

# **Virtual Leadership: on becoming a real leader**

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Ghislaine Caulat

Institute for Work Based Learning  
Middlesex University

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## Abstract

Virtual working is truly nothing new. This way of working (mediated by communication technology) has been practised for at least twenty years and a lot has been written on this topic. However after so many years virtual working remains an unsatisfactory practice which at best is considered as 'second class', something you do when you cannot travel. In the light of incremental globalisation, as well as growing concerns for the environment and for a better life quality, it has become more crucial than ever to master virtual working.

In 2006 I embarked on research grounded in the Action Research methodology, and my intention has been to put this work in the service of leaders who need to lead virtually and want to improve their practice. I worked alongside several leaders who had to learn and lead virtually, and we explored together what it takes to lead effectively in the virtual space.

The results can be summarised as follows:

- One of the main reasons that virtual working has remained unsatisfactory is that the leadership aspect of this work has been underestimated, if not completely forgotten. Most literature speaks about 'managing virtual teams' and focuses on the tasks at hand and the things to do and not do. My research shows that leading virtually represents a new discipline, different from traditional leadership, that needs to be recognised as such and learnt.
- In the process of learning to become effective virtual leaders, leaders need to go to a deeper level of reflexivity, and question key aspects such as their own sense of identity as leaders, relationships, trust and power. In so doing they realise that some of their practices actually become questionable in the traditional leadership practice as well. By learning to lead virtually, the leaders I have worked with have learnt to become better and 'real' leaders.
- In the same way that leading virtually needs to be considered as a new discipline of leading, the research on virtual leadership requires new methodologies. It adds to and amplifies the questions raised in the last ten years by some academics, who claim that a fundamentally new approach in leadership research is asked for, namely one grounded in social

constructionism, existentialism and phenomenology, and with a stronger focus on reflexivity.

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## Introduction

Working and leading virtually have become a growing concern and hence a growing area of focus in the last few years, generated by an increased care for the environment, a concern for a better life quality, the need to cut costs and/or the desire to welcome Generation Y (people born in the '80s who have grown up with all virtual media) into the corporate world.

However for most managers and leaders in organisations, working and leading virtually has remained an area of frustration, at best a 'second-class' way of working, something that you do when you have no other choice.

For most people virtual working is associated with something that is not real and, for the vast majority of managers I have come across in organisations, personal contact can only equate to face-to-face. In addition, several stories of abusive relationships developing on the internet and reported by the media have not helped to create a positive openness, at least for the sceptical among us.

Nor has the flurry of books with recipes and 'how to' lists around virtual working really helped to overcome the hurdles and apprehension. 'Virtual' still remains in many people's heads something unreal and linked with technology which can therefore only be of limited benefit in the work place.

The interesting thing is, however, that the word 'virtual' is an old word, first appearing in the late 14<sup>th</sup> Century and meaning: "influencing by physical virtues or capabilities", from *virtualis*, and *virtus* "excellence, potency, efficacy"<sup>1</sup>. In the mid 17<sup>th</sup> Century the word's semantic field expanded and incorporated the idea of 'essence'.

My inquiry into what it takes to lead effectively virtually actually reconfirms the original sense of the word 'virtual' and shows that, paradoxically, by learning to lead well virtually leaders become better leaders than they were before, becoming more anchored in the awareness of their being as leaders to others. It is as if they become

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<sup>1</sup> Online Etymology Dictionary, © 2010 Douglas Harper  
virtual. (n.d.). *Online Etymology Dictionary*. Retrieved March 29, 2010, from Dictionary.com website: <http://dictionary.reference.com/browse/virtual>

more aware of their 'virtue' and 'essence' as a result, or as if they become more 'real' in their presence and their quality as leaders.

I have undertaken this inquiry in the context of the Ashridge Doctorate in Organisation Consulting (ADOC). Unlike a lot of PhD programmes which focus mainly on the individual student and his/her supervisor, ADOC is a programme based to a large extent on learning with and in the group of students (including faculty) in addition to individual learning. The programme consisted of a series of faculty led workshops followed by a series of student led workshops, when all students in the group had the opportunity to facilitate a workshop on their topic and test their findings with their peers. Furthermore learning happened in smaller groups of up to five people, the so-called 'supervision groups', where each of us shared on a regular basis our progress in our inquiry and received challenge and support from our supervisor and our peers.

I believe that my primary contribution through this research has been to develop the practice of leading and working virtually. In so doing I have also raised what I think are important questions regarding both research methodology and knowledge in the field of leadership in its broader sense, not limited to virtual leadership.

My inquiry has felt at times exciting, extremely rewarding and energising, and at other times anxiety provoking and frustrating. It has felt like an inquiry into unknown territory with external forces (like some of my ADOC peers or some faculty members) drawing me back to apply the known to the unknown. My determination to discover the unknown from a place of not knowing, with all the risks of failure it might involve, has led me to several moments of anxiety and excitement at the same time. I have made a conscious choice to explore and map the territory instead of going down one selected path. After four years of journeying and mapping I feel that there is still so much more to discover, so many more landscapes to visit.

One of the greatest joys of my journey has been my companions along the way, all the leaders who have allowed me to share their journey for a while. They were all real leaders in the real corporate world with very demanding jobs, real concerns and difficulties. Accompanying them in their day-to-day practice of leading virtually has allowed me to gain real insights and learning, and I believe the same has happened for them. May these insights and learning be of use and inspiration to many more leaders out there.

# 1. The purpose of my research

Before entering into the field of my research I am keen to make its purpose explicit. I will do this in two steps: I will first explore the purpose of Action Research as a methodology and situate my research in it, and then become more specific about the reasons why the topic of virtual leadership is so important to me.

## 1.1 Action Research and its purpose

The scope of my research has remained constant over the duration of this thesis and I have summarised it as follows:

“I will inquire primarily into virtual leadership, which means into the phenomenon of intentional influencing by one person of other members of a group or organisation (whereby this person might change over time) in an organisational environment, where interaction happens predominantly through computer-mediated and phone communication” (Caulat, 2007).

I have regularly revisited my purpose for this research, especially when I felt confused or was struggling. This in turn has led me to explore in depth the purpose of Action Research as the methodology that I have chosen (in Chapters 3 and 4 I will come back in more detail to the characteristics of this methodology).

I am aware of several views of the purpose of Action Research. For example Reason and Bradbury (2001) advocate that Action Research is about helping organisations and individuals to develop more practical knowledge and well being (economic, political, psychological and spiritual): they consider the purpose of Action Research as: “[...] to produce practical knowledge that is useful to people in the everyday conduct of their lives. [...] it is to liberate the human body, mind and spirit in the search for a better, freer world.” (Idem, p.2)

McKernan (1996) shares this point of view: for him “The aim of Action Research, as opposed to much traditional or fundamental research, is to solve the immediate and pressing day-to-day problems of practitioners.” (Idem, p.3).

Burns (2007) also agrees with a value-based Action Research, but advocates extending its focus beyond the individual and groups (even organisations) - which is what most Action Research theorists seem to concentrate on - and aiming for large scale systemic interventions at the level of society, with the purpose of helping whole systems to change.

On the other hand, Stacey and Griffin (2005) claim that the purpose of Action Research is inquiring at a micro-level into what is going on between individuals, and into the local learning emerging from these individuals in the moment, with no further agenda beyond that. For them Action Research is not “about restoring meaning and mystery to life so that the world is experienced as a sacred place” (Idem, p.34), it is about human interaction itself, where meaning cannot be a given but will tend to arise in a specific ‘local’ situation, not in the form of a general idealisation but in the form of a ‘particularisation’. They define the value of Action Research as follows: “What is particularly valued is the activity of exploring and explaining the differences between alternative ways of making sense of experience. The value may be summarized as ‘taking one’s own experience seriously’, thereby attaching particular value to the subjective” (Idem, p.35).

