workplace environment (i.e., risk of infection, incident rate) are explained below.

Risk of Infection: Scenario Study of Indoor Workspaces

It has been recognized that respiratory transmission as being one of the modes of transmission of COVID-19 (Meyerowitz et al., 2021). It was therefore appropriate to understand the risk of infection for indoor workplaces at the case of interest, especially from the perspective of wearing facial coverings and maintaining social distancing indoors. A means of providing such a view was through the well-established Wells-Riley model that was reviewed in an earlier section (see equation (2) prior). Table 1 illustrates an example of comparing risk of infections for different situations assuming an infectious participant came in contact with five others in a typical meeting room within the manufacturing facilities of the case of interest. Assumptions used in the calculations performed with equation (2) included (a), mask efficacy of 92% (Asadi et al., 2020), (b) air exchange rate of 15 per hour (average; as measured on site), (c) quanta production of 68, and (d) breathing rate of 0.51.

Table 1. An example simulating risk of infection using equation (2) for a typical meeting setting with / without facial covering (typical surgical mask), with / without social distancing using typical values from Schibuola and Tambani (2021) and Duan et al. (2015)

Indoor Space	Mask (Infected=1)	Mask (Susceptible=5)	Social Distancing (meters)	Infection Risk (%)
Meeting Room, 6m × 4m × 3m Central air-conditioning 2-hour duration 6 persons	N	N	N (0.2)	4.55
	Y	N	N (0.2)	1.39
	Y	Y	N (0.2)	0.42
	N	N	0.72	3.11
	Y	N	0.72	0.94
	Y	Y	0.72	0.28
	N	N	1.6	2.21
	Y	N	1.6	0.67
	Y	Y	1.6	0.20
	Double	Double	2.5	0.01

The risk of infection is being calculated for a typical meeting setting where the main activity was normal breathing and speaking and everyone was sitting. The following can be read from Table 1,

- There was a 4.55% risk of participants being infected at the end of the meeting if there was no one wearing facial coverings and in close proximity (assuming 0.2 meters ‘natural’ spacing from each other). The risk reduced to 0.42% if everyone was wearing surgical mask grade facial coverings.
- The risk became 3.11% if no one was wearing facial coverings and everyone kept a distance of 0.72 meters from each other. The risk reduced to 0.28% if everyone was wearing surgical mask grade facial coverings.
- The risk became 2.21% if no one was wearing facial coverings and everyone kept a distance of 1.6 meters from each other. The risk reduced to 0.20% if everyone was wearing surgical mask grade facial coverings.
- The risk fell to 0.01% if everyone wore double facial coverings (for example, cloth mask over surgical mask) and kept a distance of at least 2.5 meters from each other and the airflow in the room increased by 25%.
- The decline in risk was relatively higher for face covering when compared to social distancing, supporting the notion that airborne transmission of COVID-19 could not be ignored.

The last entry in Table 1 was typical of tightened COVID-19 protocols implemented alongside ‘bubble and seal’ for Op C at the peak of the crisis. As mentioned in an earlier section (see ‘Disinfection’ earlier), a time-based disinfection protocol led to a rapid escalation in cases at Op C. Further investigation also pointed out that social distancing between seats was less than 1.5 meters, although each seat had plexiglass barriers installed on three sides (left, right and back) of each seat. The number of occupants in the room increased during that period but ventilation was not adjusted higher with the higher occupancy rate. All factors being considered, it was a perfect condition for the transmission of COVID-19. The environmental swab RT-PCR test turning up detectable, albeit cycle threshold of 33 being regarded as

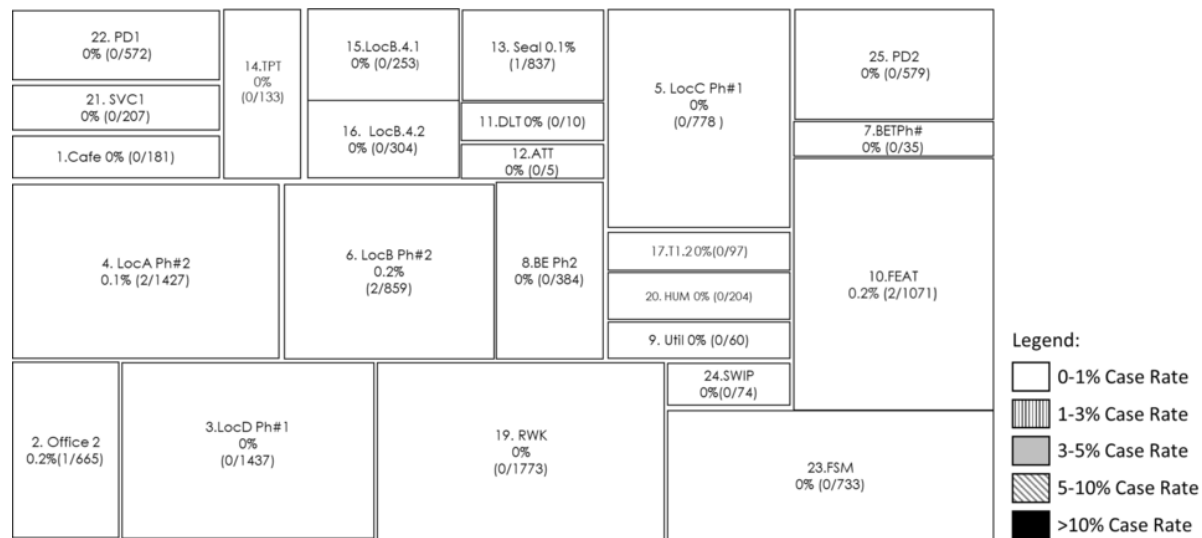
a lower risk of transmission (Al Bayat et al., 2021; Aranha et al., 2021; Boretti, 2020), was a surprise. The tightened protocol henceforth required double-masking, increased ventilation by 25% and social distancing of at least 2.5 meters.

The next type of monitoring established was the incidence rate per organization – the fraction of employees within an organization that became infected (Clark & Turner, 2021) over a rolling period of 14 days.

Incidence Rate Monitoring for Workgroups

The number of employees within a workgroup that have not yet been infected would be at risk of being infected either by family members or friends or a colleague. Simply looking at the number of employees becoming infected or the incidence rate (Clark & Turner, 2021) indicated how quickly COVID-19 was spreading at a location. The incidence rate for each department within the company was visualized into a grid map as shown in Figure 14. The color code for each department changed according the incidence rate recorded. As the incidence rate increased, actions listed in Table 2 are triggered for that organization accordingly.

Figure 14. Grid map showing incidence rate for each department (coded names used to preserve confidentiality) and case numbers reported within a rolling 14-day period. Grid color changes to reflect case incidence rates and corresponding actions are triggered



For example, if a group recorded an incidence rate of 1.5% in the current rolling 14-day period, the representation in the grid map shown in Figure 14 will be changed to the color code representing ‘1-3% case rate’. The actions to be immediately taken followed that listed in Table 2. For example, for an incidence rate of ‘1-3%’, actions included (a) area disinfection according to disinfection protocols for COVID-19, (b) contact tracing to find all close contacts, (c) RT-PCR testing for all close contacts traced, and (d) quarantine of all close contacts for 14-days.

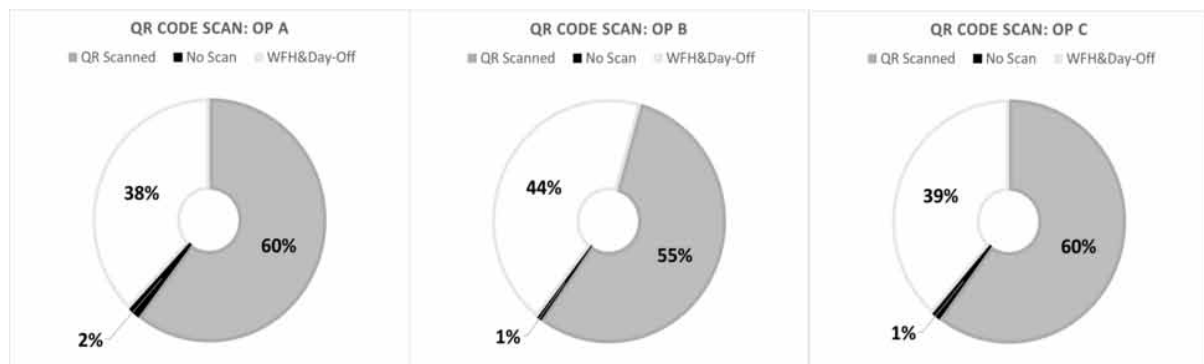
Table 2. List of actions taken according to incidence rate recorded for each organization; incidence rate calculated based on number of uninfected but at-risk employees (Clark & Turner, 2021) becoming infected in a rolling 14-day period

Incidence Rate (%)	Actions
0% to 1%	Area disinfection, contact tracing with RT-PCR testing
1% to 3%	Area disinfection, contact tracing with RT-PCR testing + 14 days quarantine
3% to 5%	Workstation shutdown for three days, deep cleaning applied, contact tracing with RT-PCR testing + 14 days quarantine
5% to 10%	Area shutdown for three days, deep cleaning disinfection applied, rapid antigen testing for sub-group members (working in close proximity)
More than 10%	Area shut down for three days, deep cleaning disinfection applied, rapid antigen testing for all members of the group

Other dashboard indices have also been setup to send automated messages to managers and supervisors of employees. These included, (a) fraction of organization completing self-declaration daily, (b) fraction of employees who came to work with COVID-19 like symptoms (see Centers for Disease Control and Prevention, 2021b for list), (c) fraction of employees who scanned QR codes on bus transportations, and (d) fraction of employees on-site who scanned QR codes (at least once per day). While Figure 6 provided an overview, these selected indices helped visualize performance of the implemented protocols; Figure 15 shows an example illustration of the overall QR code scan status being monitored.

As seen in Figure 15, there was one to two percent of employees who were not scanning QR codes. The dashboard provided a detailed breakdown by department so that department leaders could remind their employees of the importance of QR code scans. At the same time, the department leaders could show their appreciation to their employees for supporting the necessary efforts to keep everyone safe. There were also between 38 percent to 44 percent of employees who were either working from home or on their day off. The focus was on the 55 percent to 60 percent employees on-site, whom should be traceable at locations they have visited.

Figure 15. Sample illustration of QR code overall scan status being monitored on dashboard



These indices were critical as contact tracing was predicated upon completeness of available information – where employees were sitting on buses and who were in close proximity, where employees were sitting in the cafeteria and who were using the same stations after, who visited which meeting room or workstation, etc. As the contact tracing system of the case of interest was designed around QR codes, it was therefore important to ensure employees continue and diligently scan QR codes as defined in protocols (refer to Figure 6). The success in tracing and isolating all close contacts to a confirmed case quickly resulted in the success of curbing the spread of COVID-19 at the case of interest.

The next section expands on the last element of the COVID-19PAL framework, leadership.

COVID-19PAL: Leadership

The success of preventive measures curbing the spread of COVID-19 laid partially with the ability to convince employees to comply with protocols. While it was an employee's responsibility to gain health literacy for self-protection (May, 2005; Paakkari & Okan, 2020), it was the employer's responsibility to provide a healthy and safe workplace, and the leader's ability to mobilize "a sense of shared social identity among them (a sense of 'us-ness')" (Haslam et al., 2021, p. 35). COVID-19 definitely has struck fear (Ahorsu et al., 2020; Pakpour & Griffiths, 2020), but successful preventive measures have also alleviated fear (Pakpour et al., 2021). Communicating the dashboard indices (see example in Figure 15) allowed employees to see that everyone played their part to keep the workplace safe. This was critical in sustaining the effort in curbing the spread of COVID-19, as well as building the trust that employees can come to work.

The social identity also presented a critical factor that could lead to escalating cases – the perception of lower risk when one identifies closely with a group, as in the case of family and friends (Cruwys et al., 2021; Cruwys, Stevens, & Greenaway, 2020; Cruwys, Stevens, Platow, et al., 2020; Jetten et al., 2020b) – and consequently spreading COVID-19 through the shared space of family and friends (Salihefendic et al., 2021). A perception of lower risk could result in greater risk taking (Cruwys, Stevens, & Greenaway, 2020) – a phenomenon that was observed frequently from case investigations where employees who normally complied strictly with COVID-19 protocols at the workplace immediately stopped complying upon reaching home, and subsequently became infected by a family member. It was therefore essential to craft communications that conveyed to employees that their family and friends were an extended part of the organization in the face of COVID-19 (Jetten et al., 2020a).

Thailand's third wave saw rapid transmissions; the case of interest being discussed saw a rapid uptick of cases. The first author played a critical role on the crisis management team as the company's human resource leader and as an executive management team of the case of interest. The first author was also interested in understanding social behavior within the case and thus engaged with the second author in a small study conducted at Op B and Op C. The data collected from the study exhibited possible impact due to COVID-19 and COVID-19 protocols. The research drew primarily from social identity approach and adult attachment style, both of which provided insight to behaviors observed during the COVID-19 pandemic (e.g. Bavel et al., 2020; Haslam et al., 2021; Marčinko et al., 2020; Parent et al., 2021). A question asked was 'I often think about the fact that I am part of a group with ...' and the request was for the participant to respond back with a list of persons in relation to the question. A sub-graph from the sociogram constructed from responses is shown in Figure 16.

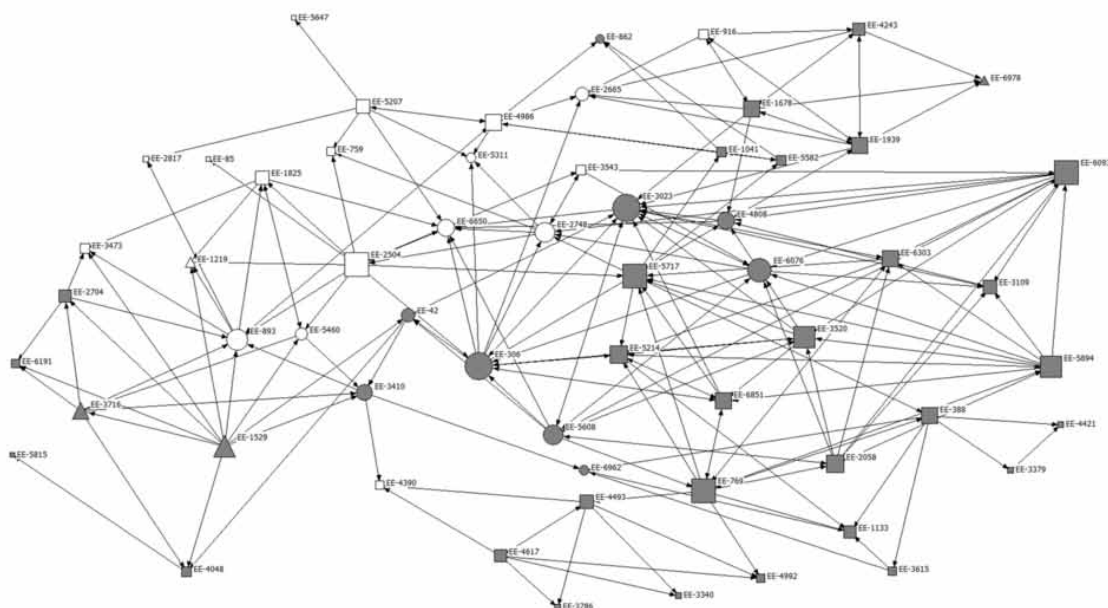
The nodes shown in Figure 16 represented actors who were participants and named actors in the research. The node colors represented work locations – white for Op C and gray for Op B. The node shapes

represented job types – rounds for management, squares for individual contributors and triangles for supporting roles. Finally, the node sizes represented the number of connections observed. The grouping of the colored nodes – white versus gray – stood out as an initial interpretation of the graph.

In normal working situations, actors in this organization traveled to meet face-to-face with counterparts; employees from Op B visited employees from Op C and vice-versa. With COVID-19, travel between sites were no longer allowed; face-to-face interactions reduced significantly. Majority of the employees were also working from home to reduce social interaction in a bid to curb the spread of COVID-19. COVID-19 people segregation protocol also restricted employees to have meals and breaks with members within the organization whenever working on site. It was expected that the connection between different colored nodes to be more mixed than what was presented. However, going back to the psychological responses, as explained from the perspective of social identity approach and attachment style, a different insight surfaced. Engaging and motivating employees, navigating uncertainties brought about by COVID-19, and general well-being (e.g. Carnevale & Hatak, 2020) and mental health due to isolation (Marmarosh et al., 2020; Yip & Chau, 2020) was more challenging. Compliance to protocols at the workplace could actually have driven a different, possibly opposite, behavior at home (Breakwell & Jaspal, 2021; Eder et al., 2021; Marmarosh et al., 2020).

It was possible to look at the structure (context) by looking at the relationship that was discovered through a mapping using information solicited from actors in the group (Burt, 1982). The degree, which was how each node in Figure 16 was sized, indicated how connected an actor was with other actors in the same group (Wasserman & Faust, 1994). In other words, the degree indicated ‘influence’ of that actor within the group (Metcalf & Casey, 2016). In a situation such as COVID-19, it was important to connect with ‘influencers’ to aid communications, particularly recognizing that these ‘influencers’ can help build shared identity, provide support to the group that they are well connected to, and unlock the group’s ability to deal with the crisis (Haslam et al., 2021).

Figure 16. Social network constructed from responses obtained as part of a research conducted by the authors at Op B and Op C; data visualized using UCINET 6 (Borgatti et al., 2002)



Haslam et al. (2021) and Jetten et al. (2020b) provided insight to how leaders could be more effective in managing the COVID-19 pandemic. In particular, Haslam et al. (2021) offered 12 lessons (as listed in Table 3) for effective crisis management, all of which became foundational to how the crisis management core team depicted in Figure 5 operated. A sociogram, such as the one shown in Figure 16 offered leaders valuable insight and a means to connect to ‘influencers’ in bringing lessons number two, three, four, and nine listed in Table 3 to life.

Table 3. Twelve lessons for effective crisis management posited by Haslam et al. (2021, p. 64; see Table 1.)

Twelve lessons leaders should adopt to be effective a crisis management:
1. Achieve power through people not over them
2. Recognize groups as the solution not the problem
3. Unlock people’s capacity for strength
4. Build shared identity
5. Treat people respectfully
6. Define ingroups inclusively
7. Appreciate people’s differing needs and circumstances
8. Be empathic rather than punitive
9. Provide ongoing support to those who need it
10. Achieve outcomes that people most value
11. Prepare groups materially and psychologically for a crisis
12. Develop identity leadership rather than leader identity

According to Dovidio et al. (2020), dealing with COVID-19 came down to mobilizing and exploiting the constructive aspect of group psychology. They believed that converting the thought or an action that signaled individual belief to an attribute or representation of communal / collaborative care drew people together. Organizing sessions that allowed employees to come together to express their views and facilitating the dialogue to a common understanding brought about positive energy amongst employees for the case of interest. Provincial and operational requirements appeared to have separated the three entities, Op A, Op B, and Op C, from each other in how the entities handled COVID-19. However, organizing employees into volunteer workgroups to engage employees in quarantine or recovery (referencing village health volunteer program, see Kaweenuttayanon et al., 2021) aimed to redefine ‘we’, by (a) recognizing that risks of COVID-19 highlight the importance of coming together and acting together, and (b) understanding the issue to be COVID-19 and responding to the virus rather than difference in how protocols are executed (Dovidio et al., 2020).

During the last 18 months, it became easy to put off activities by hiding behind the requirement of social distancing or avoiding mass gathering. The rise of technology allowing for virtual events to take place enabled certain critical activities to continue. Human resources worked with departments to re-design internship programs, deploying technologies (for example, 3D printing, virtual reality, augmented reality, mixed reality, etc.) that were being evaluated into mainstream. The benefits were not just interns completing the programs but teams undertaking new ventures and exploring new ways of engaging in

meaningful work. These teams connected back to the core crisis management team and enabled analytics and different ways of connecting to the broader employee group and deploying COVID-19 protocols⁴.

FUTURE RESEARCH DIRECTIONS

As with any research, this chapter only touched on a specific context and even at a certain timeframe. As COVID-19 continues to evolve, there is a need to continue to learn from other contexts. An exchange between some scholars (e.g. see exchanges Holmes et al., 2020; Morgan & Rose, 2020; O'Connor et al., 2020; Singh et al., 2020) highlighted the need to bring together a wider group of expertise in combating COVID-19 and the need to focus on mental health and well-being in the long-drawn battle with COVID-19. The literature review section in this chapter encompassed a wide range of topics that are essential for human resource professionals, leaders and employees of organizations in mitigating the spread of COVID-19. However, this is only the tip of the iceberg; it is critical to draw into other disciplines for wisdom in formulating future COVID-19 responses. Reiterating a need for entirety of society approach (McKee, 2021; Virakul et al., in press), the authors believe that a plurality of scholars and practitioners coming together will generate research and knowledge that will bring closure to COVID-19 and equip humanity better⁵ in dealing with future pandemics. This is especially important as COVID-19 continues to evolve and new variants emerge in the future.

Thailand, as are many countries, is moving forward with re-opening borders and learning to live with COVID-19. New thinking on how to co-exist with COVID-19 have been developed; four new measures forming the acronym VUCA (PR Thai Government, 2021) – vaccination, universal prevention, COVID-free setting and antigen test kit (ATK) – offer a glimpse to life with COVID-19. Manufacturing facilities are invited to join the ‘factory sandbox’ program (Rarueysong & Brammar, 2021) – a program that will test, vaccinate, and isolate all employees of a participating factory in a bid to protect industries and job. Further research on effectiveness and coping strategies would be necessary as the future unfolds.

CONCLUSION

The objectives of this chapter are to provide insight to three questions, namely,

1. What is the risk or likelihood of the presence of an infected person within the premises?
2. What is the risk or likelihood of transmission within the premises?
3. What is a suitable response plan to ensure business continuity and how can effectiveness of the plan be measured?

The COVID-19PAL framework introduced in this chapter showcased how theoretical concepts in a multitude of disciplines, from Epidemiology (that is, reproduction number), Physics (that is, Wells-Riley model), Statistics and Modeling (that is, Gaussian approximation), to Sociology and Social Psychology (that is, social network analysis, social identity approach and adult attachment style) are combined into practical crisis management deployed at a multinational manufacturing company situation in Thailand. In applying the relevant literature in the ways discussed, the authors have provided insight into how the three questions are answered. Specifically,

- (a) The protocols and processes, analytics, and communication elements of COVID-19PAL kept the business operational throughout the COVID-19 ordeal. Although more than 10% of employees tested positive for COVID-19 and many others were quarantined, the actions prevented further spread of COVID-19 and operations continued to run without disruption from government closures. The third question is thus addressed.
- (b) Analytics deployed assisted the crisis management team to understand the likelihood of transmission within the premises while protocols discussed brought the risk of transmission to zero within the premises. The first and second questions are thus addressed.

COVID-19 is expected to continue to bring uncertainty to the world. It is the hope of the authors that further knowledge and research in the space of pandemic crisis management continue to build for research and practical application alike.

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KEY TERMS AND DEFINITIONS

Analytics: A structured process of reviewing data in a logical and detailed manner to derive meaning and understanding that would result in sensemaking.

Bubble: A condition set up to quarantine a group of actors (such as a family unit, close friends, co-workers, or workgroup) from others to prevent interaction with others, specifically to reduce the possibility of transmission of infectious disease.

COVID-19: A short name given to an infectious, respiratory disease caused by the novel coronavirus 2019 first discovered in Wuhan, China.

Isolate: Preventing an infected person (that is, someone who tested positive for COVID-19) from coming into contact with another and thereby infecting another.

Protocol: A set of rules or expected behavior designed to mitigate the risk of transmitting or being infected with COVID-19 in a business or family setting.

Quarantine: Separating a person or group of people suspected to be exposed to COVID-19 or having been in contact with someone who tested positive for COVID-19, from others.

Seal: A condition set up to isolate an actor or a group of actors to prevent the transmission of infectious disease to others.

Sociogram: A diagram illustrating the existing relationship between different actors in a specific context or setting.

ENDNOTES

- ¹ This is the reported seven day rolling average retrieved on 15 November 2021 from <https://ourworld-indata.org/covid-cases> (Dong et al., 2020); it is not a quantity calculated by the authors although the authors are tracking the daily reported confirmed cases for Thailand as part of crisis management.
- ² The authors' understanding is that the research and data presented at <https://ourworldindata.org/covid-cases> are required to be cited separately according to the website; the webpage itself is not cited.
- ³ The mathematical derivation for the basic reproduction number, R_0 , depends on the next generation matrix defined for relevant states used in modeling the transmission of COVID-19. Depending on the defined states (e.g. Tang et al., 2020) in the research, the calculation can be complex. As this chapter is not written from a mathematical or epidemiological perspective, but rather a practical application perspective, the reader seeking an accurate derivation of the basic reproduction number should consult literature such as Diekmann and Heesterbeek (2000), Diekmann et al. (2010), Gatto et al. (2020), and Heesterbeek and Dietz (1996).

- ⁴ The concept of ‘free-riding’ (e.g. Cullity, 1995; van den Hoven, 2012) has not been discussed. The existence and prevalence of this phenomenon depends on the context of the situation and may or may not manifest clearly as part of the phenomenon being researched. Hence the authors’ choice to exclude this concept in the discussion.
- ⁵ The availability of information can also be an availability of misinformation. The growth and use of technology to disseminate information speedily amplifies the effect and impact of misinformation (e.g. Zarocostas, 2020). The authors feel that this phenomenon is being researched and hence does not require a callout for future research but a callout for awareness, nonetheless.

Chapter 17

Impact of Organizational Culture on Performance during COVID–19 Pandemic: An Insight From the Malaysian Healthcare Industry

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ABSTRACT

This research-based chapter investigates the impact of organizational culture on organizational performance in the context of Malaysian healthcare industry during the COVID 19 pandemic. The study developed a framework based on Daniel Denison's organizational culture model with organizational culture as second order contrast comprised of factors namely adaptability, involvement, consistency, and mission. The data was collected from 202 healthcare professionals working in hospitals in Malaysia. Data collection was conducted using self-administered online questionnaire measuring items on Likert scale of 1-7. The data were purified and assessed for its reliability and normality using SPSS 22. This then was followed by confirmatory factor analysis, validity assessment and structural equation modelling using AMOS 24 software. The results of the research exhibited that the proposed model has appropriate fit and organizational culture has a direct strong positive impact on organizational performance.

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INTRODUCTION

The healthcare system in Malaysia is divided into two segments which is a government-led and funded public sector, and a thriving private sector that has evolved exponentially over the last quarter of a century (MHTC, 2020). According to MHTC (2020), although the public sector serves 65% of the population, only 45% of all registered doctors and fewer specialists cater to the population. However, doctors practicing in Malaysia must complete three years of service in public healthcare to warranty sufficient cover for the population. Malaysian citizens pay for public healthcare through the general taxation of income; therefore, patients pay a nominal fee in this heavily subsidized public healthcare sector, which is only applicable for Malaysian nationals (MHTC, 2020). Foreigners may seek public healthcare with additional fees payable or opt for private healthcare available. Although public healthcare is a cheaper option, private healthcare has its advantages, such as providing faster services as there are more doctors in the sector due to better working conditions and higher remuneration packages (MHTC, 2020). However, public hospitals do not have the same excellence in the services and care of patients as private healthcare (Sbmedix, 2017), there is a lack of urgency among healthcare employees in performing duties, and government healthcare administration seems to be causing bottlenecks everywhere.

According to a survey taken by Cheema (2017), 25% of the population stopped seeking medical treatment at government hospitals due to excessive waits. In government hospitals, patients often have to wait for weeks to see a specialist, and surgery postponements are very common as beds are scarce to obtain because most hospitals are full (Cheema, 2017). Healthcare providers in public hospitals have little accountability, and most of the services are provided by doctors in training or junior doctors. Although Malaysians prefer private healthcare, it is costly to pay out of pocket for it as medical services and surgeries are high due to its profit-based nature of the organization (Cheema, 2017). Henceforth, private healthcare is accessible to only the affluent or people with private health insurance. According to MOH (2020), the Malaysian government's commitment to providing high-quality healthcare accessible to everyone has been unparalleled, to what it was in the past, through providing clinics and hospitals nationwide; there are still shortages of quality healthcare facilities in the remote parts of the country.

The recent pandemic COVID-19 outbreak caused a significant organizational failure in the Malaysian healthcare industry. It is reported by Durgahyeni (2020) that the private healthcare sector was hit hard with steep revenue drops of at least 50 percent during the COVID-19 crisis in Malaysia. Since Movement Control Order (MCO) was implemented on March 18, 2020, the patient load has dropped by 70 to 80 percent at private healthcare facilities and over 50 percent at General Practitioners (GP) clinics (Durgahyeni, 2020). Furthermore, it is predicted that medical tourism will be the most affected due to lockdowns worldwide as patients continue to avoid healthcare facilities even after partial lockdown, Recovery Movement Control Order (RMCO) is lifted. According to Thomas (2020), RMCO was extended until 31 December 2020 resulting in continuance decline of medical tourism as international patient have been hindered from visiting private healthcare facilities in Malaysia. Patients who pay for treatment themselves have drastically dropped because people have not been going to work and have no income (Durgahyeni, 2020). Moreover, many patients wrongly assume they could be infected with COVID-19 at private healthcare facilities. Another problem that arose from this pandemic issue caused the retirement of senior, highly knowledgeable medical professionals.

In the Malaysian public healthcare system, the main concern is the wide variation of competency between the junior doctors operating the health clinics and the out-patient departments of the district hospitals. According to Devaraj (2019), senior specialists in the government sector revealed that 30%

of the junior doctors in service are incompetent, leading to delays in diagnosis and misdiagnosis. This problem has contributed to patients going straight to the general hospitals for assessment and treatment. World Bank (2020) recorded rising Gross Domestic Product (GDP) which was in tandem with the federal allocation for the Ministry of Health (MOH) from RM14.8 billion in 2010 to RM30.6 billion in 2020, representing a 51.6% increase in allocation (Syed Jaafar, 2019). The inflation of costs for the advancements in the modalities of investigation and treatment have increased faster due to rising GDP (Devaraj, 2019). This resulted in insufficient funds for MOH to expand its services to deliver newer treatment modalities comprehensively despite an allocation of 10% of the federal budget (Durgahyeni, 2019). The increasing cost of healthcare modalities does not merely affect public healthcare practices alone; it highly affects private healthcare in terms of its organizational financial performances, leading to patients having to allocate more money for quality healthcare purposes. The lack of empathy and personalized care towards patients are two main cultural issues that the Malaysian healthcare system is facing causing to a drop in Malaysian healthcare performance (Rashid, Mansor, & Hamzah, 2011). Studies have shown that 37% declared that lack of culture is a workplace challenge (Osman, 2017). Furthermore, “culture” was mentioned 21 times in the recent report into over 450 premature deaths at UK based Gosport War Memorial Hospital (Mannion & Davies, 2018).

Top management executives are shaping their organizations to have a competitive advantage in current challenging business settings as a top priority. According to Nikpour (2017), organizational culture has a substantial positive impact on organizational performance, measured via dimensions of efficiency, productivity, quality, and innovation. Organizational culture with strategic involvement produces excellent results in healthcare performance (Carney, 2006). According to Acar and Acar (2012), innovative activities can produce a positive impact in organizational performance. The productivity of the organizational performance is negatively affected when work environment stress is involved (Delarue et al., 2008). Adoption of work culture is a positive practice that improved the performance of the healthcare organization for Penang Adventist Hospital which is one of the popular hospitals in the state of Penang in Malaysia. According to Osman (2017), healthcare management has been facing challenges enhancing the performance of healthcare services and improving the quality of healthcare. The quality of healthcare and its organizational performance are influenced by management style, staff competency level, organizational cultures, place of work and team dynamics (Mohd. Osman, 2017). Healthcare services are suffering epidemics of cultural shortcomings worldwide. Healthcare organizational culture critically affects all other features of the service which patients receive. According to Mannion and Davies (2018), there are three layers of organizational culture in healthcare: visible manifestations, shared ways of thinking, and deeper shared assumptions.

Therefore, it becomes paramount to investigate the impact of organizational culture on organizational performance in the specific context of COVID 19 pandemic. This study aims to uncover such impact by formulating a second-order construct of organizational culture based on Daniel Denison’s organizational culture model. The corresponding research question is thus formulated as ‘what is the impact of organizational culture on organizational performance of Malaysian healthcare industry during COVID 19 pandemic?’

Next, the chapter presents review of related literature followed by identification of research gap and presenting conceptual framework to bridge the gap. Research methodology is the discussed before analyzing the data to report results and discussion. Conclusion is then stated along with limitations and future research avenues.

LITERATURE REVIEW

Theoretical Background

An organization has administrations with different cultures, traditions, and systems like how a country is governed. These different organizational cultures form its basic personality which is the principle of how the employees interact and operate. The independent form of behaviour that determines how things are done is known as culture (Thomas, Katzenbach & Oelschlegel, 2019). Furthermore, organizational culture is accumulated when specific difficulties and troubles occur and are resolved within an organization. According to Thomas, Katzenbach and Oelschlegel (2019), organizational culture depicts the collective principles, beliefs and values of its employees. There is different product of factors within an organization including product, industry, history, technology and strategy, national culture, management style and employee type (Needle, 2004). According to Handy (1993), the cultural trait in an organization is divided into four sub cultural trait including, power, task, person, and role.

The intended goal and objectives used as measurement benchmarks with the actual results of an organization is known as organizational performance. Most management tasks are developed based on the goals and objectives of an organization with the intent that the organizations' achievement can be reflected in its performance (Forehand, 2000). Performing, applying, and executing each task with commitment and consistency is defined as performance. According to Chamanifard, Nikpour, and Chamanifard (2014), the process is related to input and outputs and indicates that performance is correlated with work and its results. The accumulation of accomplishments achieved by all subdivisions is known as organizational performance, and these accomplishments are typically tied-in with an organizational goal within a time frame (Forehand, 2000). Both short-term and long-term goals are influenced by organizational performance which is directly proportional to the prosperity and persistency of an organization (Lee & Huang, 2012). Organizational performance can be measured with innovation, quality, productivity, efficiency, and effectiveness of an organization (Forehand, 2000).

According to Mannion and Davies (2018), paying greater attention to the multi-faceted and multi-layered complexity of the term, the nature of complex organization can be understood. Quality improvement on either the performance to be improved or the aspect of service quality in the healthcare settings by understanding these insights depends on the usage of the precise nature of the quality improvement methods. These latter aspects in organizational culture within the healthcare industry often interrelate and at times, may overwhelm cultural feature which causes inability to shape and improve services and culture thus, the focal point of an organization's effort to improve on healthcare culture has political ramifications which should be dealt with rather than disregarded (Mannion & Davies, 2018).

Review of Empirical Studies

Bradley et al. (2017) assessed hospital organizational culture to enhance the quality of cardiovascular care and identified five key variables of organizational culture namely learning environment, commitment to organization, time for improvement efforts, psychological safety, and senior leadership support. The study conducted by Ghorbanhosseini (2013) which uses teamwork, organizational culture and organizational development as independent variables, human capital as the mediating variable, and organizational performance as a dependent variable, indicated that the beliefs and cultural values could improve organizational commitment. It is also shown that the important factor in cultivating attitudes

and values, forming appropriate behavioural patterns and employee's organizational commitment is organizational culture. Another important factor which had a significant impact on organizational commitment and human capital is teamwork. Organizational development by enhancing working processes and structures can lead to improvement of organizational commitment (Ghorbanhosseini, 2013). The research by Ghorbanhosseini (2013) illustrates that organizational commitment, teamwork and organizational culture have an immediate and significant impact on organizational commitment which boosts organizational performance therefore, it is crucial to improve organizational culture of the employees by improving norms, values and beliefs of the organization and also enhancing teamwork.

Organizational culture is pertinent in performance improvement regardless of the industry, size, type or age of an organization and its effects on organizational performance includes innovation, financial performance, employee, and customer satisfaction (Idowu, 2016). According to Idowu (2016) the most successful organizations share competitive, achievement-oriented culture which implied that the right type of organizational culture is correlated with higher levels of organizational performance. The association of organizational culture, employee's organizational commitment and organizational performance are analysed in the research by Nikpour (2017) which indicated that organizational culture has a direct positive impact on organizational performance and the employee's organizational commitment has a more significant indirect positive impact on organizational performance. Tang (2017) indicated that knowledge management has an evident influence on organizational effectiveness and organizational culture, which meant that better knowledge management yielded higher organizational effectiveness and that better organizational effectiveness yielded higher organizational culture. Conclusively, enhancing the overall organizational effectiveness of the healthcare industry is essential for patients to receive higher service qualities. Providing optimal knowledge management environment on Tang (2017) is the most critical goal for healthcare organization as this helps strengthen the training and education for employees and integrate channels for knowledge exchanges within the healthcare industry so that a virtuous cycle of healthcare knowledge is formed, and the patient will receive the highest quality of healthcare.

According to Rider et al. (2018), organizational culture can be shaped by adopting motivators that enhances humanism. Strategies to counteract the adverse effects of changes within an organizational environment have mainly been concentrated on cultivating humanistic attributes in individuals and it is suggested that cultural change at an organizational level is equally significant (Rider et al., 2018). The study recommended organizational change that keeps compassionate patient care and humanistic as its key focus. Measures that focus only on individuals are not likely to accomplish employee satisfaction, compassion, resilience, well-being, and optimal patient care without positive organizational transformations (Rider et al., 2018). According to Lee, Gowen, and McFadden (2018) which generated crucial implications for healthcare administrators, lowering readmission rates is a primary concern for hospitals. Firstly, it is suggested that developing a hierarchical culture is the more effective cultural strategy to aim at reducing readmission rate in comparison to other culture types despite there is no one best competing value framework (CVF) culture type for enhancing performance of every healthcare organization. Implementing lean management practices is a practical way to strengthen a hierarchical culture as its primary focus includes improved bottom-line results, relentless pursuit of efficiency and increased delivery speed of services and products (Delisle & Freiberg 2014). This is proven in a recent case study by Jayasinha (2016) that lean management practice has improved patient satisfaction, and reduced patient cycle time and waiting time. As indicated on public websites such as Center for Medicare and Medicaid Services and Facebook, efforts to reduce readmission rates are highly appreciated by customers (Lee et al., 2018). Lower readmission rates are also directly related to higher patient satisfaction, which is correlated with

higher public perceptions of the healthcare facility. Moreover, Facebook could provide reliable and valid information related to operational quality and customers' satisfaction of the healthcare facility with the significant correlation between objective patient satisfaction measures and healthcare facility ratings on Facebook in the research by Lee et al. (2018). Henceforth, it is important for healthcare administrators to take a holistic approach to reduce readmission rates, improve its operations and service quality, and subsequently improve Facebook ratings by taking advantage of opportunities for utilizing and analyzing SNS information. A qualitative content analysis of Facebook comments can be conducted to gather ideas for quality improvement, as it might offer enriched insights for improvement on medical errors, physical plant, departments and staff (Lee et al., 2018).

Organizational culture is a set of norms of behavior and dominant values held within an organization, an active expression of the operations of the organization both externally and internally (Forgon, 2018). It is discussed in the same research on the type of characteristics of organizational culture that was deemed the most important in healthcare organizations and on the way to diagnose organizational culture in them. According to Forgon (2018), organizational culture is classified as an internal variable as this perspective enables the research to explain the efficiency of the entire healthcare organization. Consistency was identified as the most important culture perspective for healthcare organizations as it is the determinant for the performance and quality of health services (Forgon, 2018).

Baird et al. (2019) studied the relationship between employee organizational commitment (EOC) and hospital performance with the provision of adequate healthcare facilities as a pre-requisite of EOC. Adequate healthcare facilities include medical, staff and support as a supporting role would have a positive impact on the hospital performance with highlighting the important role of EOC (Baird et al., 2019). Different levels of EOC were discovered to be positively correlated with both the level of operational effectiveness and patient care. Further findings supported the importance of EOC in increasing organizational performance and implied that healthcare administrators should implement the necessary working environments, incentives, and processes to improve the level of EOC of their employees. Healthcare administrators should emphasize on making sure that the job characteristics, level of organizational support, and work environment provided are conducive to enabling the improvement of EOC. An initial insight into this relationship was provided by Baird et al. (2019), highlighting the importance of supplying sufficient facilities in improving the level of EOC within hospitals mainly when a positive indirect influence on both operational effectiveness and patient care resulted thereafter as a provision of adequate support facilities and staff resources. This finding featured EOC as a mediator of the relationship between the provision of sufficient resources and the performance of healthcare organization. Although the role of human capital is less understood, visible, and measurable than financial capital, it is still the main contributor to organizational success (Baird et al., 2019).

As a result of this critical review, the gap is identified related to investigating such organizational culture elements on organizational performance in the context of COVID 19 pandemic. Against the background of the research discussed, corresponding research questions and identified research gap, the current study focuses on investigating such impact at the time of COVID 19 pandemic.

Daniel Denison's Model

The focus of the organizational culture model in this research is based on four cultural traits that have been shown in various studies, which will be discussed in the review of empirical studies section, to have an influence on organizational performance: involvement, consistency, adaptability, and mission

(Denison et al., 2006; Kotter & Heskett, 1992). Each of the culture traits is calculated with three component indexes, and each of those indexes is reasoned with five survey items. The four cultural traits are discussed in this section to provide an overview of the model as follows:

Involvement

According to Buckingham and Coffman (1999), effective organizations engage and empower its people, build organization around teams, and grow individual capability at every level. Members of the organization are committed to their work and have a strong sense of pride and ownership. These individuals feel the need to have an input into the decision-making process of the organization as it affects work and the work is directly associated with the goals of the organization. Consequently, high involvement organizations are able to rely on voluntary, informal and implicit control systems, rather than explicit, formal, bureaucratic control systems. In this model, this cultural trait is measured with empowerment, team orientation and capability development. Empowerment: Individuals with own initiative, authority, and an aptitude to manage their own work are able to create a sense of ownership and accountability toward the company. Team orientation: All employees feel mutually accountable when value is placed on working cooperatively toward a common goal. Team effort is depended heavily by the organization to get work accomplished.

Consistency

The development of employee's skills is constantly invested by the organization to facilitate the competitiveness of the market and meeting on-going business needs. Organizations are effective with consistency and good integration (Saffold, 1988). This is implied that the organization has individuals that are skilled at reaching agreement while incorporating different point of views, and the organization's activities are well integrated and coordinated (Lencioni, 2002). Consistent organizations develop an approach and create organizational structures that shape an internal system of governance based on consensual support. These structures are able to create effective ways of achieving coordination and integration in comparison to external-control system that are based on rules and regulations. The employees of these organizations tend to be highly committed individuals as the organization employ a distinct method of doing business, a tendency to promote from within, and a clear set of "do's" and don'ts". This type of consistency is a powerful basis of stability and internal integration, and it is measure with core values, agreement, and coordination and integration. Core Values: Employees of the organization share a set of values which create a sense of identity and a clear set of expectations.

Adaptability

Although there are natural advantages of well-integrated organizations, implementing changes can be difficult as they can be the least adaptive with internal and external adaptation at odds with one another (Lawrence & Lorsch, 1967). Organizations that can adapt easily, transform the demands of organizational environment into action where risks are taken, and mistakes are learnt, and there is a capability creating changes (Kotter, 1996). The ability to provide value for its customers by creating a system of norm and beliefs that support organization's capacity to accept and interpret signals from its environment into

internal systems that improves the organization's chances for growth and survival are continuously improved. This culture trait is measured with customer focus, creating change and organizational learning.

Mission

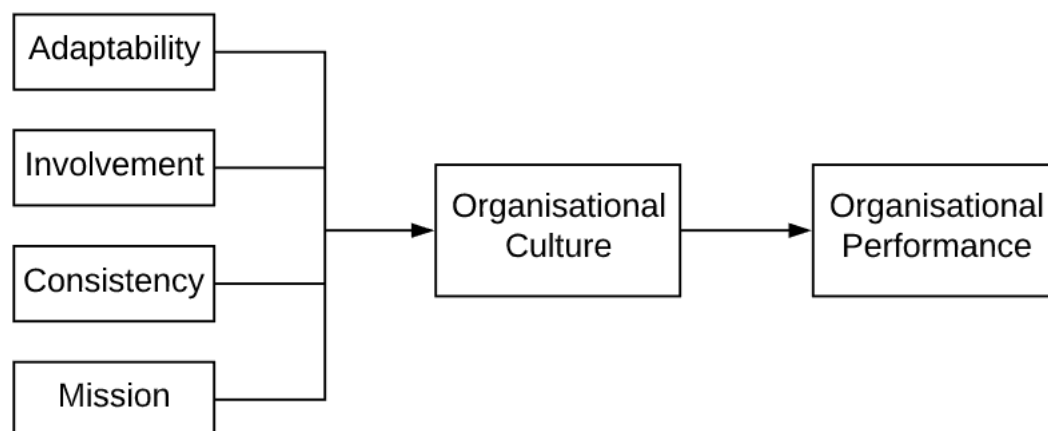
A clear sense of purpose and direction defined within organizational goals and strategic objectives with a definitive vision of the organization's future is a successful organization (Prahalad and Hamel, 1994). A mission gives purpose and meaning via defining a social role and external goals for the organization as it provides a clear direction and objectives that helps define the appropriate course of action for all members of the organization. Furthermore, by allowing an organization to shape current behavior, a desired future state of the organization can be envisioned. Mission is a cultural trait measured with vision, goals and objectives, and strategic direction and intent.

Based on the literature review, organizational culture dimensions to focus on this research will be the adaptability of an organization, the involvement of members of the organization, the consistency within an organization, and the mission of an organization by following Denison's model of organizational culture. Primarily, the gap exists when it comes to investigation of the impact of various organizational culture dimensions on the performance in the context of healthcare organizations in Malaysia. In addition, studies are sparse when it comes to understanding such influence during COVID 19 era. Particularly, when healthcare organizations were tested during these trying times, investigating how culture impacted performance is under researched.

Conceptual Framework and Hypothesis

Conceptual framework is thus formulated to bridge the stated research gap. Figure 1 displays the same:

Figure 1. Conceptual framework



The empirical study by Solaja, Idowu, and James (2016) shows that an organization with the right set of culture traits regardless of its demographics contributes to high organizational performance

levels. Daniel Denison's model of organizational culture was discussed in the study by Forgon (2018) as it is classified as an internal variable and used to test the increase in efficiency and performance of the organization. Additionally, Nikpour (2017) measured that organizational culture using independent variables of adaptability, involvement, consistency, and mission significantly impacted organizational performance. The organizational performance in the mentioned study was measured using dimensions of productivity, efficiency, innovativeness and quality. The positive impact was reported of these dimensions on organizational performance.

Ergo, the following hypothesis is formulated to bridge the research gap according to the aforementioned research question:

H: Organizational culture has a positive and significant impact on organizational performance in the Malaysian healthcare industry in the context of COVID 19 pandemic.

METHODOLOGY

The study employs a causal approach with a quantitative research method, and empirical data is collected using self-administered online questionnaire circulated through a google form. Snowball sampling is applied in this research as the healthcare employees in private organizations might extend the invitation to participate in the survey with public healthcare employees within their network. This sampling method increases the accuracy and precision to the rightful target population due to the healthcare industry being a close-knitted and small industry in comparison to others (Kothari, 2004). The participants were encouraged to forward the questionnaires to their friends and colleagues working in the healthcare industry.

he four variables that the survey questions were based on are employee's adaptability to changes within an organization, employee's involvement within the company, consistency of employee in performance and having a shared mission within the organization. In this research, the Likert-scale questionnaire tool is utilized through a 7-point scale ranging from "strongly disagree" to "strongly agree" with "neither disagree nor agree" in the middle (Wilson, 2014). Although Daniel Denison's Model is adopted, all items used in the model were not taken as it is. The reason for this being several other studies adopted the model and items and contextualized for various sectors. Current study reviewed such adoption by various other researchers and adopted the items appropriate in the context of current study. Table 1 displays survey questionnaire items and corresponding sources.

Impact of Organizational Culture on Performance during COVID-19 Pandemic

Table 1. Survey questionnaire items

Variables	Adapted Items	Sources
Adaptability	Different parts of my organization often cooperate to create change.	De Noni, Ganzaroli, Orsi and Roberta (2013)
	Customer input directly influences my organization's decisions.	Flint, Blocker and Boutir (2011)
	We make certain that 'right hand knows what left hand is doing'.	
	Change is viewed as an opportunity in my organization.	Burke and Noumair (2015)
Involvement	Decisions are always made at the level where the best information is available.	
	Each person can see the relationship between his/her job and the goals of organization.	Barrick, Mount and Li (2013)
	There is continuous investment in skills of employees.	Galikhanov et al. (2015)
	There is an openness to suggestions from staff at all levels.	Christian, Janssen, Yang and Backes-Gellner (2013)
Consistency	The leaders and managers' practice what they preach'.	Papke-Shields, Beise and Quan (2010)
	There is clear agreement about right way and wrong way to do things.	
	There is good alignment of goals across levels.	Williams, Pieper, Kellermanns and Astrachan (2018)
	There is little variation in working procedure among employees.	
Mission	Our strategy leads other organizations to change the way they compete.	Shahzad, Bajwa and Zia (2013)
	People understands what needs to be done for us to succeed in long run.	James and Lahti (2011)
	Our vision creates motivation for our employees.	Grant (2012)
	We are inspired by company's mission.	James and Lahti (2011)
Organizational Performance	There are no cases of staff leaving for internal reasons.	Ponnu and Chuah (2010)
	Productivity of our employees are higher than industry standards.	Saeed Mohamed et al. (2018)
	Employees feel committed to organizations.	Ponnu and Chuah (2010)
	Absenteeism in our company is very low.	Belita, Mbindyo and English (2013)
	We deal with customer complaints faster than competitor.	Stevens, Spaid, Breazeale and Esmark Jones (2018)
	Reputation of the company has improved compared to last year.	Ginesti, Caldarelli and Zampella (2018)

Data was collected from total of 202 healthcare professionals (comprised of physicians, nurses etc.) and considered as sufficient for the analysis using AMOS 24 software (Hair et al., 2006). The data

analysis plan illustrated in Table 2 is applied in this research and will be demonstrated in the next section with detailed analysis.