Putting these contrasting views next to each other helps me to realise and confront my own intention. What is behind my passion for my topic is not only the understanding of my experience of it, but also my intention to help others, more precisely leaders, to develop their virtual leadership, because I genuinely believe that it will make a difference to this world. Should I call this an ideology, as Stacey might hint it is? Potentially it is, even if I dislike the word because it is loaded with many political and religious connotations. At the same time I believe that my efforts are also motivated by a practical intention, namely, as McKernan advocates, to help leaders “solve the immediate and pressing day-to-day challenges” (see above) of having to lead potentially large teams from a distance, particularly in the current economic climate of reduced travelling budgets. Like Reason and Bradbury (2001), I would situate the purpose of my research within organisations to start with, and not aspire to a wider scope as Burns does (2007), even though one could argue that by its own nature ‘virtual’ leadership would lend itself well to such a wider scope.

At the same time, inspired by Stacey and Griffin (2005) I have nevertheless continuously challenged myself as to the quality of my reflection on the processes of the local interactions in which I was engaging with others; and together with others, I

have questioned how well I have been engaged in making sense of these interactions (see in particular Chapters 3 and 5). I really believed that only in this way could learning emerge for my co-inquirers and myself, and resonate with other leaders out there.

## **1.2 Why is the topic important to me?**

I feel very attracted to all questions around virtual communication and the different forms of relating virtually, probably partly because in my private life (I moved several times between countries) the majority of my relationships with friends and family have been nurtured and sustained in a virtual environment. The act of connecting virtually in those private relationships has always fascinated me: I have been interested in particular by how the quality of my connection with my friends and family in a virtual environment is sometimes richer and more powerful than my face-to-face communication with them. There is something so dedicated and focused in these moments of virtual connection that it creates a special quality of connectivity which is sometimes difficult to replicate in face-to-face environments. At the same time I am aware that most people still have the opposite view of virtual communication and emphasise its drawbacks; for example, the abuse of virtual interaction with others on the internet where people are not constrained by their physical appearance and can make up new identities, with all the dangers this might involve (eg the press in several countries has reported on a number of stories of young girls abducted by men as a result of an internet relationship). Conversely people like Hine (2000) or McKenna and Bargh (2000) underline that the use of virtual communication and the internet in general has often been demonised, whereas research shows that “the Internet does not, contrary to current popular opinion, have by itself the power or ability to control people, to turn them into addicted zombies, or make them disproportionately sad or lonely (or for that matter, happy or popular), and neither does the telephone, or television, or movies [...]. Like the communications advances before it, the Internet will always and only be what individuals make of it.” (McKenna and Bargh, 2000, p.72).

Another driver of my interest is increasing globalisation, which makes it critical for our clients to learn to create a strong connection in order to develop and sustain powerful and generative relationships across organisations and geographical boundaries. I want to put my interest in virtual communication in the service of helping our clients to become better virtual leaders. This not least because I strongly

believe that by improving the quality of our virtual connectivity we will improve the quality of our lives, and significantly contribute to sustaining our environment through travelling less, or at least becoming more choice-ful about our travelling activities. At the same time we will be able to connect with more people around the world, and our connections will be more diverse. If we manage to develop strong and meaningful relationships with others we will be able to learn more from each other and develop a stronger collective intelligence that might help us to grow as a human race. And who knows.... as a result we might also be able to avoid more wars and national conflicts.

Finally, my strong interest in virtual leadership also represents my own drive for leadership: I want to 'take a lead' and contribute to this area of development. In other words I see my research in virtual leadership as an enactment of my own leadership.

## **2. Situating my research in the field**

In this chapter I intend to situate my inquiry in the overall field of research. I first give an overview of the research available on the exact topic of virtual leadership before attempting in a second step to position my topic within a wider theoretical framework, in the spirit of offering a robust underpinning for what seems to be a new area of inquiry.

### **2.1 Current status of research in the field of virtual working and virtual leadership**

I would like to start by commenting on what I understand to be the current status of research into virtual working and virtual leadership. By 'current status' I mean the status of research at the time of writing this thesis (November 2009 to April 2010).

The issue of virtual working in organisations has kept many minds busy in the last ten years. Powell and Piccoli (2004) present an overview of the literature written so far on the subject. This overview shows that there have been several phases of writing on the topic. First there was the opinion that if one ensured that the right technology was in place virtual working would be efficient; then, in the nineties, the literature focused more on getting the right team and the right processes in place in order to ensure effective virtual working. This line of thinking has been developed further and has led to an impressive amount of what I call 'recipe books' about virtual working and virtual teams. In the last five years more literature has been published about trust and managing performance in the virtual world. The focus on *virtual leadership* as opposed to *managing virtual teams* has been limited, however, and the two books I found, from Val Williams (2002) and from Jaclyn Kostner (1996), are more guides to developing good virtual leadership as opposed to an exploration of what it takes to lead effectively virtually.

In order to guide my readers through the discourse of this paper, I would like to specify what I mean by 'leading' and 'managing'. I am aware that this differentiation has been at the core of numerous debates (for example Zaleznik, 1992), and I do not want to enter into these debates at this stage, as I will explore throughout my inquiry what I mean by 'leading' in the virtual space. Nor is it my intention to offer here the ultimate definition of 'managing' and 'leading', rather I intend to give some initial orientation to my readers, since I agree with Alvesson and Deetz (2000) who



claim: “Rather than seeking definitions and moving to categorize, we should ask: what are we able to see or think about if we talk about it in this way rather than that?” (Idem, p.43). With that caveat in mind, by ‘managing’ I mean planning, co-ordinating, and monitoring activities and performance, with a primary focus on processes. By ‘leading’ I mean focusing primarily on relationships and culture, giving a sense of direction and helping others to develop. In my view they are not mutually exclusive, but complementary.

If one looks closely at the extensive literature on managing virtual teams, one notices that in recent years authors include a few pages on leadership aspects. They also often do this by mentioning the ‘emerging leadership’ within virtual teams (eg, Gibson and Cohen, 2003). Others develop comprehensive lists of tools and models on how to manage virtual teams, and dedicate a few pages to the leadership aspect at the end of the book (Garton and Wegryn, 2006). Even the impressive “Handbook of High-Performance Virtual Teams. A toolkit for collaborating across boundaries” from the editors Nemiro et al (2008), as the title suggests, concentrates on the tools and dedicates only three chapters among 30 to the leadership aspects of working virtually. The latter strongly link the leadership functions in the virtual space to the traditional elements of leadership (eg, a chapter by O’Neill, Lewis and Hambley, 2008, “Leading Virtual Teams. Potential Problems and Simple Solutions”, suggests that the leadership functions of a virtual team leader consist of motivating, co-ordinating and developing team members). Powell et al (2004, p.18) in their review of the literature on virtual teams made the following observation: “Following a familiar pattern, recent virtual teamwork has attempted to extend our knowledge of leadership in co-located teams to the new environment. Little attempt has been made to explore novel approaches that stem from an understanding of the idiosyncrasies of the virtual environment”. I would argue that their statement is still valid today, with maybe one exception that I have come across so far, namely Malhotra et al (2007) who, based on their blended research approach (interviews, web-based surveys and observing one virtual team), develop a list of six practices of virtual team leaders, some of which take the idiosyncrasies of virtuality into account. I will come back to the findings of Malhotra et al in Section 6.1 and show that they offer a useful starting point for virtual leaders, although unfortunately far from being sufficient in my view.

In particular, in the course of the last two years I have regularly received emails from people asking me to share my findings as there is not much available. One example is an email received on 7<sup>th</sup> Feb. 2010, written by Linda:

“I have been reading your materials and am very excited. I am working on my PhD in virtual leadership as well [...] I would love to collaborate with you, as you are the first person in all my studies who is pursuing the same topic; research continues to be in the infancy stages [my observations]~ what an exciting time we are in. [...]”