Table 2. Data analysis plan

Analysis	Rules of Thumb	Reasons	Sources														
Demographic Analysis	Not Applicable	Quantitative information analyzed separately in age, race, gender, position, income bracket and marital status.	Glass & Hopkins (1984)														
Normality Test	Skewness kurtosis should be within -1 to +1	D’Agostino K2 test.	D’Agostino (1970)														
Reliability Test	- Cronbach > 0.7 - CR > 0.6 - AVE > 0.5	- Cronbach’s Alpha - Construct reliability (CR) & Average Variance Extracted (AVE)	Sekaran and Bougie (2013) Harun, Zaki, Ismail & Awang (2016)														
Validity Test	- AVE > 0.5 - Fit Indexes for constructs:<table><tr><th>Category</th><th>Index</th></tr><tr><td rowspan="4">Absolute Fit</td><td>(X²) P>0.05</td></tr><tr><td>RMSEA<0.08</td></tr><tr><td>GFI>0.90</td></tr><tr><td>AGFI>0.90</td></tr><tr><td rowspan="4">Incremental Fit</td><td>AGFI>0.90</td></tr><tr><td>CFI>0.90</td></tr><tr><td>TLI>0.90</td></tr><tr><td>NFI>0.90</td></tr><tr><td>Parsimonious Fit</td><td>Chi-Square/df<3.0</td></tr></table> - Correlation between constructs <0.85	Category	Index	Absolute Fit	(X ²) P>0.05	RMSEA<0.08	GFI>0.90	AGFI>0.90	Incremental Fit	AGFI>0.90	CFI>0.90	TLI>0.90	NFI>0.90	Parsimonious Fit	Chi-Square/df<3.0	- Convergent validity rules to measure a set of items in one construct are inter-correlation. - Construct validity on all construct of the measurement model (min 3 fits indexes chosen). - Discriminant Validity is to measure the correlation between the constructs, ensure no redundancy.	Kline (2011) Holmes, Coote & Cunningham (2006) and Hair, Back, Hair, Babin & Anderson (2010) Zainudin (2012) Kline (2011)
Category	Index																
Absolute Fit	(X ²) P>0.05																
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	CFI>0.90																
	TLI>0.90																
	NFI>0.90																
Parsimonious Fit	Chi-Square/df<3.0																
CFA / SEM	- CFA - SEM	- CFA model fit - Structural model fit for hypothesis testing	Kyriazos (2018)														

RESULT AND DISCUSSION

Descriptive Statistics

Demographic profiles of the respondents were divided into gender, age bracket, race, income bracket and education background. The gender and race distribution of the demographics were quite evenly distributed. Age brackets of the respondents were between 25 to 30 years of age with minimum monthly income brackets below RM3,500 equates to less than half of the respondents and majority of the respondents in the 31 to 50 years age bracket has monthly income brackets below RM10,000. Finally, more than half of the respondents possess a minimum bachelor's degree.

Normality Assessment

The D'Agostino's K2 test was employed as the sample size is more than 50 whereby the kurtosis and skewness were analyzed in its calculation from the respective respondents (D'Agostino, 1970). According to Hair et al. (2006), the values of kurtosis and skewness should be between -1 to +1 in an ideal environment. In the range of -2 to +2 for kurtosis and skewness, it is still considered as normal univariate distribution and is acceptable (George and Mallery, 2010). The skewness column representing all the statistical values falls in the range of -1 to +1 which are the ideal values of skewness. Moreover, the kurtosis statistic in this study also revealed an ideal overall normal distribution with values in between -1 and +1. It can be concluded that both scores of skewness and kurtosis in this study is well within the excellent rule of thumb. Table 3 displays result of normality assessment.

Table 3. Descriptive statistics

	Mean	SD	Variance	Skewness	Kurtosis
AD1	5.23	1.386	1.921	-.810	.721
AD2	5.16	1.288	1.660	-.563	.099
AD3	4.94	1.374	1.887	-.532	0.74
AD4	5.37	1.437	2.065	-.998	.746
IV1	5.34	1.413	1.997	-.934	.663
IV2	5.08	1.376	1.894	-.595	.140
IV3	5.17	1.571	2.469	-.717	-.101
IV4	5.04	1.516	2.297	-.587	-.300
CN1	4.64	1.477	2.181	-.574	.031
CN2	4.91	1.339	1.793	-.426	-.181
CN3	5.01	1.275	1.627	-.537	-.179
CN4	4.61	1.414	1.999	-.517	-.134
MI1	4.84	1.406	1.978	-.681	.346
MI2	4.97	1.365	1.864	-.742	.364
MI3	5.08	1.477	2.183	-.864	.569
MI4	5.05	1.446	2.092	-.674	.186
OP1	3.74	1.754	3.078	-.098	-.856
OP2	4.75	1.499	2.247	-.617	-.028
OP3	4.90	1.375	1.891	-.713	.444
OP4	4.94	1.475	2.176	-.723	.133
OP5	5.08	1.349	1.819	-.585	.084
OP6	5.28	1.247	1.555	-.742	.790
Valid N				SD=.171	SD=.341

Reliability Assessment

Assessment of the stability and consistency of the results produced from the set of data was administered using reliability test (Phelan & Wren, 2006). Cronbach α test is applied. it shows all the five variables had a majority of good scores between 0.847 to 0.900 with the exception of one variable which is Adaptability receiving an acceptable scoring of 0.767. Nevertheless, it is still considered very reliable and confirmed its validity for this research, which fulfills the rule of thumb for good and excellent rating with high reliable alpha value of above 0.700 (Glen, 2014). In conclusion, the reliability test results demonstrated that it is highly reliable and highly consistent; therefore, the analysis is very trustworthy and rightful for usage with an overall excellent scoring of 0.955, which is up to par with the rule of thumb, alpha value above 0.900 (Davis, 1989). Table 4 displays result of reliability assessment.

Table 4. Reliability analysis

Variables	Number of Items	Cronbach's Alpha	Assessment
Overall	22	0.955	Excellent
Adaptability (AD)	4	0.767	Acceptable
Involvement (IV)	4	0.856	Good
Consistency (CN)	4	0.856	Good
Mission (MI)	4	0.847	Good
Organizational Performance (OP)	6	0.900	Excellent

Confirmatory Factor Analysis

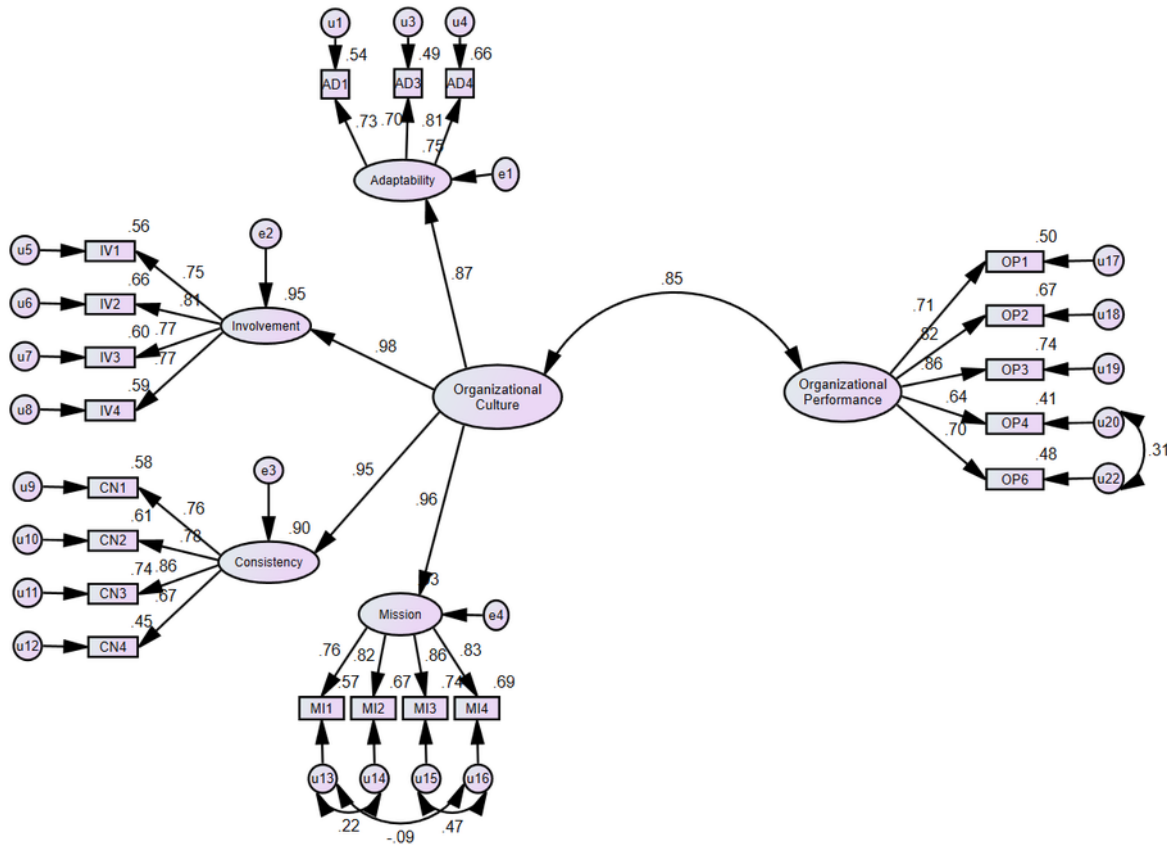
The confirmation of the multiple-item construct measure's accuracy must be conducted with Confirmatory Factor Analysis (CFA) prior to testing the hypothesis (Harrington, 2009). The result of CFA path diagram is shown in Figure 2. Table 5 is an assembled list of the most common fit statistics used and recommended cut-offs that demonstrate a good fit. Initially, Model fit was not achieved in initial measurement model. Although reliability analysis using Cronbach's Alpha coefficient has proven it to be acceptable, but model fit is not, the possible reasons could be due to inconsistent dimensions, redundant measures, and possibly correlated dimensions (Schmitt, 1996).

Table 5. CFA model fit: common fit statistics used and recommended cut-offs

Measure	Name	Description (References)	Cut-off value for good fit
χ^2	Model Chi-Square	Assess overall fit and the discrepancy between the sample and fitted covariance matrices (Wheaton et al., 1977).	p-value > 0.05
RMSEA	Root Mean Square Error of Approximation	A parsimony-adjusted index. Values closer to 0 signify a good fit (Rigdon, 1996).	RMSEA $\leq$ 0.08
(A)GFI	(Adjusted) Goodness of Fit	GFI is the proportion of variance accounted for by the estimated population covariance (Tanaka and Huba, 1985).	GFI $\geq$ 0.95 AGFI $\geq$ 0.90
CFI	Comparative Fit Index	A revised form of NFI. Not very sensitive to sample size. Compares the fit of a target model to the fit of an independent, or null, model (Bentler, 1990).	CFI $\geq$ 0.90
TLI	Tucker Lewis Index	A TLI of 0.95, specifies the model of interest improves the fit by 95% comparative to the null model. TLI is preferable for smaller samples (Bentler and Bonett, 1980).	TLI $\geq$ 0.95
IFI	Incremental Fit Index	IFI values close to 1 indicate a very good fit (Bollen, 1989).	IFI $\geq$ 0.90
χ^2/df	Relative/normed chi-square	Marsh and Hocevar (1985)	$\chi^2/df < 5.0$

The statistical method of Second-Order CFA is employed to confirm that the theorized construct in a study impacts a certain number of underlying sub-constructs (Zainudin, 2012). In this research, the theory is tested that Organizational Culture consists of four underlying sub-constructs: adaptability, involvement, consistency, and mission and each sub-construct is measured by means of a certain number of items with the questionnaire. The estimation of the Organizational Culture's influence on its sub-constructs can be performed. As illustrated in Figure 2, Organizational Culture is the primary construct while adaptability, involvement, consistency and mission are the four sub-constructs. In second-order CFA, the central construct OC will be second-order construct and the three sub-constructs will be the first-order constructs. The second-order construct CFA is used to validate the measurement models of the latent constructs for validity, reliability, and one-dimensionality (Zainudin, 2012). The factor loading of Second-Order CFA results is presented in Figure 2. Firstly, it is observed that the all-fit indexes have achieved the required level for the second order, which results in no item modification or deletion. Results showed that organizational culture construct loads well on its four sub-constructs. The factor loading of organizational culture on adaptability, involvement, consistency and mission are 0.87, 0.98, 0.95 and 0.96 respectively which is well over its rule of thumb score of 0.70 and summed up that the four sub-constructs extract sufficient variance from organizational culture (Zainudin, 2012). The theory that Organizational Culture consists of four sub-constructs is well supported.

Figure 2. Measurement model

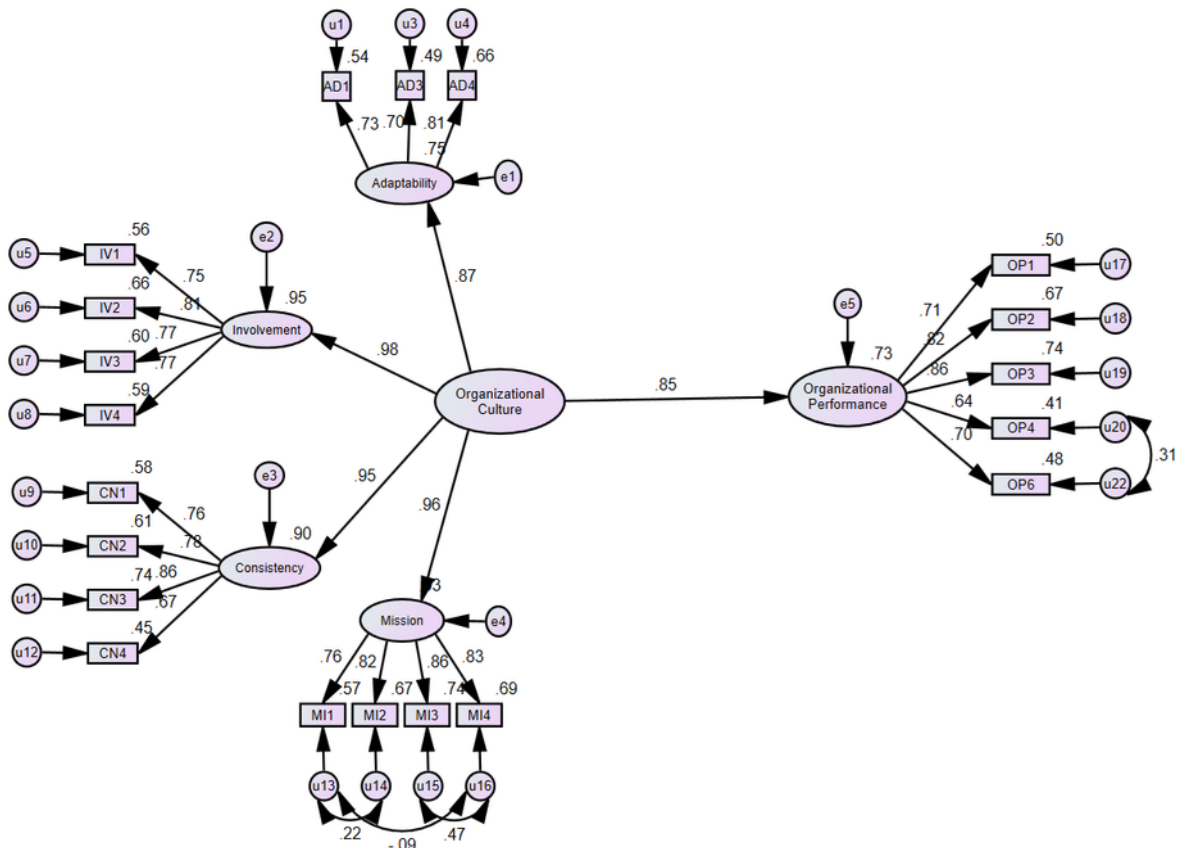


All of the fit indexes were within the acceptance phase of all the values except for (A)GFI result of 0.842, which is close to 0.90 and still considered acceptable for this research. The chi-square showed a significant value of 0.00 value for the general model of suitable assessment in the current study (Kline, 2011). The mode of this research was good as indicated with the RMSEA score of 0.059 which was less than 0.08 as per the level of acceptance (Holmes, Coote & Cunningham, 2006). The rule of thumb for CFI value > 0.90 was justified in the results with a value of 0.959 as a healthy fit and deemed acceptable for this study (Zainudin, 2012). The TLI value fits the indicated acceptable score of ≥ 0.95 with the measured value of 0.952 indicates that the model of interest improves the fit by 95.2% (Kline, 2011). The Chi-Square/Df outcome of 1.704 that was obtained in the analysis is < 3.0 , which falls in the appropriate range (Kline, 2011). This research concluded to validate the hypothesis pertaining to the CFA's dimension of the model of fit to analyze the impact of the outcome when the organizational culture factors were applied to observe organizational performance in the Malaysian healthcare industry.

Structural Equation Modelling

The assessment of the constructs displays the direct effects amongst the sub-constructs as shown in the parameter estimates of the structural model. Significant correlations among the sub-constructs are shown based on the key factors from the output revealed in Figure 3. The value of Chi-Square/Df = 1.704 is a significant value which was according to the rule of thumb value of less than 3.00. This presented that the model was a good fit (Zainudin, 2012). The IFI value for this study was at 0.960 and the Comparative Fit Index (CFI) value was 0.959 and according to Hair et al. (2014), these outcomes conclude that it is a good fit model with values above 0.90. Furthermore, the TLI value was also above the rule of thumb which is above 0.90 with a value of 0.952. The RMSEA value of above 0.08 was recorded, which was an acceptable range (Hair et al., 2010). As all the achieved values are within the rule of thumb, the model is concluded to be a very good fit for the data collected in the Malaysian healthcare setting.

Figure 3. Structural model



Discussion on Findings

Table 6 illustrated that this hypothesis is valid and supported as the organizational culture has a direct significant impact on organizational performance in the Malaysian healthcare industry ($\beta = 0.852$, $p < 0.001$). This denotes that there will be an increase of 85.2% in organizational performance when the organizational culture is increased by 1.0%. According to Idowu (2016), contribution of high levels of organizational performance can be obtained with the right set of cultural traits practiced within an organization. It is proven in the study by Forgon (2018) that organizational culture which is classified as an internal variable, increases efficiency and organizational performance. Furthermore, Nikpour (2017) concluded that the organizational performance which was measured using dimensions of productivity, efficiency, innovativeness and quality demonstrated a significant increment when it was measured with organizational culture traits of adaptability, consistency, involvement and mission. In summation, organizational culture has significant and positive impact on organizational performance in the Malaysian healthcare industry. Therefore, H1 is supported.

Table 6. Hypothesis testing results

Dependent Variable		Independent Variables	β Estimate	P	Results
Adaptability	←	Organizational Culture	0.868		
Involvement	←	Organizational Culture	0.976	***	Significant
Consistency	←	Organizational Culture	0.947	***	Significant
Mission	←	Organizational Culture	0.963	***	Significant
Organizational Performance	←	Organizational Culture	0.852	***	Significant

The finding of the research showed that organizational culture has a positive and significant impact on organizational performance in the Malaysian healthcare industry. The results are in line with the findings of Acar & Acar (2012), Shahzad et al. (2012), and Nikpour (2017). Acar & Acar (2012) supported the positive effects of organizational culture on the business performance in an organization. Shahzad et al. (2012) emphasized that organizational performance has been deeply impacted by organizational culture. The different perspective of organizational culture is influenced by all dimension of organizational culture. Nikpour (2017) asserted that organizational culture exerted direct and indirect impact on organizational performance.

CONCLUSION

This study concludes that organizational culture has a strong positive impact on organizational performance when investigated in the context of Malaysian healthcare industry during COVID 19 pandemic

period. The construct of organizational culture investigated in this context comprised of four factors namely adaptability, involvement, mission and consistency. Therefore, in order to enhance organizational performance, developing stronger organizational culture is of utmost importance. This shows that irrespective of COVID-19 context, the influence of culture on the performance remains significant and positive. However, the findings can vary in terms of its magnitude. Future research is suggested to uncover these aspects to check the influence in recovery and post covid era.

This can be done by several aspects related to selected factors of the organizational culture construct. Healthcare organizations should develop a mission statement to produce more personalized case within the healthcare industry. Mission within an organization in the healthcare industry helps to clearly state the purpose of an organization, and it is the management's responsibility to communicate these statements in an effective manner as well as to provide a means to measure and inspire future progress for the purpose of increasing organizational performance. A stronger mission statement should be implemented to unite the entire organization to work towards its goal as one strong entity, whether the organizational performance is measured in terms of financial perspective, patient perspective or internal perspective. In doing so, this will increase the organizational performance of the healthcare business.

Cultural trait of adaptability in healthcare organizations will be most suitable to be implemented during this outbreak of COVID-19 which have caused lockdowns all over the country. Private healthcare facilities can adapt to this pandemic issue by practicing pre-registration triage, hand-washing hygiene, proper social distancing and maintain proper public health preventive procedures. Patients should be communicated on the safety measures practiced within the healthcare facility via educational video on social media and websites of healthcare organizations to ensure that patient feels safe. As patients feel safe with the mandatory safety measures taken, they will revisit healthcare facility to seek medical treatment. Furthermore, retirement of senior doctor professionals and losing of knowledgeable doctors can be resolved by rehiring these retirees as medical consultants within the healthcare practices.

The study has few limitations. Firstly, this research considered only the dimensions of Daniel Denison's model of organizational culture which affect the organizational performance. Future research needs to have consideration of other variables of organizational culture that affect the organizational performance such as job satisfaction and working environment. Furthermore, potentially important mediating variable such as organizational leadership that can affect the organizational performance can be included for future research. This leadership-performance relationship has been overlooked in most studies and should be included as it represents organizational climate and trust between leader and followers. Limited data size, constrained scope to healthcare industry and non-probability sampling technique poses limitations related to generalizability and transferability of findings. The dependent variable (organizational performance) was evaluated using the dimensions: productivity, efficiency, innovation and quality, but this was based on the respondents' perception. It would be very interesting to find key performance indicators to assess this variable, as this would give us more interesting results for the discussion of the topic. Lastly, future research should increase the size of population with more diverse participants as it can result to significant contribution to the results.

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KEY TERMS AND DEFINITIONS

Adaptability: It can be defined as ability to vary administrative functioning and leadership styles depending on the culture and environment in which they are operating.

Consistency: Consistency of an organization is how firm an organization is in implementing policies, procedures, and rules,

Involvement: It is ability of an organization to engage and involve members of the organizations and integrate them with the culture.

Organizational Culture: Culture is based on customs, beliefs and shared attitudes and reflects in written or unwritten rules which are considered as valid by the society. Similarly, organizational culture comprised of expectations, experiences, philosophy, as well as the values that guide employee's behavior and future expectations. In simple words, it is nothing, but the way things should be done in an organization.

Organizational Performance: The performance of the organization is assessment of to what extent an organization has achieved its set goals and objectives. Organizational performance can be financial

as well as non-financial performance. Financial performance includes aspects related to revenue, profits etc. while non-financial performance include organizations brand, employees, and other qualitative asses.

Chapter 18

The Role of Human Resource and Knowledge Management in Improving Service Delivery in Knowledge-Based Organizations in South Africa: Best Practices in the Wake of the COVID-19 Era

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ABSTRACT

The major goal of every organizational strategy is to enhance the effectiveness and efficiency of operation which could lead to organizational performance and success. However, the emergence of the COVID-19 pandemic has caused an abrupt change to the way most knowledge-based organizations work. For many knowledge-based organizations, periods of rapid technological changes and pandemic era are also periods of incessant struggle to maintain a high-performance work environment. These organisations are now beginning to consider the longer-term impact of COVID-19 including some potentially positive changes to the way that they work. Employees within these organizations were forced to work remotely for the first time during lockdown and had to adjust to working from home almost overnight while others were unable to work at all. The aim of this chapter was to determine the role of human resource management and knowledge management in improving service delivery within knowledge-based organizations.

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INTRODUCTION

With rapid changes in the business environment and the emergence of COVID 19 era, knowledge-based organizations are increasingly looking at their knowledge and human resources as their unique assets that can provide sustained competitive advantage through their products and services. A knowledge-based organization is a collection of people and supporting resources that creates and applies knowledge through continued interaction (Zack, 2003). Knowledge-based organizations have been characterized as enterprises in which the key asset is knowledge and its competitive advantage thus comes from having and effectively using knowledge (Zack, 2003). The core mission of knowledge-based organization is to acquire, manipulate and deploy information and knowledge. It strives to be a learning organization|| in which its members, both individually and collectively are continuously enhancing their capacity to produce results and adapt to changing circumstances. This type of an organization is guided by a commitment to organizational excellence through pursuits such as benchmarking best practices and the fostering of collaborative relationships among various stakeholders. Examples of knowledge-based organizations include government agencies, universities, the military, the law office, accounting firms, marketing firms, software companies and manufacturing companies, just to name a few.

Employees within various knowledge- based organizations were forced to work remotely for the first-time during lockdown whereby working from home for some other employees is a great experience as they found that they are lot more productive without the day-to-day distractions of an office environment. Technologies such as Zoom and MS Teams are used for their meetings and daily stand-up check-ins. However, other employees realised that they thrive on the personal interaction and vibe of a brick-and-mortar office space and could not wait to get back to their offices where they were not distracted by other tasks at their homes. Business organisations which were able to shift more quickly from an hour-based working model to an output-based working model are benefiting the most from the new way of working, with a likely increase in employee motivation as well. However, as outcomes replace hours, the performance management approach of the organisation also needs to shift from monitoring people to monitoring performance. This implies a greater focus on output and an emphasis on the employee's personal responsibility over the number of hours worked.

Some of the issues that need to be addressed are whether knowledge-based organizations' current performance management system is aligned with this shift approach, and whether all human resources and knowledge managers within knowledge-based organizations are suitably able to manage their employees in this new normal business environment. Therefore, one of the key tasks for every knowledge-based organisation is the effective management of human resources in order to provide a competitive advantage and good quality service delivery to their customers or clients. Benton (2002) described service delivery as an essential function in the relationship between government bodies and citizens. Service delivery is thus part of a complex relation between government, society and citizens (West, 2004). The South African Board for Personnel Practice (SABPP) (2012), the professional body of human resources, defines service delivery as an influencing and partnering approach in the provision of human resources services meeting the needs of the organisation and its employees which enables delivery of organisational goals and targets. Service quality consists of two dimensions, namely: technical and functional quality. Technical quality describes the outcome of the service delivery, in other words, what a customer is left with after service delivery while functional quality is concerned with service delivery and the perception of interaction a customer perceives during the delivery of the service (Storbacka, Strandvik & Grönroos, 1994).

Section 195(1) of the Constitution of the Republic of South Africa (1996) requires the following basic values and principles to strengthen service delivery, namely: democratic values and principles, a high standard of professional ethics, efficient, economic and effective use of resources and services be provided impartially fairly equitably and without bias based on the citizens' needs and priorities. As noted by Eigeman (2007) customers have a right to demand fast, accessible, good quality services at a modest cost from their suppliers in order to meet their needs, and this applies particularly to the government agencies as suppliers of key public services. However, over the past few years, South Africa has been experiencing a wave of service delivery protests across most provinces, amounting to a rebellion of the poor and marginalised. Many service delivery protests turned to public violence as some of the criminals are exploiting the situations as most of the protest actions take place under conditions characterised by malicious damage to public and private property and the looting of retail stores.

Poor service delivery thus raises questions about human resource management practices within the organization and its strategic goals could not be achieved, if the performance of human resources is poor and employees are not well-managed. The question that arises is: why is there a continuous poor service delivery and protests if human resource development is well practiced and employees are properly managed in these organizations? Human resources managers in knowledge-based organization are thus faced with a huge task of addressing these challenges in order to provide quality service to the communities or citizens and to achieve competitiveness. The provision of quality service delivery also rests heavily on the knowledge, skills and drive of the employees. There is therefore a need for innovative strategies and best practices for managing human resources in ensuring that knowledge-based organizations have the capacity to address the needs of the communities they serve and to consistently achieve quality service. The study by the Institutional Shareholders Services (ISS) (2016) on linking employee and customer engagement found that the behaviour and satisfaction of employees is directly linked to the quality of service, customer experience and profits. It is thus important for knowledge-based organizations to comprehend specific organisational factors that influence employee attitudes and behaviours that may in turn influence how customers evaluate service quality. As stated by Wright and Snell (1998) a rapidly changing and dynamic environment has also extended the focus of human resource management to include developing organizational capacity to adapt to changing environmental contingencies. As noted by Burke, Allisey and Noblet (2013) the manner in which an organization's human resources are managed can hinder or enhance its capacity and it is therefore critical that key stakeholders such as practitioners and researchers continually assess the influence of human resource practices and policies within the organization. The study thus looked at the best practices, strategies, models and theories that need to be developed and implemented for knowledge-based organizations to achieve quality service delivery.

THEORETICAL FRAMEWORK

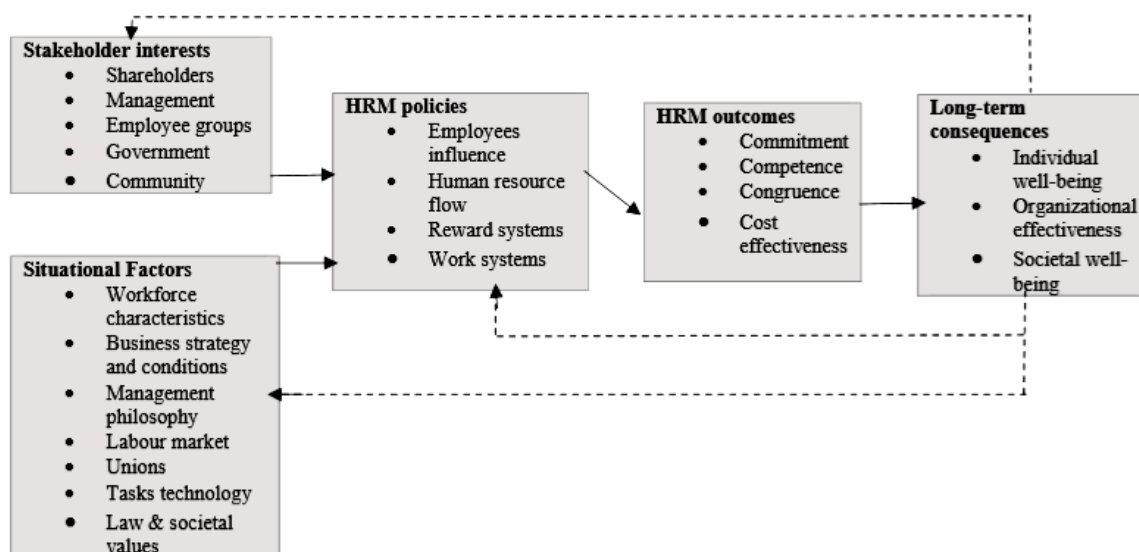
This section presents an overview of the models, theories and frameworks that underpin human resource development and practices in achieving performance outcomes as well as improving service delivery or providing quality service. These models and framings demonstrate a variety of ways in which human resource management is conceptualized and each speaks to different aspects of the dimensions of human resource and quality service. The conceptualization in the study was therefore guided by the Harvard framework of human resource management by Paauwe, Richardson (1997), SERVQUAL model by Parasuraman, Zeithaml and Berry (1991) and the Knowledge Management Model by Sagsan (2009).

Conceptual framework was adopted in this study to inform the development of competent and capability of human resource and knowledge management as well as the design of service delivery programmes within the organizations.

The Harvard Framework for Human Resource Management

The Harvard framework is a human resource comprehensive model developed by Paauwe and Richardson (1997), that takes a more holistic approach to human resource that include different levels of outcome. This model comprised of five critical components, namely: stakeholder interests, situational factors, human resource management policies, human resource management outcomes, long-term consequences, as depicted in Figure 1.

Figure 1. The Harvard framework for human resource management (Paauwe & Richardson, 1997)



The model starts with the stakeholder interests which include shareholders, management, employee groups, government and community. These stakeholder interests define the human resource management policies and at the same time, situational factors that include workforce characteristics, business strategy and conditions, management philosophy, labour market, unions, tasks technology and law and societal values, are also influencing these interests (Paauwe & Richardson, 1997). Situational factors and stakeholder interests both influence human resource management policies including human resource activities such as recruitment, training and reward systems. As noted by Paauwe and Richardson (1997), these policies can lead to positive human resources outcomes including commitment, retention, cost-effectiveness and competence, and can also lead to long-term consequences such as individual well-being, organizational effectiveness and societal well-being, if they are well implemented. Paauwe and Richardson (1997) argued that everything an organization do and measure in human resource can be divided into two categories: human resource management activities and human resource management outcomes.

The Role of Human Resource and Knowledge Management

- **Human resource management activities**- are day-to-day activities, including recruitment, compensation, training, and succession planning. These activities are often measured using HR metrics. These are so-called efficiency metrics. The cheaper we hire and the faster we train, the better.
- **Human resource management outcomes**- are the goals we try to achieve with the HRM activities. We recruit, we train, and we compensate to achieve certain goals/ outcomes. These outcomes include employee satisfaction, motivation, retention, and presence (Paauwe & Richardson, 1997).

Therefore, taking all these factors into account enables the organization to make human resources policy choices and appropriate resources flows.

Service Quality Model (SERVQUAL Model)

Parasuraman, Zeithaml and Berry (1991) developed four-dimensional conceptualization of service quality model called SERVQUAL, as a method to capture and measure the service quality experienced by customers with the emphasis on the development of quality systems in the field product quality. In the past decades, this model became essential to improve service quality giving organizations a competitive edge. Service quality is measured in five key dimensions that may cause customers to experience poor service quality as identified by Parasuraman, Zeithaml and Berry (1991), namely:

- **Tangibles**-the physical facilities, what is visible to the customers, for instance the staff, the equipment used and the appearance of the personnel, the decoration and cleanliness of an office building and all other facilities;
- **Reliability**- derives from the ability to perform the promised service dependably and accurately and it depends on to what extent the service is accurate and honest;
- **Responsiveness**- is about promptly and adequately responding to customer questions or complaints. It reflects the willingness of service providers to help customers and provide prompt service;
- **Assurance** - deals with the knowledge and courtesy of service providers as well as their ability to inspire trust and confidence; and
- **Empathy**-describes the caring and attention that an organization provides to its customer.

The study by Saleh and Ryan (1991) on analysing service quality in the hospitality industry also identified five gaps that can arise between the customer's needs and the service that an organization offers, using the SERVQUAL model, namely: not knowing what consumers expect, improper service-quality standards, the service performance gap, whether promises match delivery and consumer's expectation and perceived service. However, these gaps depend on size and direction of the four gaps associated with the delivery of service quality on the marketer's side, as noted by Mutiso and Kilika (2017).

Sagsan's Knowledge Management Model

A number of knowledge management frameworks have been proposed and some have been modified by various authors in as far as knowledge management processes are concerned, however, these processes vary depending on which type of knowledge intellectual capital the organization aims at improving. Sagsan (2009)'s model provides four basic processes, namely: knowledge creation, knowledge sharing,

knowledge structure and application of knowledge. Knowledge creation process happens through interactions between members of the organization (Demarest, 1997). This involves mobilization of internal and external resources to ensure that there is generation of new knowledge that facilitate the organization to achieve its goals (Nicholas & Steyn, 2017). As noted by Groop, Ketokivi, Gupta and Holmström (2017) knowledge creation includes identifying tacit from explicit one and vice versa. Knowledge can thus be created through the conversion of tacit to explicit knowledge, and can be shared through social and technological communications infrastructure (Sagsan, 2009). The study by Tseng (2017) on the effect that KM model have on the organization capabilities indicated that main focus of knowledge creation is sharing tacit knowledge via the process of socialization. For example, the organization may adopt conventional face-to-face interactions such as meetings and electronic communication channels such as forums or video conferences (Tseng, 2016).

Leadership behaviours are also considered essential to enhance knowledge creation in organizations. Therefore, visionary organizational leaders provide the organization with clear direction in terms of guidelines and what types of knowledge to create. The study by Tseng (2016) also revealed that organizations can enhance knowledge creation by cultivating organizational learning culture. Knowledge is also created through education, interaction, practice and collaboration as the different types of knowledge are shared and converted (Frost, 2010). Sagsan (2009)'s model, Nonaka and Takeuchi (1995) and Demarest's (1997) model, both share the concept of knowledge creation as powered by the flow of information within the organization, the concept that knowledge creation happens between the members of the organization and sharing of knowledge which moves knowledge from the person to the larger group.

Knowledge sharing basically means how organizational information is exchanged with each individual within the organisation. It refers to how information is conveyed from one individual to the other or from a group to individual and vice versa (Lohikoski, Kujala, Haapasalo & Aaltonen, 2016). As stated by Sagsan (2009) knowledge sharing requires the prerequisites of knowledge sharing mechanisms that allow teams, departments and groups to share their tacit and explicit knowledge through technological and social communication infrastructure channels. Social communication means informal working settings and it helps in transferring tacit to tacit knowledge while technological communication infrastructure is useful for structuring data and transferring knowledge timely (Sagsan, 2009).

THE ROLE OF HUMAN RESOURCE MANAGEMENT IN SERVICE DELIVERY

Knowledge and human resource management has been an important contributor to the success of any organizations. Armstrong (2006) described human resource management as a strategic and coherent approach to the management of an organization's most valued assets, the people working there who individually or collectively contribute to the achievement of its objectives. As stated by Kamoche (1997) human resource management consists of a number of basic tasks or activities including the recruitment, selection, compensation, performance rewards, rewards, training, development, promotion, performance management, grievance handling, and overtime management. Human resource management also encompass recruiting and selecting the right person, ensuring appropriate compensation and remuneration, offering incentives or appropriate rewards for performance, training and development opportunities, promotion, proper performance management and appropriate grievance handling. Recruiting the right person thus requires linking recruiting strategies to organizational needs while also fulfilling legislation such as employment equity.

On the other hand, Mehlape (2017) described human resource development as a process for developing and unleashing human expertise through organization development and personnel training for the purpose of improving organizational performance and services. Meyer (2007) further described human resource development as all the processes, systems, methods, procedures and programmes an organization employs to develop its human resources in order to equip employees to be able to contribute to organizational performance. But how well these activities are carried out within organizations so that the outcomes can lead to quality service delivery? According to Mehlape (2017) policies and practices involving workforce recruitment and retention, training and development, career progression, performance appraisal, employee relations can impact on the attitudes and behaviors of employees, and have the potential to undermine or enhance the effectiveness of employees. Proper management of employees is thus crucial for service organizations like municipalities precisely because employees' interface directly with customers who make evaluative judgement of the quality of service delivered by employees (Dzansi & Dzansi, 2010).

Chapter 11 of the White Paper focuses on the plans for staffing, human resource development and organizational capacity building, tailored to service delivery needs and the redirection of human and resources from administrative tasks to service provision, particularly for disadvantaged groups and areas. The Constitution of South Africa also emphasizes the need for quality service delivery and section 195 requires the public administration to cultivate competent capable public officials with good human resource management and development as well as career development practices to maximize human potential (Mehlape, 2017). Basic services are the fundamental building blocks of improved quality of life and therefore adequate supplies of water, electricity, toilets and sanitation are necessary for life, well-being and human dignity. Municipalities are the most basic units of government in the country and are tasked with providing basic services and fostering development in the regions they govern. Although, the South African Constitution assigns government sectors and municipalities the responsibility to mobilize economic resources towards the improvement of the lives of all citizens, however, most of these sectors are unable to provide good service delivery to the citizens they serve, especially in informal settlements and rural areas. The citizens are continuing to experience poor service delivery leading to continuous protests, especially in marginalized areas in South Africa. The meaning of good service delivery for the image that citizens have of the government is not always valued fairly although a good quality and affordable service delivery is a condition for the good image of government. High unemployment rate, high levels of poverty, poor infrastructure, and the lack of houses add to the growing dissatisfaction in poor or disadvantaged communities. The organizations that are best at delivering good customer service are the ones with the most well-managed knowledge and human resources processes. The provision of quality service is linked to human resource capacity, development and management and there is therefore a need to improve service delivery through developing human resources and enhancing their performance. However, in many instances, human resource management is not perceived to add much strategic value as most organizations often perceive it to be an administrative function aimed at ensuring that people are paid on time, employment contracts are signed and leaves are processed etc. Human resource managers should thus begin to see themselves as business drivers rather than administration function and human resource management practice be undertaken with a focus on strategic concerns of organizations on areas such as goal achievement, survival, competitiveness and superior customer service.

Development of a comprehensive strategy for quality service delivery as part of a broader focus on expanding their organizations is thus necessary. The adoption of New Public Management (NPM) has opened the possibility of human resource managers in improving organizational performance through the introduction of more flexible human resource management techniques and increased employee input.

As observed by Brown (2004) the human resource system relies on performance management for workforce flexibility and productivity. NPM strategy involves high-levels of organizational re-structuring, stricter performance management, accountability mechanisms and the creation of a more market-oriented culture that places greater emphasis on the needs of consumers rather than service providers (Osborne & McLaughlin, 2002). This strategy allows a more flexible and responsive approach to questions of recruitment, selection, performance management, retention, training and development of employees. NPM strategy also involves the application of physical, financial and human resources to realize organization's objectives and it is argued to be a flexible and market-based form (Hughes, 2003). Therefore, this strategy can be used or adopted by human resource managers within knowledge-based organizations for enhancing their quality service delivery.

KNOWLEDGE MANAGEMENT AND SERVICE DELIVERY

The ultimate goal of any government agency is to deliver quality services to satisfy the customers' needs. Fischer et al (2016) noted that organizations need to align themselves with their customers or clients in order to ensure the provision of quality services and be able to understand their needs. Clients' expectations keep on changing as the literacy level rises and therefore to meet their demand knowledge-based organizations have to rethink through their processes. Knowledge management has become increasingly important as organizations realize that effective use of their vast and varied knowledge assets and resources provides them with the ability to innovate and respond to fast changing customer expectations. The ability to create, store, disseminate, and utilize knowledge and expertise has thus become a primary way for knowledge-based organizations to compete. Knowledge has been regarded as a significant component of strategic organization in ensuring that innovation is enhanced and that organizational performance is consequently improved (Bloice & Burnett, 2016). The higher performance is associated with knowledge sharing mechanisms that actively encouraged the exchange of information across organizational units and across organizational boundaries.

Yusof and Ismail (2009) asserted that the more an employee in the organization is involved in the knowledge sharing process, the better is his or her performance. Increased performance will thus lead to increased service delivery. Distinct expertise thus needs to be shared between employees with a sufficient level of congruence to enable individuals to understand each other and work together towards their common goals from different perspectives. Organizational vision and value statements need to reflect the commitment towards a knowledge culture, and be effectively communicated throughout the entire organization through knowledge sharing. Knowledge sharing refers to how information is conveyed from one individual to the other or from a group to individual and vice versa (Lohikoski et al., 2016). Ghorbani and Khanacah (2021) further described knowledge sharing as the transfer or dissemination of various types of knowledge from one person or group to another person or group within the organization.

On the other hand, knowledge management is defined as the process of accumulating and creating knowledge and facilitating its sharing in a way that enables its effective application throughout the organization (Hajro, Gibson, & Pudenko, 2017). Knowledge sharing implies that, as the aged retire from employment, the knowledge they possessed it retained within the new young employees who replace them within the organization (Bromiley & Rau, 2016). However, internal knowledge cannot be easily transferred, although several forms of intellectual capital can be shared among employees, and this tacit knowledge can easily disappear once these employees leave the organization. The main goal of knowl-

edge management is thus to ensure that the acquisition process, integration and the use of knowledge is improved (Almeida, de Vasconcelos & Pestana, 2018).

From the perspective of service delivery, knowledge-based organizations are required to efficiently and effectively offer quality services to the citizens. Therefore, by implementing knowledge management practices, these organizations can deliver effective services and be able to function efficiently and operate in transparent environments characterized by accountability and social responsibility. Knowledge-based organizations need to communicate constantly with their clients so as to ensure that their needs are met and this enables knowledge sharing in the form of documented information which eventually becomes organizational knowledge (Chebet & Njuguna, 2020). The organization must make the knowledge accessible to many who can use it and ensure the format, flexibility, selection and integration are understood by all the interested party (Yuan, Lin & Zhuo, 2016). Various studies have been conducted on knowledge management and knowledge sharing in government agencies as well as knowledge-based organizations. Ali, Hussain, Konar and Jeon (2016) conducted a study on the effect of culture and knowledge sharing on the performance of hospitality services. The findings indicated that culture and knowledge sharing behavior have a significant effect on the service innovation performance. The study therefore recommended that organizations need to implement strong cultural team and knowledge sharing behavior to kick start performance growth. Hurnonen, Ritala and Ellonen (2016) also conducted a study on the impact that knowledge-integration practices have on the performance of the firm. The study identified that an interaction, teamwork, sharing, coaching, handling faults, direction of the knowledge in existence as the cultural features, aligning social relations based on knowledge management. Hurnonen, Ritala and Ellonen (2016) described teamwork as the level of actual support normally determined by the behavior of individuals involving the allocation and completion of activities through mutual sharing of goals that takes place in a given social or work environment.

Most of knowledge-based organizations need to also realized that tasks are better achieved through dynamic interaction and feedback, and as a result, these organizations should engage in effective sharing and integration of knowledge to achieve their defined goals. However, as stated by Sandhawalia and Dalcher (2011) convincing people to share their knowledge requires a combination of knowledge management capabilities, such as inculcating a level of trust among individuals and managers, and creating a no-blame culture within organizations and a rewards system. Knowledge-based organizations thus need to adopt an integrative approach to developing knowledge management capabilities infrastructure and processes that covers all potential sources of knowledge and reduces barriers to knowledge sharing and organizational learning (Sandhawalia & Dalcher, 2011).

However, as noted by Kim and Park (2017) most organizations have valuable knowledge about their products, processes management and technologies but most of them do not use this knowledge as much as they should to take full advantage of it. Therefore, organizations can use knowledge as a source of competitive advantage when they can create or acquire new knowledge, transfer it to the appropriate components of the organization, interpret this knowledge and combine it with the current knowledge of the organization and use it to achieve better performance (Stone et al., 2017). Knowledge management and knowledge sharing has therefore been recognized as the most essential elements in ensuring performance of any organization, and can also enable knowledge-based organizations to achieve high performance in the increasingly global and knowledge economy.

BARRIERS TO QUALITY SERVICE DELIVERY

COVID 19 has presented major challenges to knowledge-based organizations and delivery of service to their clients or customers as most of these organizations were not well prepared for online services. These organizations are thus facing a range of social, political and economic challenges globally, and many of which are having serious and on-going implications for employees and the people they serve. Large-scale downsizing and contracting out has also contributed to poor service delivery. Burke, Allisey and Noblet (2013) added that the economic downturn due to COVID 19 pandemic has impacted on government revenue globally and as a result, policy makers are under pressure to reduce large budget deficits, the responses have invariably involved significant job losses. Severe cost cutting strategies such as employee lay-offs, retrenchments and wage freezes are the most pressing concerns currently facing knowledge-based organizations during this new normal era.

Manyon (2019) noted that by 2050, the African population is estimated to be at 1.3 billion people of which 15-20 million will constitute well-educated youth and they will be either employed, underemployed or unemployed. For example, in South Africa, more jobs were lost in many knowledge-based organizations, for the past two years, due to COVID 19 lockdowns resulting to closure of businesses. The majority of these organizations are struggling on how they can effectively address heightened community demands while at the same time reducing personnel costs. All these challenges are particularly acute in the healthcare, law enforcement, education, social welfare etc., where the customer's needs are particularly complex and failure to respond to their needs can have severe consequences.

Human resource and knowledge managers in various knowledge-based organizations are therefore, faced with major challenges, not only in terms of recruitment, compensation and service provision, but also in relation to job security and workforce morale. The ability of public sector services to meet the current and future needs of their communities are fueled high levels of job strain. In the UK, for example, research undertaken by the Health and Safety Executive (HSE, 2005) found that the symptoms of work-related stress were significantly more prevalent in the public sector than in the private sector and that a higher proportion of public sector employees report working while ill. Health workers and practitioners in South Africa and globally, are working under immense pressure and a very stressful conditions due to COVID 19 pandemic that is spreading rapidly and millions of people are getting infected daily. Aiken et al. (2001) observed that employees responding to stress will not only impact on public sector employees themselves, but given the links between job stress and client-related outcomes, for example, patient satisfaction, and error rates in employee performance will also influence the quality of services available to communities.

The management of knowledge-based organizations during this period of economic downturn caused by COVID 19 thus presents a further challenge for human resource and knowledge management. The anticipated retirement of the baby boomer generation also places enormous pressure on knowledge-based organizations to retain valuable talent and attract suitably qualified replacements. Burke, Allisey and Noblet (2013) stated that voluntary turnover, a case in which the employee terminates the employment relationship when the organization arguably would prefer it to continue, also represents a significant challenge for public sector organizations. Factors that contribute to voluntary turnover includes environmental factors (employment legislation), organizational factors (proportion of temporary workers) and personal factors (age, work-family conflict) (Burke, Allisey & Noblet, 2013).

Human resource management in the public sector is also faced with the challenges of developing upstream preventative strategies that can intercept the quit process and minimize the loss of valuable

talent (Burke, Allisey & Noblet, 2013). Knowledge-based organizations that are facing economic crises most often respond by downsizing and attempts to reduce labor costs for organizational survival. All these challenges have serious implications for the volume and complexity of demands facing public sector organizations and the extent to which their services can meet these demands (Burke, Allisey & Noblet, 2013). Flexible approach to human resource management in economic uncertainty can create a more sustainable organization, which maintains a high-value to service delivery. An effective human resource planning process can thus be useful in conducting strategic planning by bringing a systematic approach to succession planning, integrating its functions horizontally around meeting desired needs. Human resource planning thus needs to focus on identifying shortfalls between labor demand and supply, and closing current or future gaps in talent

FACTORS ENABLING QUALITY SERVICE DELIVERY

The attitudes and behaviors of employees have always been critical to the performance of employees, however in an organization characterized by heightened demands and declining resources, motivating, attracting and retaining employees becomes critical (Aina & Atan, 2020). As noted by McGurk (2010) management and leadership development interventions can be used to improve the quality and efficiency of public sector services, while also improving employee satisfaction and wellbeing outcomes. Increased responsibility and greater intensification of work, gender equality and performance management also present changes to human resources management practices and to the social fabric of societies in which the organizations operate (Burke, Allisey & Noblet, 2013). Performance management systems are seen as mechanisms for monitoring and controlling employees while also improving service delivery. Human resource managers also provide individualized reward systems that is directly associated with overall organizational performance.

The implementation of human resource management policies is a key determinant of organizational performance. Boohene and Asuinura (2010) stated that the effectiveness of human resource practice, particularly employee selection procedures, performance appraisal, rewards and benefits management, and employee training and development often have a direct bearing on organizational productivity and performance. Therefore, if human resource policies and processes are developed and implemented effectively, human resources will make a substantial impact on the firm's performance (Mehlape, 2017). Johnston (2001) concur that the underlying guiding principle of best practice is the valuing and rewarding of employee performance. Pfeffer (1998) outlined best practices of successful organizations which including employment security, selective hiring of new personnel, self-managed teams, decentralized high compensation relative to performance, extensive training, reduction in barriers and extensive sharing of financial and performance information. The use of more flexible employment contracts and compensation strategies, recruitment methods geared towards a more transient workforce, as well as a greater reliance on technology are now important components of education for human resource practitioners (Burke, Allisey & Noblet, 2013). Some of the factors enabling quality service delivery within organizations are described as follows:

- **Employee motivation**

Adams (1963)'s equity theory of motivation attempts to explain how people strive for fairness and justice in social or give-and-take relationship, and how a person's motivation to act in a certain way is propelled by feelings of inequity. Employees who might perceive inequity, for example, in pay, promotion, reward etc. may change their attitude towards customers they serve. Adams (1963) equity theory stated that employees usually make comparisons about job effort and rewards and expect equity in terms of efforts and rewards. It is therefore important for human resource managers to fully comprehend employee motivation and be aware of its implications when they make decisions concerning such things such as pay, bonus, fringe benefits, promotions etc.