In most cases so far the research methods on leading and/or managing virtually have been limited to either internet based surveys (online questionnaires) and/or semi-structured interviews. There is notably an important PhD thesis by Eichenberg on Distance Leadership (2007). Most articles, including this thesis, approach the topic first from a theoretical point of view and then check their hypotheses through research. For example Eichenberg proceeds to a vast review of the literature on leadership and other disciplines, and develops as a result 28 hypotheses that he then validates through an online questionnaire completed by 111 people. Based on the results he then derives models for effective distance leadership. Kayworth and Leidner (2001/2002) have a similar approach in their study of 13 virtual teams in three universities based on surveys combined with open ended questions.

Remdisch (2006) criticises the fact that most of the research discourse on distance leadership is theory-based or remains at a superficial level. Together with a colleague, she started a project in 2004 at the University of Lüneburg and interviewed 61 leaders across Germany. She then added further interviews with 70 leaders of a global automotive manufacturer. The results, presented in 11 pages of her article, include interesting aspects in terms of what virtual leaders should do (eg develop trust, develop a team, develop the individuals in the team, ensure communication, etc.), but unfortunately remain rather superficial and very much linked to activities. She also comes to conclusions, based on the views of the people she interviewed, that I would like to challenge: for example the need for leaders to meet face-to-face regularly in order to develop successful virtual teams. I will come back to this aspect in Section 5.3.3.1.

Furthermore, research is often limited to one organisation. This has been the approach chosen by, for example, Buhlmann (2006) with his DBA dissertation

“Managing Virtual Teams: A Case Study at Dell Europe”, and by Joshi, Lazarova and Liao (2009). The latter clearly underline the importance of leadership when working virtually, and particularly ‘inspirational leadership’, through their web based research carried out in a single Fortune 500 hardware and software multinational company.

Zhang and Fjermestad (2006) identify the paucity of theoretical development in virtual team leadership research and propose that such research can be more rigorous and enriched by applying traditional leadership theories, specifically traits theory and contingency theory. Although I would not necessarily agree with their wish to apply traditional leadership theories (I will explain why in Section 3.3) I can certainly confirm, based on what I have found so far, that four years after their paper was published their statement regarding the paucity of theoretical development in research remains valid.

Even if they have not directly researched into virtual leadership, I would like to highlight the following two authors because I find their work very important and helpful in the context of my research.

Suler (no date, a and b), a clinical psychologist and practising psychotherapist, has done some very interesting and useful research on the psychology of the internet. In particular he has done an analysis of the psychodynamics going on for people when they relate via the internet. I will come back several times to his views, particularly in Section 2.2 and Chapter 5.

Panteli (2003, 2004, 2008) wrote on trust in virtual teams and this, in my view, represents a key pillar in the research on virtual working and virtual teams, because it has been a continuous effort of research and provides a model of trust different from the ones traditionally used in face-to-face environments. I will also come back to Panteli’s work in Section 5.3 when making sense of my own research findings.

As the sources regarding virtual leadership in organisations are limited I have needed to draw from further afield.

## **2.2 Theories informing my thinking**

Because of the relative 'newness' of the topic, I have believed from the start of my research that it was critical for me not to fall too quickly into specific categories of thinking or disciplines.

I agree with Lincoln's view that "There is a great potential for interweaving of viewpoints, for the incorporation of multiple perspectives, and for borrowing or bricolage, where borrowing seems useful, richness enhancing [...]" (2000, p.167). Therefore I have chosen to take an eclectic approach, drawing from several disciplines and theories not always embedded in the participatory paradigm within which I situate Action Research. My hope has been that by so doing I would be able to walk on the 'epistemological edge' and explore in a flexible, and hence potentially novel, way the key aspects of virtual leadership.

Based on my own experience of virtual working so far (I started this work in 2003 and wrote my Masters thesis on Audio Action Learning<sup>2</sup>) I chose to focus on what I believed were three key aspects for my research on virtual leadership: virtual connectivity, the 'social field', and leadership, and considered these in the light of different theories. I will explain in more detail in the text below why I chose these three aspects and which theories I have drawn from in order to explore them.

### **2.2.1 Virtual connectivity**

I would like to define what I mean by 'virtual connectivity' first: I mean the way and the degree in which people connect with each other in the virtual space. One of the assumptions I make is that for effective virtual leadership to happen people need to connect well virtually. Since I define virtual leadership as the "phenomenon of intentionally influencing" (see p. 3) I believe that one can't influence virtually without being well connected and in relationship with others. Looking across different theories I notice important differences that are particularly critical for me to consider during my inquiry.

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<sup>2</sup> Caulat, G 2004, "Be heard but not seen" Ashridge Master in Organisation Consulting (AMOC) thesis, Ashridge Business School

## ***Gestalt and virtual connectivity***

Gestalt theory attributes much importance to the awareness of the unity of mind, emotions and body for the individual (Clarkson and Mackewn, 1993). Gestalt considers how human beings interact and organise in certain patterns their perception of others and their environment, based on their experience of the latter, in the present moment (Köhler, 1947). I understand that the key is to be aware of the three levels at the same time (mind, emotions and body: eg how my emotions influence what I am thinking in the moment or how my bodily experience impacts on the way I think about something) and to share this awareness with others, as well as to enable others to develop this awareness (Nevis, 2001).

In a virtual context one can still be fully aware of one's mind, emotions and body but it will be impossible (at least in a non verbal, written word-based virtual exchange, for example when interacting in a blog) to be aware of other people's body posture. Nevertheless, when it comes to audio virtual environments (eg teleconferences or web conferences where people are linked via a phone line and documents that they share) I find Perls's view of the importance of the voice particularly relevant: "self-expression comes out somewhere else (other than verbal communication), in our movements, in our posture, and most of all in our voice. A good therapist doesn't listen to the content of the bullshit the patient produces, but to the sound, to the music, to the hesitations... The real communication is beyond words." (Perls, 1969, p.73).

My experience in audio based environments is that rich connection with others can be developed through trained listening, focusing on all elements of the voice (rhythm, intonation and speed of speech). In an audio based environment one can be fully aware of one's bodily experience, share this awareness with others during the event, be fully focused on the voice of others, and thus remain in strong contact with others. I will explore this aspect in more practical terms when sharing my research findings in Section 5.1.3. Obviously the Gestalt view cannot apply in the context of non-verbal virtual communication where only written words are exchanged.

### ***Further psychological theories and virtual connectivity***

Virtual connectivity moves into a different light if we look at a few more psychological theories.

For Argyle and Dean (1965) the concepts of intimacy and immediacy are critical to help people to connect well with each other. Immediacy can be defined in two ways: non-mediated (communication not through another medium such as the phone or the internet) and as 'on-the-spot' or immediate reaction. The concept of intimacy can be understood as an atmosphere where closeness and trust prevail. From my own experience of working in audio action learning settings<sup>3</sup> I think that the concepts of intimacy and immediacy are actually closely linked: I feel well connected in virtual environments that I experience as intimate, allowing me to react openly and spontaneously ('on-the spot'), even if there is the obvious mediation of the phone line. I actually encourage participants in audio action learning to work against the traditional teleconference etiquette and to react on the spot without fear of interrupting each other. I note that Argyle and Dean's views are more difficult to apply to the asynchronous mode<sup>4</sup>, given that the latter has obvious constraints in terms of immediacy.