- **Organizational justice**

Organizational justice is another approach in understanding service delivery problem and it focuses on people's perceptions about fairness in the workplace (Kang, 2007). Individual work attitudes including commitment and service behavior are associated with perceptions of fairness in the workplace, and should employees experience inequity in terms of their organizations' human resource management practices, this could result in behavioral and attitudinal changes that may be detrimental to service delivery (Kang, 2007). Procedural justice is an example of organization justice that is also important to employees as it offers them some assurance of fairness of human resource management practices such as promotion, performance evaluation, grievance handling, etc. (Kreitner and Kinicki, 2008). Positive perceptions of procedural justice can thus be enhanced by involving employees in decision making.

- **Employee commitment**

Robbins, et al. (2007) define commitment as a state in which an employee identifies a particular organization and its goals, and wishes to maintain membership in the organization. It ranks amongst the most important types of employee attitudes in response to what happens to them at the workplace (Kreitner & Kinicki, 2008). It is believed that maintaining high levels of commitment in employees is critical for organizational success because committed employees will act in the best interest of an organization (Fischer, 2004). Dzansi and Dzansi (2010) identified political interference, employee justice and commitment and citizenship behavior as the key variables related to the provision of quality service delivery in South African municipalities.

- **Training and Development**

Ganihar and Nayak (2007) described training as a learning process that allows employees to acquire new skill knowledge and attitude that bring about a permanent improvement in the ability and behavior that will lead to more efficient performance. Boohene and Arinuir (2011) further described training as the use of systematic and planned instruction activities to promote learning. It is the main mechanism of human resource development and McGuire (2014) define it as systematic acquisition and development of the knowledge, skills and attitudes required by employees to adequately perform a task or job or to improve performance in the job environment. The Human Resource Development Strategy (HRDS) (2002) was developed to support a holistic approach for training and development in the South African public sector. In order to actualize its constitutional mandate of creating a better life for all, the govern-

ment envisages a public sector that is guided by the ethos of service and committed to the provision of high-quality services (Venter et al., 2007).

According to Kaufman (2014) the purpose of the Skills Development Act was to raise skill levels in the workplace by requiring companies to invest in at least one (1) percent of payroll on workforce training. Skills Development Amendment Act 37 of 2008 thus mandates every employer to appoint a Skills Development Facilitator (SDF) for the purpose of managing human resource development in every organization. The amended Skills Development Act aims to improve the quality of the sector skills to ensure better investment of human resource development to ensure an enhanced return on investment. Employees are the most valuable resources in every organization and their development can help the organizations realize their objectives by creating a competent, dynamic and motivated employee force (Mehlape, 2017). Human resources are developed through training, learnerships, mentorships and Performance Management Development System (PMDS) (Public Service Commission, 2010) and if employees are well trained and developed, there will be an increase in productivity in organizations. The development and training of employees is thus necessary for an organization to improve quality and to meet the challenges of global competition and social change (Noe, Hollenbeck, Gerhart & Wright, 2004). However, as stated by Lauby (2011) human resources professionals are realizing that the fast-paced, ever-changing digital world impacts their jobs and workplaces because technologies are evolving every day. This requires human resource professionals to upgrade their skills and knowledge in order to meet the requirements of the new generation (Mehlape, 2017).

- **Talent management and leadership development**

Talent management integrates organisational objectives with the employees' knowledge and skills that facilitates employees in serving clients or customers and producing good quality products and services for organisational and stakeholder satisfaction (Collings et al., 2018). Some of the reasons why any business organizations should invest in talent management include: attracting top talent, employee motivation, continuous coverage of critical roles, increase employee performance, engaged employee's talent, retain top talent, improve business performance and ensuring quality service delivery or higher customer satisfaction. Human resource managers can work tirelessly recruiting and hiring the right people and also spend more time redesigning performance and rewards programs, however, the whole process will be a wasted effort if they are unable to identify, assess, manage and develop the key talent among their employees.

Talented employees refer to those individuals who can make a difference to organizational performance either through their immediate contribution or in the long-term by demonstrating the highest levels of potential (Tansley et al., 2007). Talent development can be described as a process of changing an organization, its employees, its stakeholders, and groups of people within it, using planned and unplanned learning in order to achieve and maintain a competitive advantage for the organization (Davis & Davies, 2010). Talent development and management program is thus crucial to any organization as it creates a framework that accommodates and motivates high-potential employees to develop their careers and fill leadership positions faster than average employees. Knowledge-based organizations can benefit from the principles of identifying crucial job skills, knowledge, social relationships and passing them on to preparing future leaders, thereby ensuring the seamless movement of talent within the organization. On the other hand, Weiss and Molinaro (2005) describe leadership development as the expansion of a person's capacity to be effective in leadership roles and processes. As stated by Van Velsor and McCauley

(2004), one way of expanding a person's leadership capacity includes help to develop knowledge, skills and abilities that the organization values with regard to leadership. Weiss and Molinaro (2005) further stated that investments in leadership development pay off in terms of creating a sustained competitive advantage that will propel organizations forward in the 21st century economy or digital economy. However, the design of a leadership development initiative should also be grounded in succession planning or management and anchored in the organization's size, strategy and resources, as noted by Day (2007). White (2018) defines succession planning as a talent management process that builds a pool of trained employees who are ready to fill key roles when leaders and other key employees step down. Most business organizations thus regard talent development programs as one of the tools that develop future leaders' skills and expand succession planning in multiple roles. Knowledge-based organizations thus need to develop programs that describes all processes to assess, develop and manage talent and leadership. However, human resource managers need to also understand their employees as that will make it easier to develop talent and prepare leaders in the new normal business environment and modern workplace.

CONCLUSION AND RECOMMENDATIONS

Proper management of human resources and knowledge management lead to diverse competent and well managed workforce that is capable of and committed to delivering high quality services to the customers. It is thus necessary for the human resources in organizations to be committed to their work by providing services to the people at the right time rather than being forced to provide those services. Chlivickas (2015) further stated that it is important to improve the capabilities of human resources in knowledge-based organizations in order to transform the contemporary society and ability to react to increasingly rapid changes, adaptability and competitiveness. Talent management, leadership development, performance management and training and development are also regarded as some of the factors enabling quality service delivery. Therefore, if employees are well trained, there will be provision of quality services while talent management allows organizations to stay competitive, drives innovation, helps form productive teams, decreases turnover, leads to strong employer branding, attract top talent, continuously cover critical roles, retain top talent and improve competencies for future growth and develop sustainable performance.

Human resource and knowledge management systems should also be designed in a way that creates an environment that satisfy employees and their needs so that they can translate the same to their customers. The customers' perception is based on several dimensions of both the product and the service personnel such as technical competence, motivation, positive attitudes and knowledge of the product, organization and the customers' needs. Knowledge-based organizations thus need an understanding of the consumer perceptions of the quality and the way service quality is influenced while also promoting knowledge sharing among employees and customers. Performance management is also regarded as an important part of the process of managing human resources within knowledge-based organizations, aiming at achieving employee and organizational goals. Knowledge-based organizations can enhance or improve their performance by adopting effective performance management techniques and ensuring that employees have the capacity to derive goals from the mission statement and use accountability, performance standards and measures to enhance both organizational and employee performance. Targets setting and benchmark competition can also be used as they have a positive impact on outcomes and will improve the effectiveness of their services. Knowledge-based organizations can therefore improve service delivery

by focusing on goals, objectives and targets, mobilizing employee capacity and potentials, ensuring high quality standards, accountability for achieving objectives, ensuring employee training and development.

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KEY TERMS AND DEFINITIONS

Coronavirus Disease (COVID-19) Pandemic: Coronavirus disease (COVID-19) is an infectious disease caused by the SARS-CoV-2 virus. Most people infected with the virus will experience mild to moderate respiratory illness and recover without requiring special treatment. Since the year 2020, COVID-19 affected almost all countries and more than 50 million people around the world. It has governments operating in a context of radical uncertainty, and faced with difficult trade-offs given the health, economic and social challenges it raises.

Human Resource Development: Human resource development as a process for developing and unleashing human expertise through organization development and personnel training for the purpose of improving organizational performance and services. human resource development as all the processes, systems, methods, procedures and programmes an organization employs to develop its human resources in order to equip employees to be able to contribute to organizational performance.

Human Resource Management: Human resource management is a strategic and coherent approach to the management of an organization's most valued assets, the people working there who individually or collectively contribute to the achievement of its objectives. It encompasses recruiting and selecting the right person, ensuring appropriate compensation and remuneration, offering incentives or appropriate rewards for performance, training and development opportunities, promotion, proper performance management and appropriate grievance handling.

Knowledge Management: Knowledge management is the explicit and systematic management of intellectual capital and organizational knowledge, as well as the associated processes of creating, gathering, validating, categorizing, archiving, disseminating, leveraging, and using intellectual capital for improving the organization and the individuals in it. It includes all of the interacting and interdependent elements that pertain to monitoring and controlling knowledge such as creating and acquiring knowledge, using knowledge, retaining knowledge and sharing knowledge.

Knowledge-Based Organization: Knowledge-based organization is a collection of people and supporting resources that creates and applies knowledge through continued interaction. Knowledge-based organizations have been characterized as enterprises in which the key asset is knowledge and its competitive advantage thus comes from having and effectively using knowledge. Examples of knowledge-based organizations include government agencies, universities, the military, the law office, accounting firm, marketing firm, software company and manufacturing companies, just to name a few.

Service Delivery: Service delivery is an influencing and partnering approach in the provision of human resources services meeting the needs of the organization and its employees which enables delivery of organizational goals and targets. It is thus part of a complex relation between government, society, and citizens.

Chapter 19

Cross-Functionality in Practice: Electronic Performance Monitoring

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ABSTRACT

Cross-functional integration is a topic of discussion in many different disciplines. Electronic performance monitoring (EPM) is the practice of managing employee performance digitally. It is also a key example of cross-functionality. The authors reflected on organizational practice and existing literature to demonstrate the interconnections between different functions supporting EPM. A range of professions and functions play important cross-functional roles in the design, use, and implementation of EPM systems in organizations, such as IT and security, legal and data protection, and health and safety, among others. Barriers to cross-functional integration involving HR and EPM are identified, and recommendations are offered on how to overcome such barriers in practice. The practice and design of EPM serves as a powerful example for raising more explicit awareness and understanding of the opportunities and challenges affecting how HR integrates and works with a variety of other interdependent functional and professional groups and roles.

INTRODUCTION

Over the last twenty years, remote working has increased slowly over time. In 2020, the numbers have risen significantly for health and social reasons associated with the Covid-19 global pandemic. This development has had a major knock-on effect on Human Resources (HR) and the way in which organizations manage and support their workforces, especially in international organizations (Caligiuri *et al.*, 2020). These changes have been commented on and captured in a variety of papers and special issues on technology in the workplace and explorations of more virtual work experiences (e.g., Hodder, 2020; Kniffin *et al.*, 2020). Many of these changes are reflected in the adoption of digital tools to recruit, select,

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onboard and train employees. Many organizations are now adopting new digital approaches, platforms, software and applications to monitor and manage remote employees' performance and collaboration (e.g., Aloisi & De Stefano, 2021; Jensen *et al.*, 2020; Wang *et al.*, 2020). The successful implementation of these changes involves HR as well as multiple related functions within organizations. In particular, the move to greater remote working highlights how HR professionals and their partners need to work with greater cross-functionality and integration to support today's workforce, to meet employer information needs and engage employee interests.

BACKGROUND

Cross-functionality has been defined as “the awareness that organizational actors have of the coupled and integrated nature of processes across various business units” (Rowe *et al.*, 2005, p. 521). Also often called cross-functional integration, this concept plays an important role in everyday practice in many management disciplines such as: marketing, logistics, product development and sales (Jeske & Calvard, 2020a; Foerstl *et al.*, 2013; Oliva & Watson, 2011). However, very few articles have explored cross-functional integration involving the HR function (for exceptions, see Anthony *et al.*, 2014; Marques, 2006). There is little evidence of a systematical body of research to gain to a broad understanding of this concept in the HR domain, despite the fact that the profession already engages in efforts related to cross-functional integration in terms of how HR collaborates, communicates and cooperates with other disciplines regarding people management practices.

At the same time, the notion of cross-functionality is implied in many works by HR scholars such as David Ulrich's conception of HR as a professional services function overlaying entire organizations (Ulrich & Dulebohn, 2015) or Jody Hoffer Gittel's theorization of an effective HR strategy based on relational coordination practices spanning various boundaries and functions (Gittel, 2000). Indeed, many HR professionals and other function representatives might not explicitly recognize that these efforts are cross-functional in nature.

MAIN FOCUS OF THE CHAPTER

The current paper addresses cross-functionality in HR practice as related to the example of electronic performance monitoring (EPM) of employees. The chapter is organized in three sections on a) the cross-functionality in relation to HR, b) the links between functions due to cross-functionality, and c) an overview of the various professionals and functions involved in EPM. All sections weave together the social, managerial and technical aspects that foster cross-functionality. The focus on EPM provides an original exploration of HR practice, which expands on limited research in this area to date. The goal of this paper is therefore to provide answers to the following research questions:

- (1) What kind of professionals and functions are involved in EPM as an example of cross-functionality?
- (2) What are the challenges and recommendations that can be deduced from this example for general HR practice involving technology at work?

Cross-Functionality and the HR Function

Pellathy *et al.* (2019) outline the different dimensions of cross-functionality and more specifically, cross-functional integration. They define cross-functional integration as “an ongoing process of collaboration, coordination and communication in which the different internal functions that manage a company’s supply chain work together to maximize outcomes for their firm and external exchange partners” (Pellathy *et al.*, 2019, p. 5). While their paper is derived specifically from the supply chain management literature, where cross-functional collaboration and teamwork are common themes (e.g., Khanuja & Jain, 2019; Li *et al.*, 2019), Pellathy *et al.*’s (2019) definition can be readily adjusted to include HR processes and their relationships with other business functions.

Accordingly, we build on and extend Pellathy *et al.*’s (2019) definition of cross-functional integration to encompass HR processes: *Cross-functional integration is a process involving collaboration, coordination and communication among different functions responsible for people management processes in order to maximize the outcomes for their organization and external partners.* Indeed, as we will show in this paper, cross-functionality is already an important component in EPM. This work is therefore based on the amended definition we based on the work by Pellathy *et al.* (2019) and Rowe *et al.*’s (2005) premise that organizational actors need to possess cross-functional awareness over organizational processes.

The three dimensions - cross-functional collaboration, coordination, and communication - proposed by Pellathy *et al.* (2019) can be related to many existing HR endeavors and activities. In terms of cross-functional *collaboration*, HR has in recent decades faced significant pressures to engage in greater cross-functionality as its function risks being relegated to a mere administrative role in many organizations. This development risks obstructing prospects of future cross-functional collaborations involving HR (Pritchard, 2010). As we will demonstrate, however, several functions – including HR – are involved in EPM, reflecting one potential area of practice for cross-functional integration via greater collaboration (Schrage *et al.*, 2019).

Regarding the cross-functional *coordination* facet, we can note that the core function of HR is to coordinate the influx, development and replacement of labor and talent according to the needs of other business functions. This coordination ensures that other functions can meet agreed upon organizational goals and objectives. This means that HR naturally already engages in this form of cross-functionality, although HR literature may not necessarily explicitly theorize it as cross-functional. Job rotation, cross-functional project teams and meetings may be effective ways to achieve efficient coordination between HR and other functions (e.g., for similar evidence from sales and marketing functions, see Le Meunier-Fitzhugh & Massey, 2019).

The third and final facet is cross-functional *communication*. This aspect is already – to varying degrees – reflected in many HR communication initiatives. The decisive difference is that HR often plays an administrative rather than a strategic role and thus may only enjoy limited participation in strategic decisions and communications. Nevertheless, in the context of EPM, resulting communications and data flows often take place across all functions of the organization and like many other HR practices, involve all employees and leaders to varying degrees.

All three facets associated with cross-functional integration – collaboration, coordination, and communication – are critical aspects that foster and increase the likelihood of strategic HR initiatives such as collaboration-based HR systems and innovative work behaviors (Colakoglu *et al.*, 2021). Good communication and coordination can increase the complementarity in HR and business strategies. Research has shown that such complementarity can support knowledge management, which in return improves

innovation performance (Trivedi and Srivastava, 2021). The next section explores EPM as a quintessential example of HR and cross-functionality in practice.

EPM: A Cross-Functional Practice Linking Functions

Electronic performance monitoring (EPM) goes back 40 years and has supplemented traditional forms of employee monitoring, now gradually replacing them (Office of Technology Assessment, 1987). EPM can be defined as the “now-common use of technological means to observe, record, and analyze information that directly or indirectly relates to employee job performance” (Ravid *et al.*, 2020, p. 101; see Bhawe, 2014; Stanton, 2000). Numerous applications exist today to monitor employees in different ways (Jeske, 2021). These can be installed on devices or run via browsers and are now used by employers to obtain greater information about individual performance, performance interactions between team members and general statistics about the workforce. Many of these applications provide time, application and communication tracking and recording facilities. In addition, EPM might involve video, location, data and call monitoring (Ravid *et al.*, 2020; Tursunbayeva *et al.*, 2021).

The goal of many of these tools is to generate information about the degree to which employees perform their work as expected, assess their productivity and enable managers to monitor larger groups of people (Stanton & Julian, 2002), all aspects that are particularly important when the workforce is working remotely. Employees are now routinely monitored in ways that can be variously continuous or intermittent, obvious or surreptitious, and more or less intrusive, depending on the software and legal circumstances that require consent and limit monitoring (Chen & Ross, 2007; Stanton, 2000; Wells *et al.*, 2007). We argue that four motives are most relevant for the current discussion around EPM as a cross-functional practice – to monitor performance, assess teams’ productivity on a large scale, their engagement or sentiments as well as personal and information security.

First, performance management is most well-known in terms of its traditional monitoring motive. Employers and managers want information about how individuals and teams are doing in relation to different performance standards (e.g., Aloisi & De Stefano, 2021) in order to generate attendance and performance records for appraisals, promotions and potential disciplinary proceedings. Performance information, often based on time tracking, can support developmental feedback, increased transparency (e.g., productivity levels and loss prevention) and generate input for people development initiatives (Brown *et al.*, 2019). In addition, by capturing details about the use of applications, managers can assess the extent to which the workforce engages in behavior that supports communication or suggests distraction (e.g., by monitoring application switching).

Second, information can be collected for numerous teams simultaneously and in detail. Such productivity information on a large scale may then show managers, in visual format, the workflow and downtime patterns across multiple functions. And by extension, many of these aspects also align with the focus in the accounting and financial functions which often take responsibility for human capital valuation and human asset accounting (Fulmer & Ployhart, 2014).

Third, other EPM tools generate information about employee engagement and sentiments by tracking and analyzing online information submitted by employees on their company platforms (e.g., sentiment analysis). This can then generate context and situational cues for training interventions and information campaigns (see Laird *et al.*, 2018; Kalischko & Riedl, 2021). Cross-functional parallels exist in terms of how functions such as marketing consider the concerns of their (external) customers rather than internal ones in the case of HR. In addition, information about the current, as well as potential future,

Cross-Functionality in Practice

employee experience is additionally considered in employer branding activities, many of which involve a combination of different functions such as HR, marketing, corporate communications and operations (Theurer *et al.*, 2018).

Fourth, many employers are monitoring employees, not just for performance and productivity purposes, but also to assess personal and information security issues within the organization. In high-risk professions, such monitoring moreover serves to locate and track employees at work (e.g., in mining and other dangerous jobs). This monitoring is often expanded to include surveillance-type approaches in order to prevent and tackle illegal misconduct and the problematic usage of organizational data and resources (Indiparambil, 2019; Yost *et al.*, 2019). It is here that the HR function crosses paths with the legal, security and information technology (IT) functions.

In sum, numerous functions may be directly and indirectly implicated when EPM is implemented in organizations, each of them with a different stake, area of responsibility, and liability. The following section provides more detail regarding the kinds of professionals and functions that are often involved.

Professionals and Functions Involved in EPM

Having established the general connections between HR and other organizational functions, this section focuses on the first research question: What kind of professionals and functions are involved in EPM as an example of cross-functionality? We furthermore give examples of challenges and recommendations in line with our second research question: What are the challenges and recommendations that can be deduced from this example for general HR practice involving technology at work?

The following paragraphs provide specific examples of professionals often located in other functions than HR, who play an important role in terms of how EPM systems are designed, selected, implemented, operated, and evaluated (see discussion around high-performance work systems by Chillakuri & Vanka, 2021). The number and types of professionals and functions will vary across organizations, depending on relative size, country, industry and design choices. For example, some organizations create their own EPM solutions, which necessitate product developers and technical support staff – professionals who are not necessarily involved to the same degree and only involved when organizations opt to purchase an EPM solution from a third-party vendor.

The current set of professional groups and organizational functions was identified based on the authors' research and applied industry collaboration in this area as well as their surveys of relevant information in academic and practitioner literature (Jeske & Calvard, 2020a; Jeske & Kapasi, 2018; Jeske & Santuzzi, 2015; Jeske, 2021). We start with HR as the core function leading EPM efforts in most organizations. The order in which we present these professionals does not indicate importance, however. Many functions will play different roles at different times (e.g., when EPM solutions are first considered and a choice is made, through to implementation of the chosen solution, and customization, utilization, and evaluation of the applications).

HR Professionals

It is often up to HR professionals to set general guidelines for performance management, promotion rounds, disciplinary procedures, and similar practices. EPM solutions should not undermine such processes but complement them. For example, it is important to state how information should be used in appraisals and promotions. This includes clarifying if the information gained from EPM will replace or

complement managerial feedback and personal interactions with employees. The research on EPM has shown mixed results over its effects on performance and productivity (Claypoole & Szalma, 2019; Ravid *et al.*, 2020). Furthermore, HR professionals will need to outline good reward management practices that enable employees to remain visible and receive recognition for their work, especially for employees who work remotely (Hafermalz, 2020).

The rapid adoption of new monitoring tools during the first year of the Covid-19 pandemic did not coincide with a simultaneous review of existing HR policies in many organizations. HR professionals have been criticized for the “short-sightedness of personnel organization policies” (Aloisi & De Stefano, 2021, pg. 11). Indeed, many organizations still maintain policies related to performance management, work-life balance, and health provisions that predate the pandemic (Lockwood and Nath, 2021). Due to increased employee monitoring, reports of presenteeism among remote workers have significantly increased over the last two years (e.g., Bhatini & Kandathil, 2020; Bulińska-Stangrecka *et al.*, 2021; Sinclair *et al.*, 2020). This is unfortunate as guidance around best practice regarding employee monitoring often fall within the remit of HR, especially when new performance standards are established.

In future, HR can potentially do more to identify their own metrics to assess the benefits of EPM solutions in other analytical areas, such as employee turnover, employer reputation, and employee morale, which will further involve employee representatives, data analytics staff, and mental and occupational health professionals (e.g., Sinclair *et al.*, 2020; Wang *et al.*, 2021).

Work Design Experts

The topic of work design, during and after the pandemic, has become an important topic of discussion following the rapid move to remote work (Kane *et al.*, 2021; Kniffin *et al.*, 2020; Wang *et al.*, 2020). The extensive adoption of EPM tools has intensified this discussion. Over the course of the pandemic, the question of how organizations should design, employ, and evaluate their monitoring systems became more urgent, particularly in relation to how monitoring should be implemented in a way that recognized the ethical, cultural, and privacy dimensions of such tools (e.g., Kalischko & Riedl, 2021; Sherif *et al.*, 2021). How EPM is implemented can affect the psychological contract perceptions of employees, that is, the often implicit expectations employees (e.g., Tomczak *et al.*, 2020). This is particularly important where EPM tools severely restrict preferred or expected work design features, such as individual autonomy or self-direction at work (see Aloisi & De Stefano, 2021; Bathini & Kandathil, 2020; Jamal *et al.*, 2021; Wang *et al.*, 2021).

Creating appropriate monitoring conditions that promote trust, recognize the inter-dependent nature of some roles (e.g., individual vs. team-based monitoring; see Welter & Ensslin, 2021), and foster the use of appropriate customization and co-creation practices to involve employees are all ways to reduce resistance and increase adoption of such tools (e.g., Martin, Wellen, & Grimmer, 2016). Such conditions can furthermore help to create a work environment that supports, rather than lowers, remote workers' performance and employee well-being (Bilotta *et al.*, 2021; Jamal *et al.*, 2021). Evaluation rounds can be further used to explore and counteract the potentially negative effects of monitoring settings on employees (Jeske & Santuzzi, 2015). It is, for example, important to check that critical performance dimensions for different roles are adequately captured (e.g., creativity, innovation, and flexibility criteria). Many of these aspects can involve inputs from professionals in other functions too, such as instructional designers and health professionals (see later sections below).

Legal Representatives and Data Protection Officers

Another important group of professionals, many of whom advise employee groups at work, include legal representatives responsible for minimizing the risks of EPM for the organization from a legal standpoint. This group includes data protection officers. These professionals are tasked to explore which software features could create legal issues in the future. For example, some EPM vendors are located in different countries, which means employee information will be potentially stored in those locations. Most organizations are subject to liability in the case of data breaches in the countries where they operate. Ensuring that they are in compliance with legal and insurance statutes means that these professionals need to be involved at the beginning when an organization first decides to create new EPM solutions or when the organization is purchasing an application from a third-party vendor.