In recent years several authors writing from a psychological perspective have spent considerable effort researching what enables presence to develop in virtual environments and how it can be defined. I would like to establish a link here between the concept of presence and the notion of virtual connectivity: my assumption is that people can connect well virtually if they feel present in the virtual communication, and if they feel each other's presence. Lombard and Ditton (1997) define presence as "the perceptual illusion of non-mediation". People can only feel truly connected with one another once they stop noticing the mediated basis of their communications. In other words, it is the extent to which a person fails to acknowledge the existence of a medium during a technologically mediated

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<sup>3</sup> Action learning is a learning format originated in the 1940s by Professor Reginald Revans where typically a group of five to six people work together on their individual issues in the context of their work, and identify possible solutions or approaches through a reflexive process of exploration of their own assumptions, behaviours and beliefs. As a result of my AMOC thesis in 2004 (Caulat 2004) I have developed a virtual approach to facilitating action learning that I called 'audio action learning'.

<sup>4</sup> Asynchronous mode: people in different places connect with each other at different points of time, in other words not at the same time (for example on a blog) as opposed to - Synchronous mode: people in different places connect at the same time (independently of their time zones), for example in a phone conference or a web conference.

experience in the virtual environment. The aspects that they select are very much linked with the technology: what are the conditions that technology needs to put in place so that a person can feel present and connected in a virtual environment. I would argue that it is not only about the technology but also about what leaders can do to enable people to feel present in the virtual space.

Suler (no date, a) also conceptualises the notion of presence in the virtual environment. He lists conditions that need to be in place not only at the technological but also at the social level. For him 'environmental presence' is enabled by the technology, because it provides conditions such as sensory stimulation, changes in what is happening on the virtual platform used (eg movements between the visuals and documents used), etc. There is also the importance of 'interpersonal presence', which means the social interaction with others in the virtual environment, eg doing something with or to them, something being done to me by them, familiarity with others, the opportunity to show my individuality to others, perhaps through my blogging style, through the way I write emails, etc.. But what I find most thought-provoking is his notion of dissociation between our physical presence (our body sitting on the chair in the study) and our online presence:

“Despite the powerful possibilities for presence online, we must remind ourselves that indeed our body sits in a room, in front of a computer, in a setting that is quite different from the online encounter. We may not even be consciously aware of that setting around us, which points to the importance of dissociation in allowing us to experience presence online. To fully immerse ourselves into the environments and relationships of cyberspace, we must be able to minimize awareness of the setting around us - at least for a time. If the phone rings or the dog barks to go out, we shift our attention back to our physical surroundings. We cannot immerse ourselves fully into cyberspace and in-person presences simultaneously, no more than we can completely immerse ourselves into different online settings or relationships simultaneously”. (Suler, no date, a, page number not available as retrieved from the web)

I notice that I have a strong reaction towards this notion of dissociation. I am still not sure how this can happen. For example, if I am feeling cold because the temperature is dropping in my study, my online presence and the way I connect with

others virtually might be impacted because I might not be able to concentrate well. In this case for me to be in full contact with myself, which is required in order to be in full contact with others in the cyberspace, I need to incorporate this awareness of being cold, and potentially express this to others. I understand that we cannot be fully immersed into two spaces (whether face-to-face and virtual or two virtual spaces) at the same time, but it seems to me that it might be helpful to look at a new quality of presence and connectivity emerging in a situation when a person is in their study (possibly with a child playing next to them) and is interacting with people on the internet at the same time. Instead of thinking in terms of either/or and judging that therefore no full presence is possible, I would currently be more inclined to explore the quality of this new kind of presence emerging from the situation, as well as the new kind of connectivity. For example I will explore this quality with my co-inquirer Mark in Section 5.1.5.

I also find Suler's (no date, a) thinking in terms of the 'now' very stimulating:

"But is presence less developed in asynchronous communication? When reading e-mails or weblogs, do those other people seem less like they are with us NOW (sic)? We know that they probably will not react, at least not immediately, to what we say, so interactivity is delayed - and some might say weaker - compared to synchronous communication. Yet in many other respects we sense that they are here now, just as writers of poems, stories, and essays create the sense that they are with us in the moment. When we open an e-mail message or enter a discussion board, we open the Now (sic)". (Idem, page number not available as retrieved from the web)

Suler's views, combined with my own experience of working virtually, have encouraged me to look at the concept of 'here and now' differently. I have realised that the feeling of being 'here' and 'now', present, resides in the human mind and is not necessarily linked to specific moments in time.

This in turn brings us back to the debate around human consciousness. In the 17<sup>th</sup> Century, Descartes is keen to demonstrate that the centre of consciousness is the mind ('cogito ergo sum' in 1637) which can and does exist apart from the body. Then at the end of the 18<sup>th</sup> Century the so-called phenomenology (starting with Hegel, then Husserl in the 19<sup>th</sup> Century) reacts against a philosophy detached from the human body experience. Merleau Ponty (1945), a well known phenomenologist, radically contradicts Descartes's view and puts the emphasis more on the bodily



experience as a way to experience contact with others, with oneself and with the world in general. As a matter of fact, according to Merleau-Ponty (1945), one could argue that we **are** our body. According to Merleau-Ponty the mind cannot exist independently from the body because the latter impacts on the way the mind perceives the external world. Later on, Lakoff and Johnson (1999, p.19) will also very much argue in the same direction and in a convincing way: “What is important is that the peculiar nature of our bodies shapes our very possibilities for conceptualization and categorization”.

This debate is in my view very relevant when it comes to connecting with others and leading virtually: most of my clients tend in the first instance to associate virtual working and the way they connect with each other virtually as a mere intellectual exercise, or an activity from brain-to-brain (since our respective bodies are in different physical places); but after a while they realise how critical it is to actively work with the awareness of their own bodies in order to connect well virtually with each other. My research has certainly shown the importance of bodily awareness as a critical factor of strong presence and connectivity in the virtual space. I will come back to this in Section 3.5.5.

### **2.2.2 The social field**

In this section I would like to explore the different ways in which diverse theories represent social interactions between people, and the assumptions that are made about these. A way to define what I mean by the ‘social field’, albeit a rather simplistic one, would be to say that whereas by ‘virtual connectivity’ I mean the manner and the degree in which people connect with each other virtually, by the ‘social field’ I mean the sum or the whole of these connections and, as a result, the social interactions between people.

Since I am inquiring into the phenomenon of leading in the virtual space, the theme of interactions between people, the ‘social field’, is central to my research.

#### ***The social field from the ‘complex responsive processes’ perspective***

The complex responsive processes perspective as coined mainly by Stacey and Griffin (2005) views social interactions as happening only at the micro level, namely between human bodies in a specific given context. Social values and/or culture can as a result only emerge from these local interactions, and keep changing all the time

within a process of coexisting sameness - reiteration and difference. In other words some things remain the same in the way people interact with each other, while others might change at the same time. According to Stacey and Griffin (2005) there are “no forces over and above individuals”, no blueprint, no higher global level with causal impact on the lower local one, and the ‘I’ and the ‘we’ are sides of the same coin.

Stacey clearly rejects systems thinking:

“The global is the imaginatively created unity we perceive in patterns of interaction across the populations we are members of – it is the generalization and the idealization as one phase of the social object. The local is the particularizing of the general and the functionalizing of the idealization on local interaction. However, these are phases of one social act and can never be separated. The general is only to be found in the experience of the particular – it has no existence outside of it. The idealization is only to be found in the experience of the particular – it too has no existence outside of it. [...] In short, the global and the local are paradoxical processes of generalizing and particularizing at the same time” (Stacey 2010, pp.166-167).

This view is contested by Foulkes, as explained in the next paragraph.

### ***Psychological theories and the social field***

I understand the concept of social field to be different in, for example, psychoanalytic literature. Foulkes (1975), dealing with group psychoanalysis, speaks for example of the ‘matrix’, which is in my view a systems thinking perspective. According to Foulkes a group is not just a collection of several individual unconsciousnesses, but has a common unconscious, revealing itself in the ‘matrix’. Foulkes speaks of ‘resonance’ as if individuals in a group are connected to each other by a web of mental processes joining them and passing through them. This web then creates the social fabric with which each individual resonates, attuned at an individual specific level but in accordance with the group’s shared themes.

I see some parallels between Foulkes's concepts of 'matrix' and 'resonance' and Heron's concept of "Unified Affective Field" (1999), whereby people in a group can connect at the level of feelings. For Heron "There is one universal experiential multispace, the presence of a cosmic consciousness interpenetrating, upholding and including physical space. [...] There is in reality no gap, no barrier between the intermediate experiential space of individual personal presences, nor between them and the experiential multispace of cosmic presence" (Heron, 1999, p. 231). I want to note here the clear difference between Foulkes's and Heron's notions of resonance and Stacey's concept of resonance (Stacey, 2001): for the latter, resonance is part of the bodily (unconscious) experience where I 'resonate' with the physical vibrations of someone else's body.

I am intrigued by Foulkes's and Heron's concepts of resonance because they correspond to my own experience of audio action learning as well as online conferences. An example of this is the occasion when I and other participants found ourselves taken by a strong common sense of convergence towards the person sharing her issue in an audio action learning session, and a strong emotional field of helplessness and despair developed, linked not only with the person herself but also with the theme that she was sharing and the group as a whole (Caulat, 2004).

Weinberg (2006) builds on Foulkes' concept of 'matrix' and develops the concept of 'social unconscious' on the internet. Weinberg doesn't think of groups as social systems with a brain, rather he considers that "In the same manner that unconscious forces drive an individual without knowing it, a group, an organization or the entire society can act upon unconscious forces too" (Idem, 2006, p.96). He continues by claiming: "[...] the Social Unconscious is the co-constructed shared unconscious of members of a certain social system such as a community, society, nation or culture. It includes shared anxieties, fantasies, defences, myths, and memories" (Idem, 2006, p.99). Based on my experience of working virtually with groups I believe that this concept of social unconscious is relevant. Actually my experience has been that the virtual space amplifies the dynamics in a group, including shared anxieties, fantasies, etc, and makes them more 'visible', almost impossible to escape. For example I have worked with teams in face-to-face showing some dysfunctions, and when we worked virtually these became so obvious that the team had to address them. By working virtually the team was actually enabled to grow and move on. We had a similar experience during the virtual workshop that I facilitated with my ADOC peers (see Sections 3.5.5 and

5.1.3) and the group felt that we had moved as a group and developed more coherence between us as a result.

### ***Social constructionism and the social field***

The social constructionist view claims that meaning is constantly created among ourselves and that we have no choice but to create meaning, which requires making choices together (Gergen, 1999). Moreover it claims that meaning can only be created in relationships: as individuals we are profoundly and solely social beings existing always and only in relationship with our world and with others.

Shotter (1993b) distinguishes 'knowing that' and 'knowing how' from a third kind of knowing. He refers to this as "knowing from within" or "joint action". The first two kinds of knowing relate to the prescription of theories and causal succession, that is, 'words already spoken'. The third kind of knowing has to do with emergence, that is, 'words in their speaking'. In other terms, according to Shotter an essential part of knowing can only happen through the process of verbalising ideas which are then shaped in their meaning in contact with others as they listen and respond to these verbalised ideas. The language is not seen any longer as a means to *represent* reality (a reality that exists out there), it is seen as *shaping* reality (because reality and we as human beings are intimately interwoven). Our knowledge of the world depends on interactions between people, and the language becomes a process of sense-making between people. This has important implications, namely that according to Shotter there is no such thing as 'inner thought': "[...] our thoughts, our self-consciously known thoughts, are not first organized at the inner center of our being (in a nonmaterial 'soul', or a physiological 'lingua mentis') [...]. They only become organized, in a moment-by-moment, back-and-forth, formative or developmental process at the boundaries of our being" (Idem, 1993, p.46).

In the light of social constructionism, the social field becomes crucial and central when it comes to leadership: in particular, what will be the consequences of these views when it comes to leading virtually? I will come back to this in the next section and explore the concept of the "Manager as a Practical Author" from Shotter (1993). At this point I want to note that the way Shotter describes a manager corresponds more to my understanding of a leader (see Section 2.1). My intention here is not to dispute the choice of words but more to continue to guide my readers through my paper.

A further interesting view of the social field is the way Gergen describes the global internet-based world. When it comes to understanding what Gergen calls 'postmodern culture' (1999), namely a global world where the internet prevails, he offers an intriguing perspective on 'the social' for my research:

“As we move into postmodernism, we find the body and the technology merging. The body and technology unite in various ways to generate new potentials. [...] The internet brings instantaneous relationship to an exponentially increasing population throughout the globe. [...] The internet seems a gateway into a domain without obvious end. The metaphor of the person as computer now seems limited and parochial. We can now more easily see ourselves as participants in a process of relationship that stretches toward infinity. Internet experience is like a wired womb, a constant reminder of how I am realized within a systemic swim, a process that eclipses me but which is also constituted by my participation” (1999, p.216).

I am curious about Gergen's metaphor of the 'wired womb' to describe the internet experience, and I see some similarity with Foulkes's concept of 'matrix' within a systemic tradition of thinking. Above all I am also excited by the idea of exponentially increasing relationships into which each of us as human beings can enter, and the power these exponential relationships might have on our learning and sense of being, maybe exponentially uncovering different aspects of our being as individuals and of the human race as a whole?!

### **2.2.3 Leadership**

In this paper I have used the concept of virtual leadership frequently in connection with the one of virtual connectivity. One reason for this, as mentioned above, is that I make the assumption that leadership cannot happen without being connected to and in relationships with others. The starting point for my research is summarised in Cunliffe's proposition about Management: "Management is not just something one does, but is more crucially, who one is and how we relate to others" (2009, p.11). Here again I need to point out that Cunliffe's definition of management seems to encompass also what I would frame as leadership (see Section 2.1). Cunliffe's words echo Grint's claim (2005) that leadership is necessarily relational and that the identity of a leader is essentially relational and not individual.

The same is true for Shotter (1993) who, as mentioned above, sees managers as 'practical authors': managers are not about applying management theories, they are about formulating and creating conditions within which they offer 'intelligible formulations' (Shotter 1993, p.148) of issues or happenings that first appear to others as chaotic and complex. In so doing they become 'authors' of realities and enable others to act on them. I find this an exciting view of leadership and followership and have been wondering how this 'authoring' would look in the virtual space, as it might be even more relevant there than in traditional leadership contexts because of the lack of points of reference, hence the increased degree of complexity. I will come back to this point with the example of William in Chapter 5.

Instead of going further down the road of 'authoring' at this stage I would like to stop and situate my research in the wider field of leadership research, as I think that it will be important for me to compare and contrast and to specify what I am finding out about virtual leadership. Having said this I must admit that this task has felt to me almost like an ironic destiny of combining a quasi vacuum (in terms of virtual leadership, see Section 2.1) with an inflated monster (in terms of leadership literature).

I am not stating anything new by noticing that the research on leadership has been at the same time massive and massively frustrating. After a review of the leadership literature, Stogdill (1974, p. 259) concludes that "there are almost as many definitions of leadership as there are persons who have attempted to define the concept". Yukl (1989) notices that researchers tend to define leadership according to their individual perspective and research into it according to their main line of interest. He underlines that numerous empirical studies have been conducted, and notes that the results are often contradictory and inconclusive.

Over the years leadership has been defined in several phases with a shifting focus. Bryman (1997) summarises four phases: the trait approach, the style approach (linked to leadership behaviours), the contingency approach (linked to situational factors at the centre of leadership, eg situational leadership), and the so-called 'new leadership' approach encompassing aspects such as transformational leadership, charismatic leadership and visionary leadership. According to Bryman (1997, pp.279-280), in parallel with the 'new leadership' wave (starting in the '80s and depicting 'leaders as managers of meaning'), during the '80s and '90s there has also been the so-called 'dispersed leadership' wave. These different notions of

leadership co-exist alongside each other. One example of this is Katzenbach and Smith (1993) presenting the team leader as an enabler of leaders and a facilitator (dispersing leadership through the team) as opposed to the leader as a shaper of organisational culture (Schein, 1985, p.317).