Furthermore, many legislative and policy frameworks require organizations to notify their employees about monitoring and to seek agreement (e.g., in employment contracts) before monitoring can commence. These professionals get involved when concerns over insurance and liabilities arise, as organizations will have to monitor compliance (Leclercq-Vandelannoitte, 2017; Leicht-Deobald *et al.*, 2019). Finally, legal professionals and data protection officers in legal functions will often be involved when employees, managers and teams are investigated due to potential data breaches, data misconduct, or discrimination claims (many claims will be investigated together with employee representative bodies).

IT and Security Professionals

The organizational circumstances surrounding employee data collection and use will determine which professionals are involved and to what degree the EPM solution is adopted in an organization. IT and security professionals are commonly involved to varying degrees. In the case of cyber-resilience, many efforts are cross-functional, involving the HR function as well as many others throughout an organization (see Abraham & Sims, 2021). For instance, the involvement of multiple professionals from various departments depends on the sensitive nature and the location of the information that is collected. This can quickly become a complex task in larger and international organizations (in this case, legal representatives may need to be consulted). Other IT and security issues include the increasing likelihood of privacy invasions due to EPM tools in the Covid-19 era (Ravid *et al.*, 2021) and the increasing awareness of risks posed due to the use of personal devices by remote workers. Central to this is the need to review device security, data collection, data processing and HR analytics projects that rely on employee data (Tursunbayeva *et al.*, 2021).

The complexity and quality of the data and technical requirements involved (in data collection and storage) will depend on the extent to which the EPM solution will feature monitoring above and beyond time and task tracking. Certain demands on IT and concerns about security can become higher and require more manpower and resources. This applies, for example, when organizations seek to capture audio tracks, visual data, and location information and use several devices and applications to monitor data usage and transfers (Indiparambil, 2019). The use of third-party vendors creates supply chain risks, while compatibility of third-party software with company devices, access management and tool integration can create novel challenges for IT and security professionals regarding the effective implementation of EPM solutions. Given these considerations, it is important to incorporate the viewpoints and experience of IT and security professionals early on when potential EPM solutions are first considered.

Employee Representatives

Employee representatives are usually representatives from different functions in the organization and can play an important role in crafting guidance for employees and employers alike when EPM is first introduced and when problems occur with how EPM data is utilized within the organization – a challenge common to many HR initiatives (second research question).

In many work contexts and countries, employees retain the right to bring grievances about their work experiences to works councils, unions, or similar representative bodies. Depending on the status of the organization (public vs. private), the industry to which the organization belongs (e.g., banking or retail), the cultural dimensions (e.g., such as uncertainty-avoidance, see Wang *et al.*, 2018), employees may have different rights and expectations as to how they are monitored at work (Bernstrøm & Svare, 2017). The impact of cultural values and expectations also affect remote workers (Biron *et al.*, 2020), including those who are monitored electronically (Sherif *et al.*, 2021). Especially when EPM is new to the organization, the perceived mismatch between cultural and leadership values (Abraham *et al.*, 2019) can give rise to conflicts between employees and management. Furthermore, the nature of the monitoring employed (i.e., pervasiveness, types of data collected) can furthermore trigger conflict and the need to reach agreements with employee representatives prior to the introduction of new EPM solutions.

Instructional Designers and Trainers

As is the case with all digital tools introduced, organizations need to ensure that managers and employees are onboarded to new technology and trained ahead of time so that they know how to use the applications and data appropriately. Human Resource Development (HRD) initiatives are often supported by designers and trainers. The pandemic highlighted the need for their support and involvement (Arora and Suri, 2020; Bierema, 2020). While third-party vendors might usually provide some free online training materials, many organizations will create their own learning provisions, especially when they create their own EPM solution. This will often involve instructional designers and trainers. When organizations have highly trained workforces (Laird *et al.*, 2018), and foster technological expertise (Leclercq-Vandelannoitte, 2017), it will be easier to onboard manager and employees to these EPM tools. This emphasizes the importance of training in relation to general HR practice involving technology at work (see also our second research question).

Given the nature of EPM and how such applications connect various professionals in the organization, such training may not only feature an onboarding to the application, but additionally require training around statistics and how these should be interpreted, extracted and handled, in terms of data storage and privacy (Ball, Daniel, & Stride, 2012; Vatcha, 2020). This is important given the possibility that managers move from human-centric to more algorithm-reliant decision making (Leicht-Deobald *et al.*, 2019), when they are not aware of data capture flaws, blind spots, and other issues that may lead to inadequate or unreliable data interpretations. Reductionism and dehumanization through EPM data interpretation are potential concerns that need to be considered (Indiparambil, 2019). As a result, having the appropriate professionals in place to train all users on how to use the tools responsibly and effectively is an important prerequisite for the introduction of EPM solutions. While many of these will be traditionally located in HR, they may be split across different functions in larger organizations that feature very different business units.

Functional /Team Managers

One of the challenges for many organizations is how to manage performance in very disparate and unique work structures and settings. The Covid-19 pandemic resulted in a rapid move to remote work that was often accompanied by the introduction of new tools to manage employees remotely – often without the guidance or prior knowledge on how to implement them in a motivating and effective manner (Aloisi & De Stefano). This lack of guidance also reflects a significant challenge for all HR practices that involve technology at work, as indicated by our second research question. A significant number of managers remarked upon employee resistance to remote monitoring which led in turn to an increase in conflicts between employees and management (e.g., Bathini & Kandathil, 2020; Wang *et al.*, 2021). This is unfortunate but not necessarily surprising, given that the rapid move to remote work and the use of new monitoring tools was often not accompanied by adequate managerial training on how to employ these tools. Many managers remained unaware of how the use of such tools – for example, to enforce pre-pandemic performance standards - could have negative impacts on their teams who were suddenly working from home, often together with their families and children (e.g., Aloisi & DeStefano, 2021; Mallett *et al.*, 2020). Some authors have therefore questioned the “unforgiving expectations” placed by employers on their employees (Mallett *et al.*, 2020). This highlights the importance of initial training managers but likewise points to the need to identify the appropriateness of performance standards (many of which were implemented prior to the adoption of the electronic tools). Thankfully, some scholars have since produced more updated guidance for managers working with remote workers (e.g., Lockwood & Nath, 2021).

There are important critical limitations to setting strict performance standards in many circumstances. While customer service and technical support functions often feature quantifiable data streams (such as ticket systems), the work of many other functions may not be as readily quantifiable. This creates issues when organizations introduce EPM, as the performance indicators will often vary greatly. Some key performance indicators may not always be captured by the application, requiring managers to find alternative channels to ensure they address these blind spots. This means that each team or function may benefit from a manager who can identify which metrics are appropriate for them and how often, and in what form, they will use EPM data in their appraisal, promotion, and training rounds.

Data Analysts

Previous research has shown that there is an increasing need for data analysts and HR professionals to collaborate and to understand how HR-related data can be used effectively for business purposes (Dahlbom *et al.*, 2020). Many HR professionals still lack the foundations, knowledge, and skills to support analytics projects. EPM tends to involve many functions that are already involved in running employee data analytics and enterprise resource systems, workforce/HR information systems, and other online portals (Bondarouk & Brewster, 2016). Indeed, many professionals tasked with HR analytics will work in other functions (van den Heuvel & Bondarouk, 2017), highlighting the increasingly cross-functional spread of expertise in organizations when it comes to HR-led practices (e.g., Wang *et al.*, 2018).

In terms of our second research question and thus the challenges and recommendations regarding HR practices involving technology of work, we would like to advance two recommendations. Firstly, to commit to assessing the return on investment of employing an EPM solution and to utilize EPM information as effectively as possible. In regard of the latter, it is advisable to regularly assess the

quality, quantity, reliability and generalizability of the information that such EPM solutions generate (using regular employee audits involving data analysts may likewise be helpful, see Lockwood & Nath, 2021). Data analysts can thus play an important role in helping generate insights that can be displayed on dashboards for managers and teams and create productivity analytics that could help the accounting functions to assess the financial benefits of such systems. While such data analysts may be located in HR (especially those tasked with employee controls and people analytics), in most organizations, such experts will actually be situated in other functions such as marketing, accounting, and operations (van den Heuvel & Bondarouk, 2017).

Health and Safety Professionals

Many organizations involve professionals to support how EPM is implemented in the hope of finding ways to recognize but also minimize negative effects on employee health and safety (e.g., violations of Working Time Directives in Europe). Important functional and professional groups here are mental and occupational health professionals, coaches, and company doctors. These professionals are often interested in using EPM data to support employee developments that can lead to more positive employee perceptions and the creation of timely health promotion initiatives as well (Al-Hitmi & Sherif, 2018). This can be helpful to reduce unintended negative effects on employee attitudes and performance.

During the Covid-19 pandemic, many managers grew increasingly concerned about employee health and well-being, concerns highlighted in recent literature (e.g., Jamal *et al.*, 2021). EPM, like many new digital ways of working, can generate performance gains but paradoxically exacerbate or create human performance and health problems (Kotera & Vionne, 2020). Examples include health concerns arising due to emotional exhaustion, stress, anxiety, and high levels of tension at work (Baer *et al.*, 2014; Indiparambil, 2017; Tavani, 2004). EPM alone has been linked to reduced motivation (Martin *et al.*, 2016), organizational commitment and citizenship behavior (Jeske & Santuzzi, 2015). The pandemic situation, combined with remote working, increased managerial use of EPM tools but also led to more concerns about employee acceptance and reactions to EPM (see Aloisi & De Stefano, 2021; Tomczak *et al.*, 2020). Many remote workers experienced mental stresses such as loneliness, isolation, and insomnia during the pandemic (Bartmann *et al.*, 2021; Jamal *et al.*, 2021).

Over the last two years, several researchers have called for greater recognition of the role of health and safety professionals in aiding HR to design and implement new employee-oriented support mechanisms, well-being initiatives or behavioral interventions (e.g., Arora & Suri, 2020; Bartmann *et al.*, 2021; Diab-Bahman & Al-Enzi, 2020; Sinclair *et al.*, 2020; Wang *et al.*, 2021). These are often implemented in response to remote workers' reports showing intensification, poorer work-life balance and longer working hours (e.g., Bartmann *et al.*, 2021; Bolisani *et al.*, 2020; Bulińska-Stangrecka *et al.*, 2021; DeFillipis *et al.*, 2020; Mallett *et al.*, 2020). While it is difficult to separate out the effects of remote work, the Covid-19 pandemic, working with family in the home and EPM, it is clear that health and safety professionals can be very helpful to managers when determining appropriate performance standards for individuals and teams (Welter & Ensslin, 2021; see also Jeske, 2022). For example, they are able to advise their organizations' managers on health-related, ergonomically oriented aspects of working conditions such as musculoskeletal and visual strain when working in front of computers, the risks of repetitive movements, the need for health breaks, and the effects of long-term sedentary work and long working hours on employee performance (for reference, Bartmann *et al.*, 2021; Jain *et al.*, 2021; Mojtahedzadeh *et al.*, 2021).

DISCUSSION

This paper has aimed to outline the connections between HR and other functions by outlining how EPM as a practice is often cross-functional in the systemic demands of its design and implementation. We suggest that these aforementioned aspects also transfer to many other HR-led but IT-enabled processes within electronic and digital HR systems. What is noteworthy in terms of EPM is that its use can be explored through different strategic HR lenses – analytics, horizontal/vertical fit, change management – as a reflection of different trends and cross-functional arrangements. HR as a function is continuously under pressure to adapt as organizational forms and work modes evolve (Choudhury *et al.*, 2020; Kotera & Viona, 2020).

Below we present some additional reflections on how the various themes outlined above are interconnected, as well as why discourse around cross-functionality is not a common area of discussion in HR literature and practice to date. This section builds on emerging work on the topic of HR cross-functionality (Jeske & Calvard, 2020a; Pellathy *et al.*, 2019; Ulrich & Dulebohn, 2015), by considering factors related to HR as a function, professional boundaries, and other constraints. In these sections, we additionally summarize our reflections in relation to our second research question: What are the challenges and recommendations that can be deduced from this example for general HR practice involving technology at work? We conclude the discussion with several practical recommendations in line with our second research question and further reading suggestions.

Reflections on Cross-Functionality, HR and EPM

In many ways, the HR function is uniquely suited to lead and co-design many people-centric, cross-functional pilot projects that could pave the way towards achieving more effective, sustainable cross-functional integration (Dahlbom *et al.*, 2020). HR staff act as important cross-functional conflict management mediators (Guttman, 2009), when they engage in problem solving between two or more functions that are experiencing people management issues (e.g., when staff are seconded to other functions, or on loan due to shortages across areas). This means that many HR professionals will, due to their use of systems and internal focus, often be more readily aware of how organizational functions are connected and the way in which processes across business units are integrated with one another (Rowe *et al.*, 2005). This awareness, if strategically employed to identify cross-functional practice, could be a critical asset to cross-functional collaboration, coordination, and communication efforts. Furthermore, as guardians of staff data and records, HR professionals are uniquely positioned to facilitate data-driven knowledge sharing collaborations between different functions (Rasmussen & Ulrich, 2015; Wang *et al.*, 2018). HR often has considerable information about how employees at all levels and functions are performing through knowledge of their attitudes, behaviors, and interactions.

Yet, many researchers and professionals have raised concerns in the last twenty years about the ability of HR professionals to develop and promote strategic HR initiatives and their ability and knowhow to use and interpret data which would enable them to recognize and predict trends and threats that stand in the way of such initiatives. The increasing emergence of cross-functionality in domains such as EPM further highlight the need to address skill gaps and think beyond the HR domains when new tools are rolled out. What is more, trends such as tool adoption and remote work highlight the need for HR professionals to continuously scan the organizational landscape, to be aware of existing or new organizational stakeholders that HR ought to cooperate and collaborate with in order to be effective (see Rowe *et al.*,

2005). The aforementioned issues explain, at least in part, as to why the term ‘cross-functionality’ is not firmly connected to practice and why this concept is not very frequently covered in the HR literature or in the professional discourse around EPM.

In the introduction of this chapter, we defined cross-functional integration, based on Pellathy *et al.*’s work (2019), as the process involving collaboration, coordination, and communication among different functions responsible for people management processes in order to maximize the outcomes for their organization and external partners. As we will show next, several challenges stand in the way of cross-functional integration for most HR functions to date. For example, one issue is the pronounced differentiation between some functions in organizations. Organizations often exhibit various forms and levels of differentiation, centralization and vary in terms of their cultural dynamics (Hughes, 2010). These designs can generate an environment where functions act as disconnected ‘silos’ (Tett, 2015). This can indeed include the HR function itself (Forsten-Astikainen *et al.*, 2017). In many cases, the HR function leads an isolated existence, separated from the rest of the organization and its stakeholders (Ulrich & Dulebohn, 2015). Task and reward interdependencies are often not identified, even when functions contribute and share responsibility for the outputs of their work (Szalavetz, 2018). These circumstances will be detrimental to cross-functional practices and integration efforts. However, the increasing use of EPM tools increasingly requires a cross-functional approach – one where barriers to collaboration, coordination, and communication are overcome.

Another prominent barrier concerns issues around professional boundaries of different functions and jurisdictions, identities, role clarity and perceived importance (e.g., Wylie *et al.*, 2014). This is not just an issue between functions per se but also within HR itself, where not all practitioners may hold professional memberships or have specific affiliations (Wright, 2008). The literature on cross-functionality, though not specifically on HR, furthermore notes inefficiency, conflict, and communication challenges due to the very different specializations and terminologies used in different functions (Barke & Prechelt, 2018; Belasen & Rufer, 2014; Majchrzak *et al.*, 2012). It is therefore worth noting that cross-functional teamwork may not always be as effective or necessary, as cross-functionality goes hand in hand with both advantages and disadvantages (e.g., need for onboarding, speed of decision-making, need for complementarity and alignment on goals).

This is further complicated by the pace, frequency, and levels of technological and structural change many organizations are experiencing. Like other functions, HR is under pressure to keep pace with technological changes to training and information systems, and the competency expectations placed on HR managers are increasing (Angrave *et al.*, 2016; Poba-Nzaou *et al.*, 2020; Stone *et al.*, 2015). The ongoing globalization of work and the internationalization of employee and customer processes further add to the workload and technological stress experienced and increase the number of stakeholders associated with functions such as HR (Boselie *et al.*, 2009; Delbridge *et al.*, 2011; Florkowski, 2019). As demonstrated here, this is certainly the case with regard to EPM practices.

At the same time, experimenting with and recognizing projects of a cross-functional nature will also create new opportunities to address these barriers. For example, by recognizing the value of and striving for more cross-functional integration, the HR function can alleviate some of the tensions and demands on its staff, which should increase awareness about and respect for the various interdependencies that exist between functions in organizations when it comes to HR-related and IT-enabled practices. These steps could improve forward-thinking, cross-functional initiatives. For example, purchases of EPM-related software and applications—of Enterprise Information Systems or similar – can be conceptualized as major cross-functional investment decisions (van den Heuvel & Bondarouk, 2017). In highlighting the

cross-functional nature of these purchases, organizations will find it easier to identify necessary training requirements ensuring that all the functions involved will have the staffing, technical and analytical capabilities to manage EPM processes, both within their HR and related functions. In sum, such awareness of cross-functional dimensions and interdependencies will increase the subsequent coordination, collaboration and communication that is required to support and utilize such EPM applications effectively across different functions.

Practical and Policy Recommendations

So, in line with our second research question, what potential recommendations can be offered for general HR practice involving technology at work? Several recommendations can be formulated for HR in instances where the organization creates its own internal solutions, applications, and products to manage performance electronically. Many of the challenges noted above can be directly addressed by organizations through providing their functions with the appropriate budgets and suitable resources for cross-functional training, collaborative work and managerial workshops to overcome professional and functional barriers to integration. Such efforts should include analytical skills focus to enable all users of EPM software to interpret and apply the generated information appropriately given the relevant performance context.

In addition, other interventions may be needed. These include the development of technological infrastructures that are fit for purpose and compatible for all functions involved. Appropriate auditing functions and quality assurance processes may need to be introduced so that all functions obtain information that enables them to assess how effectively they are fulfilling their responsibilities when it comes to EPM (Bhave *et al.*, 2020). This includes finding mechanisms for employee voice, accountability and privacy (Aloisi & De Stefano, 2021; Vatcha, 2020). Indeed, further research would suggest that empowered employees are not severely impacted by the negative effects of monitoring and thus report fewer negative attitudes and behaviors towards it (Martin *et al.*, 2016). Similarly, such consideration may likewise need to be extended to performance management that is less formal (see Lee *et al.*, 2020).

A further concern should be to identify suitable mechanisms to assess data security, quality and identify potential discriminatory effects in how EPM information is used (e.g., by only collecting full-time staff data, this potentially sidelines part-time staff from promotions and incentives). Other long-term and strategic options include, for example, the broadening of existing career paths to include careers, not just in one, but in multiple functions (Levenson, 2012). All these practices are avenues that will further support the development of more effective cross-functional practices such as EPM in the future.

Furthermore, by embracing co-creation in organizational design processes, employee concerns and managerial use cases can be incorporated. All relevant functions should be involved in the design of devices and applications with monitoring functions. As explored above, this includes HR but also its collaborative partners in other functions such as Legal Affairs and IT as they all have a stake in terms of what kind of information is collected, where this information is stored, and under which circumstances that information should be shared. All these aspects are linked to risk management, data governance, and different legislative frameworks guiding data transfer (Jeske & Calvard, 2020b). These practice areas are of particular concern where they involve the use of third-party EPM software sourced from international vendors.

In the long run, it seems likely that the need to adopt cross-functional, and essentially cross-disciplinary, practices will continue to increase. More and more articles suggest that awareness of such practices is rising, as is the inherent urgency to address them in the HR domain more specifically (e.g., Kulik, 2021;

Lockwood & Nath, 2021). Indeed, the recent rise in the number of articles on EPM and remote work are testament to this trend (Aloisi & De Stefano, 2021; Bathini & Kandathil, 2020; Jeske, 2021, 2022; Vatcha, 2020; Wang *et al.*, 2021).

Another relevant contribution comes from a recent study by McDermott *et al.* (2019), which offers some HR guidance on setting up formative cross-functional performance management systems. In addition, two general blueprints for cross-functional design and organizational change exist that may be helpful in practice. First, the concept advanced in Ulrich and Dulebohn (2015) of HR as a ‘professional services organization’ that is more widely spread and embedded across the business environment. Second, readers may be interested in Marques’ (2006) framework of a new HR department, structured as a cross-functional unit that explicitly works with a spanned formation of cross-departmental representatives. Finally, readers may wish to review recent work on HR and data analytics (e.g., Meijerink *et al.*, 2021; Tursunbayeva *et al.*, 2021).

CONCLUSION

The current paper outlines how cross-functionality is exhibited in EPM as an HR-led and IT-enabled practice. We hope this paper will therefore increase both the awareness and knowledge of HR professionals regarding the importance of cross-functionality. As noted, up until now, cross-functionality is not a concept that is regularly and explicitly explored in the domain of HR. We have already explored barriers and opportunities in relation to cross-functionality and EPM as an HR practice in the previous sections. Nevertheless, some general challenges and recommendations on the topic of cross-functionality and HR are worth noting. For example, a key challenge to cross-functionality in HR practice is the result of the prevailing skill gaps that many employers report (e.g. lack of analytical skills and cross-functional expertise among HR professionals). Another key challenge arises due to the rapid adoption of HR tools by professionals both inside and outside the HR domain. As we noted during the Covid-19 pandemic in 2020 to 2022, the rapid pace of organizational change has also challenged the ability and capacity of HR practitioners to align existing HR practices (e.g., in terms of remote working, work design, health and safety, reward and performance management). All these developments highlight the important need for HR to become more cross-functional in order to keep pace with developments and new demands on the profession and function.

Several recommendations may, however, set the stage right for more effective cross-functional efforts within organizations specifically with regard to the HR function. As proposed in this chapter, a first step could be to properly explore all the professionals and stakeholders in an organization that ought to be more closely consulted in relation to HR initiatives. Involving them early and in a timely fashion is more likely to create more synergy and good will to align the strategies of various functions in a way that makes them mutually supportive and complimentary, rather than contradictory and disconnected from one another. Such exchanges and collaboration, together with continuous conversations about mutual expectations, project needs, and timelines could similarly help to identify the means by which organizations could address or overcome skill gaps (e.g., by seconding experts to HR for specific projects and pairing HR professionals with ‘buddies’ from other professions). Closer cooperation and alignment of priorities could likewise help to address various (legal, ethical, or inter-departmental) implementation challenges that arise in relation to modern HR initiatives.

In conclusion, we propose that building on cross-functional insights will enable the profession to recognize and better respond to structural and technological changes at work (Ashkenas *et al.*, 2015; Ulrich *et al.*, 2009). The current work on EPM can therefore serve as an example of cross-functionality involving HR as a key function, address an important knowledge gap and hopefully represent a contribution to greater identification of cross-functional practices involving HR and future opportunities for cross-functional integration.

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KEY TERMS AND DEFINITIONS

Cross-Functional Integration: This is a process involving collaboration, coordination, and communication among different functions responsible for people management processes in order to maximize the outcomes for their organization and external partners.

Cyber-Resilience: Refers to the ability of an organization to withstand cyber events and continue to deliver its services or maintain its productivity.

Electronic Performance Monitoring: This is the use of various technological tools and options to monitor, record and subsequently analyze employee's behaviors that are often directly as well as indirectly associated with their performance - as individuals, team members, or organizational members overall.

Cross-Functionality in Practice

Psychological Contract: These often incorporate the implicit perceptions and expectations of employees regarding what they will be offered by their employers (tangible and intangible benefits, working conditions, remuneration) and have access to (e.g., in terms of autonomy, resources, support, privacy).

Chapter 20

Contextual Transformations: Organisational Sustainability Under Crisis

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ABSTRACT

This study analyzes the various features and elements related to strategic organizational sustainability. The analysis departs from the assumption that traditional organizations have to face a lot of challenges posed by the new global economy context confronting contradictory patterns of globalization and des-globalization processes. In order to create the new conditions for the organizations not only to survive but to succeed, a new model based on designing and implementing strategic organizational sustainability, abandoning the narrow focus on economic growth and profits to embrace the social inclusion and equity as well as the environmental sustainability issues, is.

INTRODUCTION

Organizational sustainability is undergoing a crisis as contemporary society is going through rapid dynamic changes in the new global economy. Organizations are facing new opportunities and threats as they work toward sustainable organizational development at their own pace and speed. Besides organizational policies and beyond what is written in employee job descriptions, workers have diverse backgrounds and personal histories. This creates a more comprehensive work environment and organizations that are embedded within complex economies and societies. The global economy has penetrated and changed organizations whose work processes and practices are lagging those of organizational structures. This problem requires immediate organizational solutions. On a global scale, there have been many economic

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Contextual Transformations

and technological changes under which organizations must develop and adapt to specific environmental conditions.

Sustainability is increasingly relevant when it comes the contextualization and transformation of organizations in the face of a global crisis. Today, organizations and consumers are concerned with ecological and social issues and are becoming more aware of their responsibility to develop strategic and sustainable organizations and to maintain environmental management. Organizations may have different approaches to achieve these goals because of their varying capabilities, resources, knowledge, expertise, etc.

Organizations engage in operational relationships and interactions between individuals, group organizations and institutions and make decisions that are channeled for sustainable organizational and personal development. Organizational changes in cultural, structural, and individual behaviors have had a significant impact on community development. The organizational structure states the responsibilities of all workers and manages communication to facilitate the exchange of knowledge, organizational changes and progress, cooperation, and collective bargaining. It also ensures the implementation of employment policies, the agreement for procedures, and the settlement of disputes and grievances. Traditional organizational structures are struggling with new internal, external, and environmental demands.