Very popular in the UK is the so-called action-centred leadership model first developed by John Adair in 1973, advocating that successful leaders address needs at three different levels: the task, the team and the individual. Adair does not focus on leadership traits, but more on the competencies required to work well with changing parameters and to adapt one's activities, for example based on the specific needs of the team and/or the individual. In my view there is an important aspect missing in this model and I will elaborate on this in Section 6.1.

From my work with several organisations I know that Kotter has had a strong impact on my clients and their thinking about leadership. Kotter (2001) makes the distinction between leading and managing. Leading, according to him, is about developing a vision, setting the direction and inspiring people to change, whereas managing is about putting processes in place, monitoring performances and resources, 'aligning people'. Kotter's vision of leadership and management is informed by a mechanistic understanding of organisations where causality prevails and command and control is possible.

This concept of leadership is in clear contrast with Stacey's (1992). Based on his view of organisations as complex responsive processes of interaction, Stacey challenges the concept of command and control in leadership. Since the future is unpredictable, an organisation-wide 'shared vision' is impossible to formulate; such a vision, according to Stacey, is an illusion or interpretation made with hindsight. He sees the traditional team concepts and the notion of empowerment as inherently powerful tools of manipulation as opposed to relying on the inner strength that comes from self-organisation; he argues for the notion of self-organisation as an emergent pattern of interaction. Yukl (1989) defends a similar position, namely that the concept of leadership might in the end be almost an oxymoron in the context of global complexity where causality is hardly possible to conceive. He mentions several authors who argue that leaders are seeking to create the impression that they are in control of organisations rather than actually leading. I see here a strong similarity with Stacey's thinking. However Yukl argues that an accurate

conceptualisation of leadership lies between the two extreme views of the heroic leader and the impotent figurehead.

Similarly to Stacey, Griffin (2002) also rejects the systemic view of leadership in which leaders would act as autonomous individuals who can both stand inside and outside an organisation and/or culture, and change it autonomously. He proposes the notion of leaders participating in the social process of interaction in local situations: "Leaders emerge in the interaction between people as an act of recognition. Effective leaders tend to be those who have, in the course of their lives, developed more spontaneity and ability to deal with the on-going purpose and task of interaction. Leaders are individuals who have enhanced capacities for taking the attitudes of the other members of the group. They enhance communication within and between groups. Leaders act and leadership is action." (Griffin, 2002, p.213).

Lawler (2005) takes an existentialist stance to define leadership. Like Shotter, Grint and Cunliffe, he rejects what it identifies as the 'objectivist' way of defining leadership and underlines the relational aspect. According to Lawler it is wrong to look for the 'essence' of leadership as "human existence precedes human essence" and there is no pre-determined human nature (Lawler, 2005, p.217). He underlines an interesting paradox: on the one hand leadership is the means of dealing with chaos, but on the other hand "management thinking is characterized as the search for certainty, as a means of dealing with complexity" (Lawler, 2005, p.227). "The absurdity here lies in searching using an objectivist system to identify the components of leadership, which is inherently a chaotic, arrational (sic), emotional phenomenon. Less traditional, more subjective and interpretive approaches create the potential to provide new insights into leadership and leadership relationships." (Lawler, 2005, p.227)

Even this small tour of the leadership literature shows the complexity and almost disparity of the landscape. Grint claims: "Despite over half a century of research into leadership, we appear to be no nearer a consensus as to its basic meaning" (2005, p.14) and he adds that the longer we look into the topic of leadership the more complex the picture appears to be.

Gill (2006) takes a different stance. He develops a comprehensive overview of the major leadership theories and concludes that they are all partial and represent



pieces of a jigsaw, which still remain to be put together. He therefore attempts to integrate them into a new model that he describes as an integrative, holistic model of leadership. I find this attempt useful at some level as it gives a good overview of the research landscape, and at the same time questionable as Gill attempts to integrate views that one could argue cannot be integrated because informed by different perspectives.

Alvesson takes an alternative stance and is highly critical of the attempt to define leadership too tightly. With Yukl he recognises that “The numerous definitions of leadership that have been proposed appear to have little else in common than involving an influence (sic) process.” He claims: “However, I think that a common definition of leadership is not practically possible, would not be very helpful if it was, does not hit the target and may also obstruct new ideas and interesting ways of thinking.” (Alvesson, 1996, p.458). Grint (2005, p.1) completely agrees with this and claims: “The quest for a consensus [about a definition of leadership] is both forlorn and unnecessary”.

Further authors such as Stogdill (1950) and Bryman (1997) also mention an understanding of leadership as a process of influencing.

I see in the latter views (Alvesson’s, Stogdill’s, etc) firstly a minimal common ground regarding the influencing aspect in leadership, giving me some justification for my working definition in this thesis mentioned in Chapter 1, p.3: “I will inquire primarily into virtual leadership, which means into the phenomenon of intentional influencing by one person of other members of a group or organisation (whereby this person might change over time) in an organisational environment ,where interaction happens predominantly through computer-mediated and phone communication”. Secondly I see in the latter views an encouragement to explore and diverge regarding leadership instead of the need to converge to a limiting consensus.

During my research I have kept all these propositions and provocations in mind for two reasons. When I started my research in 2006, as mentioned before, none of the research on virtual working was focused on virtual leadership. Hence I started my inquiry from my own construction and hypothesis that leadership is needed in virtual environments just as it is in face-to-face environments in corporate contexts. In the meantime I am no longer the only person to claim this. In addition, precisely due to the virtual nature of the contexts I was to research it might be that the

concept of leadership needs radical rethinking. This provocation led me several times back to the question: why am I researching into virtual leadership and not into 'virtual team work' or 'virtual working', as most other researchers have done so far? My intention in so doing was not necessarily to impose a specific concept of leadership onto the virtual corporate world, but rather to offer an alternative, provocative frame from which I wanted to inquire into leading virtually in a way that would be different enough from the existing frame of virtual teams in order to let new meanings emerge.

Given the nature of my inquiry into virtual leadership I would not want to end my tour of the leadership literature without adding one more interesting view on leadership, more closely linked to the virtual and global aspect of it.

I am adding Wilber's concept of Integral Leadership (2001) to this overview because I believe that Wilber is giving a strong signal to leaders and researchers by bringing the aspect of spirituality into his perception of leadership. Wilber distinguishes between several stages of mental and spiritual development in individuals, teams, organisations, cultures and communities. He argues that the task of leaders and individuals in general is to learn to identify at which stage of mental and spiritual development each individual (or group of individuals) currently is, and to help them break the pattern and move on to the next stage through the appropriate intervention. I find this concept particularly relevant in the context of my research, since it places emphasis on the need for people to develop their awareness and consciousness in spiritual terms in order to be better able to connect virtually and globally. Ken Wilber's words below are convincing to me.

"Simply focussing on the global technological net misses a truly crucial feature: what levels of consciousness are moving through that net? What good is it if the entire globe is at moral stage I? That would merely spell global war. [...] - unless we put as much attention on the development of consciousness as on the development of material technology - we will simply extend the reach of our collective insanity (footnote in the text). This was the conclusion also reached by UNICEF [...], namely, that without interior development, healthy exterior development cannot be sustained." (Idem, 2001, p.130).

I will come back to this aspect of spirituality in leadership in Chapter 6 when making sense of my research findings.

Finally, returning to the initial challenge posed by Alvesson, Grint and Yukl about the ongoing difficulty of defining what leadership is, I would like to mention the recent work done by Ladkin (2010) who takes a phenomenological route to exploring leadership. Instead of attempting to define leadership and answering questions, Ladkin advocates a stance of 'living the questions' about leadership, and encourages us to research into the 'moments of leadership' rather than researching the traits of leaders. I will apply this thinking frequently throughout my inquiry (see Section 3.3).