Organizational sustainability is affected by global and local sustainability challenges and issues that need to be assessed and analyzed for designing policies, strategies and practices that may have broader economic, social, and environmental impact.

The study begins with the analysis of sustainability and organizations. It aims to create a link between both elements in the conceptualization of organizational sustainability and its components: economic growth and efficiency, social justice, equity and inclusion, and environmental sustainability. Finally, this study relates all these components and analyses elements from strategic organizational development before elaborating the final conclusions.

LITERATURE REVIEW

Around the world, more organizations are taking responsibility for sustainability and environmental management (Rondinelli and Berry, 2000). Sustainability has become a relevant issue because today's consumers are more concerned about ecological and social issues when consuming and using products and services.

Originally, sustainability was defined as the element that meets the needs of the present without compromising the ability of future generations to meet their own needs (Commission on Environment and Development 1987; Brundtland Report to the United Nations, 1987). Sustainability is critical for the organizations that are concerned with meeting the current needs of society without compromising the ability to meet the needs of future generations.

Sustainability is an ecological concept and environmental development that focuses on environmental stewardship, economic growth, and social justice, all of which are essential factors when characterizing sustainable organizational development. Sustainable organizational development is a concept that leads to the promotion of growth and development (Sev, 2009). The framework that leads to environmental sustainability (Hill and Bowen, 1997) revolves around the management of organizational development and life cycle synergies and involves workers in long-term development and decision-making processes. Environmental sustainability is feasible with the development of the internal competencies. The ability

of organizations to create and manage sustainable core competencies allow them to implement interventions and initiatives on biophysical, economic, social, environmental, and technical sustainability (Hill and Bowen, 1997).

Individuals are interrelated in a system of organizations that are in turn, connected within units and workplaces with varying characteristics. Thus, they are constantly interested in finding the best methods to organize them (Scott, 1992). As Senge (1990) stated to create and develop a sustainable organizational solution, it is required to invest in resources and skills that create a systemic thinking pattern on all organizational levels (Senge, 1990).

Individuals are beginning to join the organizations that meet their needs and demands such as the development of human relations. By rewarding the work and contributions to the production of goods and services with the best working conditions, these organizations also generate a feeling of satisfaction within their community (Androniceanu, 2009). Individuals working in organizations are encouraged to develop relationships and connections in the workplace and to share their ideas more freely and democratically, regardless of their position (Dombrowski, *et al.*, 2007).

It is essential to cultivate trust within organizations when it comes to managing information and operational communication between individuals. This will be reflected in higher levels of motivation and a better sense of commitment, which in turn will reduce instability in the outcomes of the organization (Elving, 2005; Mahal, 2009). Although it has been taken for granted that organizations operate under stable and predictable conditions, we now know that it is not the case. Organizations constantly find themselves in complex, uncertain, ambiguous, and discontinued environments. (Nonaka and Takeuchi, 1995; Weick, 1995; March 2006).

The organizations give individuals and other organizations the opportunity to develop creative management skills and use the resources of power structures and distribution of authority, thus enabling the purposes and goals of the organization (Kanter, 2008; Leana, 1987).

Sustainable organizations are created by groups of individuals working together (Postmes, 2003). Organizations can be analyzed with the core competence of in-out and out-in analysis (Han *et al.* 2010), which brings importance to the usage of knowledge and identifies the courses of action taken to diversify strategies, to develop the workforce and to enable new organizational positions and sustainable growth.

Interaction among organizational stakeholders increases the potential of networked structures to achieve sustainable organizational development initiatives (Flyvbjerg, *et al.*, 2003). Organizational networking that includes collaboration among academic and research institutions, government agencies and business make up the triple helix (Etzkowitz and Leydesdorff, 2000). A sustainable work system is one that meets the needs of the wellbeing of all the stakeholders involved and develops their creative potential in continuous individual and organizational development.

Through continuous improvement of organizational processes, appropriate working climates can be created, and sustainable growth and development can be implemented to respond to environmental challenges. The development of low-carbon products was possible thanks to environmental training focused on climate change mitigation (Saturnino Neto, *et al.*, 2014). Organizational development requires specialized training (Perron *et al.* 2006) to achieve higher performance levels within environmental management systems (Sarkis, *et al.*, 2010).

Organizations must develop leadership strategies centered on sustainability practices, pervading every functional area within the organization, and submitting it to sustainable development systems and processes. Finally, this process requires a greater involvement and commitment from all the stakeholders. Macke and Genari (2019) analyses state-of-the-art elements drawn from sustainable leadership, human

Contextual Transformations

resources management and environmental sustainability embedded in principles, organizational values, processes, and practices.

Green organizations have the social and corporate responsibility to create value for the common good and should be measured in terms of their impact on economic growth, environmental sustainability, and social development, thus benefitting the various stakeholders involved (Freeman, 1984).

To overcome the many challenges that arise from environmental changes, organizations must focus on their development (Han *et al.*, 2010). Organizational management plays a critical role in promoting innovative sustainability by creating adequate behaviors, values and attitudes engaged toward the organization's visions. Organizations set out long-term strategic plans that aim to achieve specific goals, increase quality and profitability, and reduce risks, costs, and time (Garrison and Matos, 2016).

Organizations are implementing management systems based upon international principles and standards, organization strategies and objectives, business processes and optimization as well as resource management, all of which are implemented in a systematic and structured way. Continual and sustainable organizational development requires internal structures and systems (Hill and Bowen, 1997). Organizational structures, norms, rules, regulations, communication processes and values are based upon an organizational bureaucratic model. Organizational structure is defined as the relationship between the authorities and the tasks that must be completed in an organization. It directly affects its sustainable development and use of resources through the coordination of its employees who are working together to achieve the organization's goals (Martin, 2014).

Sustainable organizational development needs and internal structure to provide motivation and opportunities, to harness positive behavior and to help balance power dynamics (Kanter, 2008). The organizational structure is a hierarchical arrangement of communications and authorities formulated around the organization's objectives and strategies. Coordination of activities is an essential factor amongst the organization's set of skills, as it facilitates communication and develops social identity within the organization (Postmes, 2003).

Organization and communication are dependent of one another in corporate or organizational environments as they aid in developing advantages, competitiveness and can help an organization find and maintain proficient, motivated, and talented employees (Balmer and Gray, 1999). The communication channels of the organization must focus on empowering the workers to improve the level of development, motivation, and commitment of its individuals and to enable sustainable organizational growth.

Organizational communication develops the structure and processes that are necessary for sustainable growth. Organizational communication is a tool that helps raise awareness within the stakeholders and conveys the concept of organizational proudness, purpose, goal and most importantly, of community ties. Organizational communication is the foundation of all interactions among individuals. It sets the group's norms and social identity, promotes social cohesion, improves communication, collaboration, and individual commitment (Elving, 2005; Haslam, 1997; Postmes 2003; Tucker, *et al.* 1996).

Organizational communication also helps employees develop their sense of commitment, motivation, and involvement, as well as their overall quality of life (Elving, 2005; Mahal, 2009). Organizational communication enables interpersonal relationships between all agents and stakeholders who play a role in attaining of the strategic goals of the organization (Postmes, 2003). Organizational communication creates, expands, and continuously transfers knowledge within a workforce. It promotes the feeling of community within individuals that are active in their communities and contributes to the overall well-being of local and regional communities.

The organizational models of Barley and Tolbert (1997) and Crossan *et al.* (1999) contradict each other. On one hand, there is the organizational setting, and on the other, there is the work put in place to promote societal changes and develop current processes, challenge the institutions and organizations, and adopt post-bureaucratic designs. Various models for organizations across different contexts tend to duplicate organizational structures and processes. Although these models are sometimes presented as autonomous, the analysis suggests that they have similar norms and decision-making processes and engage in the well-known method of organizational isomorphism (Meyer and Rowan, 1977)

The post-bureaucratic characteristics and problems of work systems can be linked to traditional bureaucratic workplaces and occupations that are subject to internal and external factors. Some elements of organizational post-bureaucratic structures can co-exist beyond its formal structures and within the bureaucratic environment, making it more stable. The nature of organizational work is changing rapidly and drastically with the transitional emergence of post-bureaucratic systems. This poses new challenges to traditional organizational structures, although certain elements of post-bureaucratic organizations may still be found in more traditional bureaucratic frameworks (Howard, 1995).

Human resources motivation and job satisfaction are relevant behavioral factors that support sustainable organizational development and maintain the priorities of long-term management (Deal *et al.*, 1994; Erez *et al.*, 1993). Human resources motivation, job satisfaction and wage policies are critical factors for economic and social activities (Ciocoiu, 2011; Colesca, 2010; Sims and Veres, 2007), supporting sustainable organizational development (Deal and Jurkins, 1994; Erez and Early, 1993). Workers hope that the wage policy of the organization can meet their personal needs as they demand a salary, duties, functions, benefits, and cash rewards (Tyson, 2006) in exchange of work performance and contribution to production.

The development of human relations at work is a result of existing work conditions and welfare state benefits (Androniceanu, 2009). Organizational motivation is possible when the organizational climate maintains open communication and improves performance among the members involved (Patterson, West, Shackleton, Dawson, Lawthom, Maitlis and Wallace, 2005). Organizational communication plays a key role in the attainment of the workforce's commitment (Elving, 2005) to develop a sustainable and competitive advantage within the organization's strategic core competencies (Tucker, *et al.*, 1996). Organizational communication allows members to interact and participate in solving problems and making decisions. It also gives them the tools to feel empowered and to innovate.

Empowerment has a significant positive impact on organizational sustainable development (Mumford *et al.*, 2017) as it can help motivate employees to make informed decisions and act upon them. It also has an impact on organizational and sustainable development, all while creating citizenship behavior by giving moral, ethical, psychological, social, and financial support (Bandura, 2002). Trust and accuracy of information lead to better organizational decisions across the hierarchical structure and have a significant impact on the overall performance (Roberts and O'Reilly, 1974). Many decision-making issues and details that exist in management groups vanish by the time they make their way to the top of the organization's management pyramid. This is only one of the deteriorated symptoms of bureaucracy (Heckscher, 1994). Top management is responsible of making the organizational work system more comprehensible and manageable at every level of the organization.

As stated by Ann Brands (2021), "Pride is the most important human emotion for motivating social behavior. Organizational pride contributes to a good and respectful collaboration with other respected colleagues, and in the end organizational pride contributes to a better team performance."

Contextual Transformations

The quality of information transmitted between individuals hinges on their level of trust, organizational behavior, and satisfaction (Roberts and O'Reilly, 1974). Trust development among individuals emerges from interpersonal relationships and interactions through communication, both of which are linked to the organizational behavior and structure that creates a cohesive work environment and enables organizations to facilitate the transfer of information (Roberts and O'Reilly, 1974).

The organizational structure correlates with its behavior, motivation, communication, and its overall cohesion through the organizational climate. Organizational climate refers to the representation of events that affect the level of motivation and performance on both individual and organizational levels (Patterson *et al*, 2005; James, Choi, Ko, McNeil, Minton, Wright, and Kim, 2008).

Organizational climate is the symbol of organizational ambitions and refers to the collective opinions on regulations, processes, protocols, and methods applied to attain objectives (Elving, 2005). Organizational climate allows all the stakeholders and actors to reach a consensus regarding the methods that are used to achieve the goals of the organization. Actions that are consistent with these goals and objectives have the power to improve relationships and lead to an overall higher level of performance (James *et al.*, 2008). The organizational climate has many effects within the organization and has a high impact on the workforce.

The organizational climate enhances positive motivation, balances the structure of power, and improves overall performance (Patterson *et al.*, 2005). It must be adjusted to and satisfy the needs of all stakeholders; it leads to consistent and continual sustainable organizational development (Cummings and Worley, 2014). Organizational behavior refers to the proportionate structure and alignment of individuals vis-à-vis their organization in different situations. It is used as a tool to determine various social types. These differences in proportions are caused by individual attitude and by the specific needs of the organization (Kanter, 2008). Although environmental management systems as independent variables present many challenges, they offer opportunities mediated by the combination of empirical-environmental training, employee involvement and the organization's environmental performance (Daily *et al.*, 2011).

The organization's performance is measured in terms of the balance it maintains between economic, social, and environmental outcomes. These outcomes show the organization's ability to attain organizational growth and to protect, conserve and maintain the natural resources for our future generations (Daily and Huang, 2001; Jennings and Zandbergen, 1995; Ramus, 2002).

RESEARCH METHODS: HOLISTIC, HUMANISTIC AND CRITICAL ANALYSIS

Holistic, humanistic, and critical analysis are the basic conditions for a correct interpretation of the argumentation presented in any organizational research. The methodology of critical analysis instrumented in this organizational development research is based on various levels of analysis of texts that report theoretical and empirical research on the subject in question. The first level of this critical analysis is constituted by the perceived discrimination in the topic of this research, where segments of the theoretical and empirical research reports are selected and the arguments that support the topic are presented in such a way that the established analytical categories proposed are incorporated into the analysis.

The gathering and selection of information segments is contextualized as an indicator and is assigned to the corresponding category, making it possible to find similarities and disparities that lead to discrimination and surveying of the topics followed by the recorded analysis.

On the second level of critical analysis, the argumentation of the different authors is reviewed to identify where the sequence begins and where it ends. Then, it is circumscribed in the context and environment in which the authors develop their arguments. The argumentative sequences are recorded in a way that allows inferring and reconstructing the argumentative structure. The argumentation of the academic work is built based on the argumentative analysis of the authors, identifying the possible reasons that determine the strength of the argument.

At a more advanced level, the argumentation strategies developed by the authors are analyzed to develop a meta-argumentative level that serves as the basis for the preparation of the research report. These strategies provide greater legitimation of the facts, judgments and arguments that are intended to develop awareness of the implications of the topics discussed. This argumentative critical analysis scheme serves as the basis for the preparation of the final research report, emphasizing the findings produced by the analysis to be specified in the discussion, the implications, and the conclusions.

In this critical analysis, a reflection within the findings of the research is established as well as its relation to the works analyzed from the theoretical, conceptual, and methodological perspectives. The convergences and differences are carefully observed, considering the type of research conducted, and the context in which it was completed. After the findings are finalized, major criticism, potential improvements and academic concerns are established.

PRESENTATION AND ANALYSIS OF FINDINGS

A holistic approach to organizational sustainability enhances reputation, reduces costs, and places organizations in a leading position. Holistic green organizations should use recycled and re-used materials for the design of new green products and packaging. Naudé (2012) has proposed a tridimensional approach to sustainable development that combines economic, social, and environmental dimensions with initiatives and strategies. Organizational sustainable development has an economic, social, and environmental advantage that can be managed by strategies focused on socio-economic development and environmental protection and maintenance.

Sustainability is an organization's ability to achieve its goals, thus improving long term shareholder value by integrating economic, environmental, and social opportunities into its organizational sustainable strategies (Symposium on Sustainability, 2001). The organizational sustainability framework (Hill and Bowen, 1997) analyses the biophysical, economic, technical, and social elements of sustainability.

Sustainable development in organizations is guided by the following principles: active ownership, cooperation among actors and learning through ongoing evaluation. The principles of organizational sustainability provide the foundations for the managerial strategies and policies aimed to attain sustainable organizational growth and development (Sev, 2009). A sustainability organizational agenda designs and implements sustainability strategy and operational planning on all levels to manage the initiatives, practices and activities led by top management with the strategic support of professionals who oversee facilitation and agency. Sustainability strategic imperatives are present in most of the organizational agendas (Pucik, 2005).

Corporate and organizational communication refers to the organizational reputation and identity developed by the stakeholders (Balmer and Gray, 1999). The development of organizational leadership and corporate communication requires investments to reap the benefits it can offer (Balmer and Gray, 1999). The quality of information transmitted between individuals hinges on their level of trust, orga-

Contextual Transformations

nizational behavior, and satisfaction (Roberts and O'Reilly, 1974). Trust among individuals emerges from interpersonal relationships, interactions, and communication, which are linked to organizational behavior and structures that create a cohesive work environment, enabling organizations to facilitate the transfer of information (Roberts and O'Reilly, 1974).

Organizational sustainability is the result of a congruent ideology of economic, societal, and ecological concerns that influence human resources management. Organizational growth is the natural expansion of an organization. Development on the other hand, is the ability to seize new opportunities when they present themselves (Daly 1996). Sustainable regenerative work systems are built upon individual and organizational sustainable organizations (Docherty *et al.*, 2002) and are contextualized within economic growth, social equity and justice, and environmental sustainability.

Organizational ethics has a direct link with environment sustainability, economic growth, and social justice in sustainable organizational development practices. The relationship between organizational ethics and sustainable development in terms of the organizational economic and social goals is the equitability (equity?) that ensures a balance between pricing, quality, and health factors of the products. The ethical principles are applied to analyses the economic growth, social inclusion and equity, environmental sustainability, technological innovation, policies and regulation and branding of organizations. All these factors are crucial as they influence the organization's ability to grow and become more self-sufficient; they must be considered when identifying the organization's strategic focus.

As for corporate ethics, and according to Lăzăroiu (2020) corporate ethics triggers the deployment of sustainable business practices in organizations.

Organizational performance management, which is supported by organizational ethics and governance fosters sustainable organizational development. This concept is defined as the radical changes made by an organization to become more self-sufficient in every one of its economic, social, and environmental functions. In other words, sustainable organizational development must be efficient, equitable and green. Sustainable organizational development is concerned with environmental issues and engages with the so-called "triple bottom line" measures that direct their energy toward natural resources, social impact, organization welfare, health and safety and protection of human rights, etc. The economic wellbeing and labor productivity depend on proper training, efficiency, and growth. Organizations act sustainably when they simultaneously support all the dimensions of the triple bottom line (TBL)—ecological, social, and economic (Braccini, 2018)

The core competencies of organizations are the foundations for sustainable growth and development such as the capabilities to create intangible resources like knowledge and innovation (Egbu, 2004; Spence and Mulligan, 1995), both of which focus on benefitting the economy and encompassing environmental sustainability (Vanegas *et al.*, 1996; Ortiz *et al.*, 2009 and Presley and Meade, 2010). Human motivation considers the effective organizational wages policies within the organization's own policy to stimulate sustainable economic efficiency (Ciocoiu, 2011; Sims *et al.*, 2007).

Organizational development is a regulated, integrated, and planned approach designed to cope with challenges and difficulties and boost an organization's efficiency. Organizational development is a response to environmental changes. Its carefully planned and tries to encourage organizations to revolutionize their values, attitudes, and beliefs, etc., to improve their overall efficiency and wellbeing (Bennis, 1994). The prevalent attitudes within the organization are linked to motivation and output (Mahal, 2009). The efficiency management principles are based upon the equilibrium between flexibility and labor time (full devotion and attention towards the organization's activities).

Organizational development indexes are used to diagnose and identify problems, steer the interventions, and plan the actions towards improving the organization's development. This is achieved through the implementation of corrective measures by units and groups that focus on organizational efficiency and health. The worker can perform more efficiently and cohesively when working in a stable workplace environment that allows them to maintain the standards and codes of conduct of the organization. Working in teams can also help the worker maintain initiative and show better overall performance (Mahal 2009).

The institutional environmental development of any economic system has an impact on its economic growth, social justice, and environmental sustainability. The organizational management and property structure, distribution of income, etc. can increase the level of institutional development, and the economic growth also increases (IMF, 2017, World Economic Outlook Database). High institutional quality is related to the negentropic processes in economic systems of developed economies while low institutional quality creates entropic processes in less developed economies where the environment is dissipative in economic growth and human capital (The Human Development Report, 2011).

The dissipative system follows a certain order within the organization. It is determined by the order of the economic system and characterized as an open non-equilibrium system that maximizes the organization's efficiency with a minimum of entropy and energy dissipation. The organizational entropy is measured by its orderliness and is based on the system's structure and its impact on the economic system in terms of syncretic and entropic synergies, (Prigozhin and Stengers, 1986).

Organizational development has an impact on the qualitative economic growth in national and global economic systems. Regional economic growth, competition and technological innovation networks are some external factors that can be standardized for organizational growth and development (Miyatake, 1996 and Tan, Shen, and Yao, 2011).

Social sustainability in organizations refers to sustainable human resources management practices that have an impact on the wellbeing of workers (Pfeffer, 2010). Social sustainability as a system may have institutionalized factors that provide some inertia to change. Organizational social systems are in a process of continuous change, in which people can be more aware of their environment and participate in the process of growth and development of their organization's journey to sustainability. (French and Bell, 1973).

Organizational power is shown in the hierarchical domination, where individuals have the necessary skills to structure resources and get their desired results (Kanter, 2008). When a select group of individuals has total monopoly of power, they tend to make decisions about the methods put forth to manage resources. This leads to inevitable conflict within the organization; it should be managed and minimized to ensure organizational harmony. Measurement of human development considers physical, psychological, and social variables such as quality of life, living standards as well as health and education levels.

Organizational sustainability is a critical concern in designing and implementing strategies and practices and leveraging management vision and leadership activities for organizational sustainable development. Organizational sustainability is a competitive strategy that enhances the ability to develop sustainable change (Moore and Manring, 2009). Organizations adopt different approaches and initiatives for achieving environmental sustainability and protecting the environmental growth. In doing so, it helps avoid disruptions by managing internal factors such as the causal role of human behavior (Davis and Challenger, 2013; Ones and Dilchert, 2012; Oskamp, 1995, 2000). Finally, organizational sustainability undertakes other environmental development initiatives outside the boundaries of the organization (Uzzell and Moser, 2009).

Contextual Transformations

Organizational development planning and interventions for change in practices, processes, procedures, and actions regarding environmental and contextual factors to design, formulate and execute organizational structures, strategies and policies are put in place to help organizations achieve their goals (Cummings and Worley, 2014). Transformational leadership and organizational learning capability are important indicators of the internal conditions that firms require to innovate. The readiness of a CEO to recognize risks and failures is certainly also one of the first steps of the innovation (Begum, 2020.)

The planning and control approach for sustainable organizational development projects and programs can be supplemented with an open process and by learning to promote long term sustainability (Lindkvist and Söderlund, 2002; Morris *et al.*, 2011; Brulin and Svensson, 2012; Svensson and Brulin, 2013). Strategic organizational planning for the formulation and implementation of long-term sustainability strategies to guide all stakeholders through theory involvement in sustainable development initiatives and practices across all levels of the organization to reap the best benefits.

Sustainable organization is the catalyst of sustainable human resources management strategy (Fairfield, Harmon, and Behson, 2011). Environmental and internal analysis of the organization is needed to link environmental management and human resources management and to formulate sustainable strategies that contribute to greater environmental sustainability of the organization.

Change facilitation and agency must take into consideration the development of structures and systems to support sustainability initiatives according to the organization's agenda. It must also align with the organizational culture and environmental strategy development. Organizational strategies should be aligned with the human resource system to link workforce capabilities with environmental sustainability growth management systems and sustainable development (Ichniowski *et al.*, 1997; Mendelson and Pillai, 1999; Collins and Clark, 2003, Boselie *et al.*, 2001; Paauwe and Boselie, 2003; Jiang *et al.*, 2012; Daily and Huang, 2001; Renwick *et al.*, 2013).

Organizational leaders must recognize that the human resource's function oversees implementing sustainable strategy (Harmon, *et al.*, 2010). Organizational sustainability strategies must meet the short-term needs and obligations all while sustaining long-term profit and economic growth, social justice and inclusion and environmental sustainability.

CONCLUSIONS AND RECOMMENDATIONS

The impact of economic globalization on sustainable organizations has shortened the cycles of change to keep the pace of environmental sustainability through the design and implementation of more holistic organizational business models. Furthermore, strategic management systems and policies are implemented to improve the use of organizational and technological knowledge, processes, and practices. However, while organizational change may not always be in action to solve organizational crisis at the level of the economic structure, organizational work activities and practices are constantly evolving and developing a closer relationship with the qualitative growth and efficiency of the economic system and the global economy.

The development of a sustainable organizational vision and mission to solve the crisis is facilitated by the incorporation of a sustainable agenda within the core values of the organization. Shaping the organizational sustainability in alignment with the vision and values of the organization requires the assessment of the stakeholder's impact on local communities and the consideration of issues around cultural diversity, intercultural dialogue, and organizational climate to improve the overall performance.

Sustainable organizational development implements innovation knowledge and processes in human resource management and development practices and aims to develop infrastructure and increase knowledge and innovation.

As stated by Ewing, (2018) Technology will continue to transform internal communication and employee engagement practices, including the evolvement toward being more social, personal, participative, mobile, and behavior-driven.

The individual and organizational adaptability to environmental change relies on their ability to develop organizational leadership and managerial effectiveness through adaptive processes in continuous developing stages. They must gather information, diagnose, and design interventions and implement new practices. Organizational leadership must be aligned with sustainable initiatives, lead the example for other organizations and maintain close contact with external environmental communities. They should also volunteer with non-profit organizations and offer organizational and supervisory support. Organizational management is responsible for the motivation and communication between the individuals of the organization and establishes what is expected from them within their workforce; how they can improve the functions of the organization and encompass their community.

Communication is the intrinsic organizational competency that can retain the workforce and as stated by Ghislandi, (2019) in the HDI, the level of human development is conceptualized as having three components: health, education, and economic conditions.

Organizational sustainable development supports regenerative and collaborative working processes to develop embedded organizational roles, practices, and tasks within organizations. Creating collaborative and regenerative work allows for individual and organizational development to be incorporated in post-bureaucratic working practices and contribute to organizational structures, behaviors, and technological processes, over an extended period.