At the end of this theoretical, non exhaustive discourse intentionally containing contrasting views, let me repeat that my aim has been to work within the emerging field of these provocations and contrasts, hoping that it would help me to discover new ways of thinking by 'walking on the epistemological edge' and at the intersections of each of the theories.

#### **2.2.4 Summary: the significance of my informing theories for my research**

I would like to summarise and exemplify how the theories that I have outlined above have affected my choices in terms of methods, interpretation of research outcomes and practice.

#### ***Gestalt and Phenomenology***

Gestalt theory and Phenomenology have played a critical role throughout my research in three ways: when designing my research approach, when making sense of my research outcomes, and when developing approaches to working with leaders in the virtual space. This is explicated in more detail below.

Like Yontef (1993), I see Gestalt theory and Phenomenology in close relationship, with the latter informing the former. A Gestalt approach is grounded in the phenomenological discipline of identifying direct and immediate experiences and reducing the bias introduced by prior learning and experience (Yontef, 1993). It invites us to notice and identify what we are actually perceiving and feeling in the

current situation, and to put aside or 'bracket' reminiscences from the past. This aspect has been critical for me, as it has encouraged me to be uncompromisingly assertive in my research approach, and to encourage my co-researchers to pay close and careful attention to their actual experience in the virtual space instead of comparing it too quickly with their experience from the face-to-face environment. A typical example is when I invited a MilkCo manager from my MilkCo inquiry, one of my inquiry strands (see p.38), to closely explore how his feeling of trust towards a person he never met face-to-face was developing and strengthening, although he claimed from the outset that he would need to meet a person face-to-face first to be able to trust her/him (see Section 5.3.3.1, p.141). As I encouraged him to stay with his sensations and feelings and explore them, he was able to detach himself from his previous assumptions.

In Section 3.3 I explain why I have chosen a phenomenological perspective to make sense of my research outcomes, and how I have used this lens to do so. For example in Section 5.2.1 I describe how I used the Gestalt and phenomenological perspectives when making sense of the emerging findings from my MilkCo inquiry. Furthermore in Section 5.1.5 I focus on the concept of "Here and Now" in a Gestalt fashion and explore how Mark (one of the participants in the ADOC inquiry, another inquiry strand in my research, see p.38) could be engaged in the happening while being in several virtual spaces at the same time.

Gestalt has also played a key role in the approaches that I have developed (as a result of my research) to work with leaders and help them learn in the virtual space. For example the so-called 'focus exercise' is strongly informed by the Gestalt view that one needs to be completely aware of what is going on in a particular moment at the levels of mind, emotions and body (Clarkson and Mackewn, 1993). Based on my own research and practice of audio action learning, I soon came to the conclusion that it was absolutely critical to actively work with this awareness as a pre-condition of engaging well with others in the virtual space (Caulat, 2004). More details about the focus exercise and its practice are given on p.51 and Appendix 3. Finally in Section 5.1.3 I explore at length how the voice, so central in the view of Perls (1969), one of the founders of Gestalt, is essential to engage fast and at a deep and personal level with others in the virtual space.

## ***Social Constructionism***

Like Gestalt, Social Constructionism has played an essential role in my research, and at different levels:

- When designing my research approach
- When making sense of my research outcomes
- When deciding how to present my emerging knowledge.

Social Constructionism played a pivotal role when I was designing my research approach. For example in Section 3.1 I explain how I was aware of the impact that my question would have on my research outcomes, and how much care and consideration I took when choosing the construct of “Virtual Leadership” and weighing up the implications of this choice. Furthermore the way I crafted my inquiry questions, for example in the context of my MilkCo inquiry (see Section 3.5.4, p.48), was strongly informed by the awareness that words actively shape our perception of reality and the way we engage in it.

One example of how Social Constructionism, and in particular the concept of “practical authoring” from Shotter (1993), has helped me to make sense of my research has been when exploring William’s emerging virtual leadership. It soon became clear to me and my co-researcher that his use of music, pictures and symbolic gestures were powerful efforts to engage with his team members in the virtual space, by offering to them an interpretation of an unclear reality and helping them to make sense of it together with him and as a team (see Section 5.2.3).

Finally my choice to offer the emerging knowledge to leaders aiming to lead in the virtual space in the form of ‘propositions’ (see Chapters 5 and 6), as opposed to by means of models or frameworks, was specifically informed by the Social Constructionist principles. My aim in my research has not been to reach final results in the form of ‘knowing that’ or ‘knowing how’, but much more to offer words as “joint action” (Shotter, 1993b), as a way to engage with my readers-leaders and to help them to shape their reality in a “practical authoring” effort (Shotter, 1993b). Through my own attempt to practise ‘practical authoring’ I have not only endeavoured to **research** in a way that is informed by a Social Constructionist perspective congruent with the participatory paradigm within which I place Action Research (Lincoln and Guba, 2000, pp.163-188), but I have at the same time

strived to **lead** my leaders-readers into this unknown territory in ‘practical authoring’ fashion.

### ***Further psychological theories***

While Gestalt played a central role in my research and informed it at several levels, further psychological theories have also been helpful when making sense of my research outcomes.

In particular Foulkes’ (1975) and Weinberg’s (2006) theories of “matrix” mentioned above have proven to be helpful constructs when making sense of the way people relate to each other in the virtual space, for example when exploring how individuals were perceiving the way they were engaging and relating to each other in the context of the ADOC workshop (see p.38 with overview of the inquiry strands). In Sections 3.5.5. and 5.1.3 (pp.92-95 in particular, in the latter section) I explore how slowing down and listening at a deeper level enabled my ADOC peers to connect at a different level and to develop a different awareness of the group as a whole, which in turn helped the group to become aware of underlying tensions and move on.

### ***Leadership theories***

In Sections 5.2.5 and 6.1 I position my emerging findings in terms of virtual leadership in clear comparison and/or contrast with the leadership theories and perspectives mentioned in this chapter, with the intention to better identify what I perceive as unique aspects when it comes to leading virtually.

### **3. My research approach**

This chapter describes the approach that I have taken in my research in several dimensions. It accounts for the way I have chosen to frame the topic of my inquiry and the reasons for that, and shows how my inquiry question has changed over time. It also explains the choices that I had to make regarding my selected approach. Finally it gives a comprehensive overview of the different inquiry strands in my research with all the people involved as well as a summary of all chosen methods and how these fit together.

#### **3.1 Framing the theme of my research and choosing the ‘right’ words**

According to Alvesson (1996), the concept of leadership should not be defined in too specific a way (such as leadership traits, behaviours, style, etc...) but should be left more open as a generic topic with overlap onto the concepts of culture, strategy, etc. Therefore it seems advisable to remain open in the way I frame the theme of my research: “[...] it is also important to recognize that the linguistic ambiguity of broad concepts provide (sic) unifying symbolic functions for researchers [...] An open attitude to the subject matter, including considerations of alternative research vocabularies or lines of interpretation before, during or after the research process (Alvesson and Sköldbberg, forthcoming; Rorty, 1989), may benefit the intellectual inquiry” (1996, p.469).

As already mentioned, I have spent a fair amount of time reflecting on how much the very concept of virtual leadership serves me in my inquiry and how much it might get in the way, and wondering whether using a concept more conventionally understood, such as ‘virtual working’ or ‘leading virtual teams’, might be better.