To develop and transform organizational strategies, sustainable organizational practices must consider the needs of current economic, social, and environmental needs as well as those of all future stakeholders involved in sustainable activities.

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KEY TERMS AND DEFINITIONS

Economic Growth: It is understood as the positive evolution of the living standards of a territory, usually countries, measured in terms of the productive capacity of its economy and its income within a specific period.

Organization: An organization is a system designed to achieve certain goals and objectives.

Organizational Sustainability: Is the link that unites the physical environment to economic activities and policies, which could occur through the proper performance of companies.

Social Inclusion: Is the tendency to allow people at risk of poverty or social exclusion to have the opportunity to participate fully in social life, and thus enjoy an adequate standard of living.

Strategy: It is the direction or orientation that is given to the internal resources of an organization depending on the demands of its environment and surroundings to develop a competitive advantage that allows it to survive, lead, etc.

Sustainability: Is a term linked to the action of man in relation to his environment. Within the ecological discipline, sustainability refers to biological systems that can conserve diversity and productivity over time.

Sustainable Organizational Development: Sustainable organizational development focuses on value creation, environmental management, environmentally friendly production systems and the formation of human capital, social responsibility is linked to transparency, dialogue with stakeholders and care for the environment and the social inclusion.

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Index

A

adaptability 12-13, 78, 90, 110, 117, 122, 128, 192, 222, 358, 363-366, 370-371, 374-375, 381, 396, 436
 ALQ 243, 252, 254-257
 analysis 6, 26-28, 32-33, 37, 39, 41, 50, 56, 65, 67, 83, 86-88, 100, 102-103, 106-107, 110, 112, 114, 116, 120, 122, 129, 158, 161, 195, 197, 199, 203, 205-206, 211, 216-218, 222, 242, 249, 254, 256-257, 260, 266, 284, 286, 290, 306, 312, 315, 324-325, 337, 340, 344-345, 351, 354-355, 358, 363, 367-368, 370, 372, 376, 378-379, 397, 406, 420, 424, 426-428, 430-432, 435
 analytics 29, 77, 100, 105, 311-312, 316, 324, 337-338, 356, 408-409, 411-413, 416-417, 419, 422-424
 attachment 64, 156, 308, 312, 315-316, 326, 334-335, 337, 339-340, 343, 345, 348, 350-353
 authentic leadership 240, 243, 245, 247-249, 251-254, 256-258, 261-268

B

Bereavement 41-43, 48, 50, 54-65
 bioevent 217-218
 Boolean Equation 211, 224
 bubble 308, 321-322, 331, 339, 352-353, 356
 bubble and seal 308, 321-322, 331

C

Cassa Integrazione Guadagni 97, 101
 communication 9-11, 15-16, 36-37, 56, 68, 73, 76, 82, 93, 100, 103, 105, 109, 112-113, 116, 119, 121-125, 128, 144-146, 148, 163-170, 174, 176-178, 182-185, 189, 192-194, 205, 207, 209-210, 213, 218, 220, 223-224, 228, 238, 244, 246-248, 259, 266, 276, 278-282, 297, 299, 303, 338, 342, 344, 347, 355, 380, 388, 399, 405-406, 413-415, 418-419, 423-424, 427-433, 436, 438, 441-442

competence development 163, 165, 169, 172, 174, 176-177, 182-184, 186
 complexity 32-33, 66-67, 69-70, 72-73, 81, 86, 88, 93, 125, 247, 280, 361, 377, 393, 409
 consistency 145, 189, 203, 226, 248, 254, 273, 358, 361, 363-366, 370-371, 374-375, 381
 context factors 163-165, 170-172, 179-180, 184, 186
 Cost Minimisation 16, 19
 COVID-19 2-3, 18, 20, 23-43, 48, 56-57, 59-61, 63-64, 66-68, 70-76, 78, 80-83, 85-96, 98-103, 105-106, 109-110, 112-120, 127, 131-134, 136-137, 142, 151, 153-161, 163-168, 171-172, 174-175, 179-180, 182-183, 185-188, 190, 195, 206-211, 215, 217, 220, 222-226, 228-229, 236-241, 243-245, 247, 249, 259-260, 262-263, 265-267, 269-274, 280, 282, 285, 287-290, 296-300, 302-305, 307-313, 315-356, 358-359, 375, 378, 381, 383, 402-403, 408-409, 411-412, 416, 418-424
 crisis 2, 7, 23-34, 36, 38-41, 48, 63, 65, 72, 76-78, 86-87, 89, 91-94, 96-99, 101, 107, 114, 116-121, 132-133, 137, 185, 190, 192, 210-211, 216-217, 219, 221, 229, 231, 239, 243-245, 248, 262-263, 265, 269, 274, 276-279, 289, 303, 307-311, 316, 318-319, 322, 324, 331, 334-339, 342, 344, 353, 355-356, 359, 378, 426-427, 435
 crisis management 25-27, 32-33, 77, 91, 101, 308-311, 318-319, 334, 336-339, 353, 355-356
 cross-functional integration 403-405, 413-414, 417, 419-420, 424
 cross-functionality 403-407, 413-414, 416-417
 CSE 238, 242
 culture 4, 7-9, 13, 15, 17-19, 42-43, 49, 55-57, 63-64, 69, 74-75, 82, 85-88, 90, 92, 98, 103-105, 107, 118, 127, 134, 139, 141-142, 145-146, 148-150, 152, 167, 169-170, 174, 178, 181-184, 189, 193, 203, 210, 218, 221, 242, 244, 248-249, 262, 305, 358, 360-366, 371-372, 374-381, 388, 390-391, 400, 420, 435, 438-439
 Cyber-Resilience 409, 424

D

digital 13-15, 18, 25, 27-29, 36-37, 73-75, 79, 83-84, 86, 88-89, 93-95, 98, 100-101, 103, 105, 109, 115, 118, 122-124, 128, 130, 143, 149, 151-152, 157, 161, 163-170, 174-179, 181-184, 186, 206, 208-209, 215, 218, 220, 247, 259, 262, 287-289, 296, 298, 300, 302, 319, 345, 395-396, 399, 403-404, 410, 412-413, 419-420, 422-423, 436-437, 439
 digital transformation 25, 28-29, 37, 89, 94, 98, 101, 152, 177, 183, 208, 247, 262
 Digitalisation 183, 186
 distance 102, 106, 111, 118, 163-166, 168, 171-172, 175-176, 181, 183-186, 192, 204-205, 209, 213, 216, 219, 260, 300, 314, 316, 320-321, 331, 352
 dynamic ability 23
 dynamic capabilities 36, 39-40, 87

E

economic growth 294, 426-427, 429, 433-435, 442
 ecosystem 13, 66-71, 73-81, 84-88, 154
 EI 237-238, 242
 Electronic performance monitoring 403-404, 406, 418-424
 emotional intelligence 225, 232, 237-238, 242, 376
 employee attrition 1, 4, 19
 employee engagement 6, 9, 13, 16, 93, 98-99, 101, 116, 118-119, 122, 124, 129, 132-135, 144, 241, 248, 267, 283, 406, 436
 employee flexibility 89, 193
 employee retention 16, 89, 95-96, 98, 291, 304, 306
 employee well-being 1, 14-15, 19, 42, 89, 127, 190, 223, 408, 418
 Employment Needs 269, 272, 286
 employment relationship 188, 269-272, 274-275, 280-283, 286, 392

F

flexibility 1, 3, 7, 10-12, 14-15, 19, 28, 37, 39, 89-90, 102, 109, 112, 119, 127-128, 130, 132, 136-137, 141-142, 144, 148, 151, 159, 161, 168, 174, 182-183, 193-194, 214, 218-220, 222, 228, 248, 259, 390-391, 401, 408, 433
 flexible work options 15, 136, 141-142, 145
 flexible working 19, 72, 83, 116-121, 127-130, 132, 147, 159, 244, 256, 259, 301
 flexi-space 116, 129, 135
 Flexi-Space Working 116, 129, 135
 flexi-time 116, 135

Force Majeure 96, 101
 future of work 1, 18-19, 66, 74, 84-85, 88, 130, 159, 228

G

Gaussian approximation 308, 312, 314-315, 329-330, 337
 Goleman 237-238
 grand theories 66, 68, 70
 grief 41-52, 54-65, 211

H

health 19, 23, 31, 38, 41, 48-50, 54-55, 57-59, 63-64, 72, 75, 78, 80, 91-94, 96, 98-99, 103, 106-107, 109, 117, 120-121, 123-124, 129, 139, 146, 148-149, 159-160, 182, 188, 193, 206-207, 213-217, 219-221, 224, 228, 245, 254, 263, 270, 280, 284, 287, 297-298, 305, 309, 313, 315, 319, 323, 334-348, 350, 353-354, 359-360, 363, 375-378, 380-381, 392, 397-398, 402-403, 408, 412, 416, 418, 420-421, 423, 433-434, 436
 healthcare 11, 55, 64, 76, 139, 210, 213-214, 217-218, 224, 351, 358-363, 365-367, 372-377, 379-380, 392
 homework 163, 192
 HR ecosystem 66-68, 70-71, 73-75, 77, 79-81, 87-88
 HR in COVID-19 66
 human dignity 225, 237, 389
 Human Resource Development 39, 84-85, 100-101, 154, 157, 160, 221, 263-265, 302, 306, 310, 324, 342-344, 347, 385, 389, 394-395, 398-399, 402, 410, 417-418, 422, 424
 human resources 22-23, 31, 36, 41-43, 47, 56, 69-70, 72, 77, 79, 81, 84-85, 87, 93-95, 99, 102, 114, 116-117, 121, 131-132, 155, 165, 185, 187-188, 191-192, 195, 199, 201, 203, 222, 228, 236, 238, 265, 287, 289, 292, 301-302, 305-307, 318-319, 336, 352, 376, 384-387, 389-390, 393, 395-396, 399-400, 402-403, 421, 423, 428, 430, 433-435, 442
 human resources management 36, 42, 56, 77, 81, 87, 93, 102, 116-117, 131-132, 191, 265, 305-306, 393, 433-435
 hybrid working 15, 17-18, 52, 72, 75, 127, 134-135, 148, 170, 183

I

ICTs 224, 246, 287, 300, 307
 infectious disease 88, 186, 307-308, 319, 343, 345-346,

Index

348, 352, 354-356, 402
involvement 29, 69, 76, 78, 93, 118, 135, 138, 157, 191,
358, 360, 363-366, 371, 374-376, 381, 409-410,
428-429, 431, 435
isolate 320, 322, 337, 356

J

job satisfaction 3, 47, 119-120, 133, 138-139, 143-144,
146, 156-157, 193-194, 207, 209, 212-213, 215,
220, 223-224, 241-242, 246, 248, 262, 266-267,
375, 381, 422, 430

K

knowledge management 100, 148, 221, 307, 362, 380,
383, 385-387, 390-392, 396-398, 400, 402, 405,
417, 423
knowledge-based organization 383-385, 401-402
Kurzarbeit 96, 101

L

leader 9, 11, 19, 170, 181, 184, 189-190, 205, 226-227,
231-233, 235, 237-238, 240, 244-245, 247-253,
256-260, 263-264, 268, 274-275, 334, 375, 437
leadership 2, 8, 10-11, 13, 19, 21, 29, 56, 73-74, 82, 86,
114, 163, 165-166, 169-170, 174, 177-179, 181-
187, 189-191, 195, 205-207, 220-222, 225-229,
231-233, 235-236, 238-245, 247-268, 274, 281,
311-312, 316, 321, 324, 326, 334, 342, 344, 355,
361, 375, 378-381, 388, 393, 395-396, 398-401,
410, 428, 432, 434-438, 440-441
leadership behavior 225-229, 231-232, 238, 242, 262
long-duration 23, 31, 35-37, 40
long-duration strategy 31, 35-37, 40
loss 31, 41-44, 46-49, 52, 54-58, 60-65, 91, 127, 138,
194, 228, 273, 340, 392, 406

M

management 6-7, 10-11, 17-18, 23, 25-39, 42, 44, 49,
54-57, 59, 63-70, 73-74, 76-95, 98-102, 112-122,
124-125, 127-129, 131-135, 141-142, 144-145,
147-148, 150, 152-159, 161, 163-172, 174-187,
189, 191-192, 195, 199, 201, 204-207, 210-211,
213, 216, 219-222, 224, 227-228, 232, 239-242,
244, 254-257, 259, 261-267, 283-286, 288, 290-
295, 297-298, 303-311, 317-319, 334-341, 344,
353, 355-356, 360-362, 375-381, 383-402, 404-
411, 413-424, 427-442

media choice 184
mindset 7, 68, 73, 81, 126, 169, 174, 183, 225-226,
231-233, 235-240, 242, 318
mission 20, 31, 33, 67, 203, 249, 256, 268, 358, 363,
365-366, 371, 374-375, 377, 384, 396, 435
MLQ 243, 249-250, 253-255, 257
mourning 43-44, 48-50, 55-57, 59, 61, 63-65
Mutuality 269, 271, 280-281, 286

N

new normal 2, 10-11, 16, 28, 33, 35, 40, 74, 94, 117-
119, 121-122, 143, 150, 153-154, 158, 161, 181,
225, 228, 297, 384, 392, 396
next normal 29, 225, 242, 421

O

organization 23-38, 40, 49, 52, 54, 58, 61, 64, 67-70, 73-
82, 84-87, 89, 91-95, 98, 101, 103-105, 107, 110,
115, 117-119, 121, 123, 128-129, 135, 138-142,
147-148, 154, 160-161, 164, 166-168, 176-177,
180-181, 184-185, 188, 191-194, 202-203, 205,
207, 209-210, 215, 220, 226, 228-229, 231-232,
235-236, 238, 245-247, 249, 259, 262-263, 267,
270-274, 279, 281-282, 285, 287, 291, 298, 305,
308-311, 313, 315, 325, 328, 332-335, 345, 347,
354, 359-366, 374-377, 379, 381, 383-396, 398,
401-402, 405, 407-410, 414-417, 419-421, 424,
428-440, 442
organizational culture 8, 43, 56, 69, 75, 87, 104, 107,
148, 152, 167, 169, 178, 182, 189, 210, 218, 242,
262, 358, 360-363, 365-366, 371-372, 374-381,
400, 435, 439
organizational grief 41, 43, 49, 51, 54-56
organizational performance 135, 229, 253, 280, 358,
360-363, 365-366, 372, 374-381, 383, 389-390,
393, 395, 397, 401-402, 433
organizational resilience 32-34, 38, 40, 91, 99, 118
organizational sustainability 247, 426-427, 432-435,
437, 442
organizations 2, 23-28, 30, 32-34, 36-37, 41-42, 47, 49-
50, 54-57, 61, 66-82, 84, 86, 89-95, 98, 100, 103-
106, 108-112, 115-125, 127-128, 130, 136-137,
139, 141, 143-144, 146-148, 150-152, 159-160,
162, 164-168, 174-175, 177, 181-183, 186-187,
189-192, 209-210, 213, 215, 218-219, 221-222,
225-226, 228-229, 232, 236-237, 244-245, 247,
249, 258-260, 264-266, 270-273, 280-283, 285,
287, 291, 303, 307, 315, 319, 337, 341, 350, 360-
366, 375, 377-378, 381-396, 398-405, 407-412,

414-416, 420, 426-436, 439-442

P

pandemic 1-3, 6-7, 14, 16, 19-20, 23-43, 47-52, 54, 56-67, 71-73, 75-78, 80-82, 88-89, 91-95, 98-103, 105-113, 115-130, 132-134, 136-137, 142-143, 145-146, 148, 150-161, 163-179, 181-185, 187-188, 204, 206-211, 213-214, 217-218, 223-224, 226-228, 242, 244-247, 249, 258-260, 262-263, 265-267, 269-270, 272-275, 277, 279-282, 285-290, 296-300, 302-303, 307-312, 315-316, 318-319, 324, 326, 334, 336, 338-339, 341-355, 358-360, 363, 366, 374-375, 377-378, 381, 383, 392, 402-403, 408, 410-412, 416, 418-420, 422, 424

performance 3, 9-13, 18, 21, 29, 49-50, 67, 69, 76, 78-79, 89, 91, 94, 99, 104, 114, 116-119, 122, 125-128, 131-135, 137-139, 143-145, 149-150, 152, 157, 160, 176, 178, 185, 187, 189-191, 193, 195, 202, 212-213, 215-216, 218-220, 229, 231-233, 235-236, 238-239, 246-248, 252-253, 262-263, 265-267, 280, 282, 288, 290-293, 301, 304, 306-307, 326, 333, 358, 360-363, 365-366, 372, 374-385, 387-397, 400-404, 406-408, 411-412, 415-416, 418-424, 428, 430-431, 433-435, 437, 439-440, 442

performance management 29, 76, 79, 91, 116, 118-119, 122, 125, 127-128, 131, 133-135, 145, 150, 152, 288, 384, 388, 390, 393, 395-396, 401-402, 406-408, 415-416, 418, 422-423, 433

proactive 23-24, 31, 35, 38, 40, 69, 93, 272

Proactive Actions 40

productivity 1-4, 6-7, 10, 13, 16-19, 42, 47, 50, 57, 80, 93-94, 98-99, 106, 118-119, 130, 132, 136-137, 139, 141, 143-144, 146-147, 149-152, 154-155, 160-161, 167, 178, 188-189, 191, 193-194, 197-198, 201-204, 209-210, 212-215, 217, 219, 222, 225-228, 236, 238-239, 246, 273, 281, 283, 293, 299, 305, 360-361, 366, 374-375, 380, 390, 393, 395, 406-408, 412, 424, 433, 439-440, 442

protocol 22, 323-324, 331-332, 335, 356

psychological contract 269-272, 274, 283-286, 408, 423, 425

Q

Qualitative Inductive Content Analysis 116

quarantine 37, 110, 137, 266, 297, 322, 326, 332, 336, 356

R

reactive 23-24, 31, 35, 38, 40, 76, 292, 301

Reactive Actions 24, 35, 38, 40

recruitment 72, 95, 102-115, 118, 122-124, 176, 178, 180, 200, 204-205, 288, 291, 386-390, 392-393

remote leadership 163, 165, 185-186

remote learning 29, 211, 213, 224

remote work 1-4, 6-7, 10, 13, 15, 19-20, 22, 29, 37, 80, 117-119, 129, 131-132, 135-137, 142, 149, 151-153, 155, 157, 159-164, 175-176, 178, 185-186, 190, 192, 197, 203, 208-213, 216-218, 222-224, 228, 245-248, 264, 266, 277-278, 403, 408, 411-413, 416, 418, 420

reproduction number 312, 327-328, 337, 345, 356

resilience 23, 25-26, 28, 31-34, 36-40, 63, 77, 89, 91, 99-100, 102, 109, 112, 118, 277, 354, 362, 417, 442

resilience strategy 23, 31, 37, 40

Review 5, 8, 10, 12, 18, 22, 25, 33, 38-39, 41, 47, 58, 61-62, 64, 73, 82, 84-87, 90, 98-101, 114, 118, 133-134, 141, 143, 153-156, 158-161, 169, 184-187, 195, 206-207, 211, 219, 221-222, 225, 233, 239-241, 245, 249, 261-262, 264-267, 270, 283-286, 303-306, 310, 313, 323, 328, 337, 340-341, 343-344, 346, 348-350, 353, 355, 360-361, 363, 365, 376-377, 379-381, 397-401, 408-409, 416-424, 427, 436, 438-441

S

scale 24, 28, 34, 41, 50-54, 56, 59-60, 62, 64-65, 72, 79, 91, 108, 112, 117, 158, 225, 228, 236-237, 254, 262, 264, 272, 299-300, 309-310, 322, 338, 354, 358, 366, 376, 406, 426

seal 308, 321-322, 331, 356

security 10, 21, 28, 32-33, 79, 120, 146, 150, 152, 202, 228, 246, 269, 271, 275-277, 279-282, 285-286, 323, 392-393, 403, 406-407, 409, 415

service delivery 293, 383-386, 388-402

SME 38, 97, 241-242, 287-307

social exchange 194, 247, 269, 271, 280, 283, 286

social identity approach 312, 315-316, 326, 334-335, 337, 441

social inclusion 29, 426, 433, 442

social network 55, 105, 108, 312, 315, 324-326, 335, 337, 340, 344, 351, 354

social networks 102-103, 105, 108, 111-112, 115, 197, 341, 352, 437

sociogram 325-326, 334, 336, 356

staffing 74, 287, 291, 305, 307, 389, 415

strategic HRM 89-90, 440

Index

strategy 14, 23-25, 27-33, 35-37, 39-40, 66-67, 69, 73-75, 80, 82, 87-89, 103, 105, 115, 142, 166, 199-200, 214, 222, 253, 285, 291, 308, 319, 322, 324, 347-348, 361-362, 379-381, 383, 386, 389-390, 394, 396-397, 400, 404, 418, 420, 426, 432, 434-435, 438, 440, 442

support 2, 8, 10, 12, 16, 22, 25-26, 28, 36, 42, 44, 48-49, 55-57, 60, 62-63, 65, 67-69, 72-73, 75-76, 78, 81, 94, 98, 109-110, 112, 117, 119-121, 125, 131, 137-140, 142, 145-149, 151-152, 156-157, 165-170, 172, 175-179, 181-184, 186, 190, 192, 201-202, 210, 213-215, 217, 219, 223, 227-228, 247-248, 253-254, 260, 264, 270, 275, 277, 282, 292, 294, 298-299, 303, 319, 324, 335, 338-339, 361, 363-364, 376, 391, 394, 403-407, 410-412, 415, 420, 424-425, 430-433, 435-436

sustainability 70, 73, 75-77, 81-84, 87, 89, 158-160, 188, 229, 247, 262-263, 287, 293, 295-296, 304, 306, 397, 418, 426-429, 432-435, 437-442

sustainable organizational development 426-431, 433, 435-436, 440, 442

systems theory 66, 68, 70, 81, 83, 86

Systems thinking 68-69, 83, 88

T

Tattleware 210, 224

technology 1, 6, 10, 13, 19, 22-23, 25, 31-32, 68, 70, 73-74, 77-79, 81, 83-84, 87, 94-95, 98, 105-111, 113, 120, 122-127, 133-134, 142-143, 145-146, 148-150, 152, 157-158, 161, 166-169, 174, 176, 178, 183, 192-193, 212, 215-217, 219-220, 222-223, 244, 247, 265, 269, 279, 283, 287-288, 294-298, 300-306, 319, 336, 344, 348, 354, 357, 361, 377, 380-381, 383, 386, 393, 397, 399, 402-404, 406-407, 410-411, 413, 415, 417-418, 420-424, 436, 440

telecommuting 90, 137, 141, 143, 163, 185-186, 193, 208-209, 211, 218-223, 245, 261-263, 267

Telehealth 217, 224

telework 92, 111, 131, 163-168, 170, 172, 174-177, 179-180, 182, 184, 186-189, 192-195, 197-198, 204-205, 207-209, 211, 219-224, 243-248, 256, 259, 265, 268, 271, 281-282, 418, 422

teleworking 110-112, 117, 126, 129, 133, 143, 153, 166, 168-169, 179, 184-185, 187-190, 192-195, 197-199, 204-205, 207, 209, 220-223, 243-249, 253-260, 262-264, 266-267, 278

training 8, 10, 15, 29, 33, 55, 61, 73, 76, 81, 91, 94, 104-105, 107-108, 118, 123, 125, 128-129, 137, 141, 145-146, 149-150, 176-177, 183, 189, 199, 201-204, 216-217, 227, 231, 239, 263, 287, 289-

298, 300-307, 359, 362, 377, 386-390, 393-397, 399, 402, 406, 410-411, 414-415, 428, 431, 433, 437, 440-441

transformational leadership 189-190, 207, 240, 242-243, 245, 247-253, 256-258, 262-264, 266-268, 378, 435-436

trust 9, 37, 145, 148, 166-167, 169, 174-175, 178-179, 186, 189-190, 196, 206, 209, 212, 215, 218, 220, 223, 228-229, 238, 244, 247, 251, 253, 259-260, 262, 267, 269, 271, 273-276, 278, 280-281, 284, 286, 310-311, 316, 321, 334, 342, 375, 377, 380, 387, 391, 399, 408, 417-418, 428, 430-433

U

understanding of leadership 225-226, 231-232, 238

V

ventilation 312-314, 323, 331-332, 338-339, 342, 346, 348, 350-352, 354

virtual collaboration 174, 183, 208, 215

virtual management 163-172, 174-184, 186

W

Wells-Riley model 312-313, 323, 330, 337

work design 160, 191, 222-223, 267, 403, 408, 416, 422, 424

work from anywhere 16, 130, 142, 161, 208-209, 211, 224

work from anywhere (WFA) 142, 209, 224

work from office 1-3, 5-6, 10, 19

work life balance 159

Work Policy 1, 10, 17

work-family 80, 90, 94, 137, 139-141, 143, 146-147, 149, 153-157, 160, 162, 193, 221, 228, 392

Work-Family Interventions 162

Work-from-anywhere 132, 154, 219

work-from-home 72, 117, 136, 155

work-life 3-4, 7, 15-16, 68, 78, 90, 94, 117, 132, 134, 138, 141, 143, 145, 147, 149, 152-153, 155, 157, 159-160, 162, 168, 178, 193-194, 199, 206, 210, 212-213, 218, 220, 224, 246-247, 266, 276, 408, 412, 418

work-life balance 3, 7, 15, 90, 134, 143, 147, 160, 168, 178, 193, 199, 206, 210, 212-213, 218, 224, 246-247, 266, 276, 408, 412, 418

workplace culture 42, 118, 145, 193, 249

workplace flexibility 136-137, 141-142, 144, 148, 220

Workplace Policies 19

Workplace Productivity 136