In November 2006 I wrote in a paper for my ADOC peers and faculty:

“So far only a minority of virtual leaders admit publicly that they struggle and express their need for help. Further research in the area of virtual teams actually shows that less than 30% of virtual teams are seen to be effective and successful (Goodbody, 2005). My hypothesis is precisely that the reason why virtual working in teams remains so difficult is because the need for effective virtual leadership to develop has not been recognised so far:

leaders either think they should know how to lead virtual teams (as we learnt in our Ashridge Consulting research in 2005) and/or there is the common assumption that virtual teams don't need any leaders and should be self organised and managed (Tyran, Tyran and Shepherd, 2003)". (Caulat, 2006)

My thinking has not changed since then; however I have come to another realisation. With the label 'virtual leadership' I seem to be trying to name something that people haven't recognised as such yet. I notice that in most of my conversations people talk about virtual communication and/or virtual working but not about virtual leadership. This also corresponds with what I have found on examining the literature about virtual leadership. As mentioned, until 2007 almost all writing has a title more focused on virtual teams, virtual working, virtual communication. There is very little recognition of the need for leadership in the virtual arena, and even less for a virtual leader (Bell and Kozlowski, 2002). However, based on my personal experience and experimentation in cyberspace since 2003 I have developed a strong sense that virtual leadership is needed, and this is the reason I chose to frame the research the way I did.

Also in spite of what I mention above, I started noticing some interesting developments on the web from approximately 2007 onwards. Around the autumn of 2004, when the concept of virtual leadership imposed itself on my mind for the first time, I did a Google search. I got very few hits. By the end of 2007 things seemed to be changing rapidly: through the competitor analysis which I do on a regular basis in order to identify what competing (with Ashridge) organisations do in the area of virtual working, I found that more and more companies, in particular consulting companies, were using the term 'virtual leadership'. For example in 2008 Dr. Andre Martin, from the Centre for Creative Leadership, published a presentation on their website in which he shared the results of a survey with 247 senior executives around the world asking them to nominate ten leadership trends in business: the third trend that they identified was 'virtual leadership' ("The third trend identified in the survey was the increase in 'virtual leadership' in a globalised world, where leaders were required to bridge cultural, geographical and functional boundaries using technology.")<sup>5</sup>. Another company, Virtual Connection<sup>6</sup>, has developed a virtual leadership assessment model.

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<sup>5</sup> Seen again on 7 July 2010 on: <http://teacher.acer.edu.au/index.php> "Leadership – Leadership trends: How should we be preparing our leaders for the future?"



Within the context of my work with InterCo (one of my clients at Ashridge), my colleague Sally and I decided to conduct a series of preparatory interviews with the participants in the Virtual Leadership programme that we delivered in September 2007. After the interviews we were most struck by the following (extracts of my working notes in August 2007):

- “When we asked the participants to describe themselves as virtual leaders they found it very difficult to answer. Either they said hardly anything or they answered about themselves as leaders or they spoke about themselves as managing activities virtually (eg sending reports, commenting on results in a teleconference, informing others by phone). Some of them claimed to do up to 70% of their work in a virtual environment, but they would not consider their leadership in the virtual environment.
- “When I asked them about the moments when they felt at their best in the virtual environment, they usually gave me examples about management activities such as getting a performance report, convening a teleconference to share the financial data, etc.
- “Why is it that they don’t consider themselves as ‘influencing’ and/or leading in the virtual space although they clearly have the responsibility to lead a team, the members of which they see approx. 4 or 5 times a year? I am puzzled by this. It is as if they automatically link the fact of leading (eg working on relationships, motivating or what they call the ‘soft’ aspects) with face-to-face meetings.”

I had another interesting experience at the Client Event of Ashridge Consulting on 1<sup>st</sup> June 2007. Ten clients joined me for a vivid conversation on virtual leadership. Most of the attendees explained that they had to lead virtual teams and that this was the reason why they joined the conversation. They seemed to struggle less with the concept of virtual leadership and my question about their personal virtual leadership. At the end of the meeting five of them said that they found the conversation very helpful and that it had been the first time that they had had the opportunity to speak about and explore their virtual leadership. So they were not questioning the legitimacy

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<sup>6</sup> [www.virtualconnection.biz](http://www.virtualconnection.biz)

of the concept in itself, but they were acknowledging that this topic is not much addressed yet and how good they felt about having had the opportunity to talk about it.

I often found myself frustrated: on the one hand I sensed I had to stay open in the way I framed and explored my topic with others, on the other I was clear that virtual leadership needed to be recognised and developed as a topic in its own right. Moreover, I believed that if I didn't claim that space in an assertive and explicit way, it might not happen, and I felt that if I didn't claim upfront what my interest was about, I might have missed the purpose of my research and lost my motivation altogether. This tension has been representing a dilemma for me throughout this research.

### **3.2 Learning to work with my passion**

I already mentioned in Chapter 1 my own passion for the topic and for virtual connectivity in general. I have always felt the urge to challenge people who maintain that virtual working is 'second class'. This led me to some painful moments when I started my research. We would sit in our supervision group together. Like my peers, I would take my turn and report enthusiastically on what I had read and what I was planning to experiment with. To my bewilderment I noticed a strong reaction from two or three members of the group, who would talk about isolation, poorer connectivity, alienation, etc., and underline how biased I was regarding the topic of virtual working and virtual leadership. It took me a long time to figure out whether they were speaking from their personal experience, or from a view based on their reading. This experience was, ultimately, a healthy one, as it made me realise that reactions of my peers in the supervision group were likely to be echoing more generally held views regarding virtual working, and that it would be a mistake to underestimate these. One decisive moment for me came after a heated discussion about my topic in the supervision group, when one member took me aside and made the following remark: "Ghislaine you need to understand that your enthusiasm for the topic cuts across and questions years of tradition in the Organisational Development practice, where most of us have learnt about the importance of eye contact, body language, face-to-face interaction ... and this is pretty uncomfortable". I still remember the moment of silence that followed this statement and it felt like a cold shower: "Oh my God, this is what is happening... How will I ever find a way to engage with my colleagues and peers in a manner that enables them to connect with rather than reject what I am claiming?". With the

help of another peer who was more open toward my topic, I realised that I needed to change my stance, quieten my enthusiasm, at least when engaging with peers, and find ways of writing that would bring them alongside me, for instance by regularly checking with them how they felt and what they thought. Thus for a while, I would put direct questions to them in my papers, inviting them to reflect for themselves. A significant shift occurred when I took the opportunity to facilitate a virtual workshop with them (one of the student-led workshops mentioned in Introduction) and inquired into their experience afterwards. I will come back to this pivotal moment of my research later on (in Chapter 5). But all these difficult moments in my supervision group actually had a critical impact on the way I took my research forward. I became even more convinced that I absolutely needed to embark on a second person inquiry stream (Torbert, 2001) in order to put my enthusiasm into perspective and to really inquire from the perspective of others, and I began to remind myself regularly that my enthusiastic curiosity and search for the promised land was far from the norm. This helped me on several occasions, particularly when working with clients.

### **3.3 Combining an inflated area of research with no man's land**

As mentioned in Chapter 2, much is written about leadership with as many definitions as there are potential researchers. Likewise there is a considerable number of books (which I called previously 'recipe books') about virtual working and virtual teams; but there is hardly anything about the leadership aspects of virtual working. So throughout my research I felt I was constantly moving from a mega-city to no man's land.

While I agreed with Zhang and Fjermestad (2006) about the paucity of theoretical rigor in virtual leadership studies, I had some reservations about engaging in research that would narrow the outcomes too quickly to well known theoretical models about leadership (which is what both authors do and advocate that others should do). This reservation was motivated by two reasons: firstly, as mentioned, researchers can't seem to agree on what leadership is about, so how would I go about choosing one or a number of frameworks for my research. Secondly, my biggest concern was that, by reducing my questions and approach to fit within the current thinking developed from within a predominantly face-to-face paradigm, I might be doing something incongruent with the very topic of my research about virtual leadership, and might close a door to new emerging learning before having

even tried to go through it. Therefore I engaged in a quest to interpret my findings through robust theoretical thinking about leadership while remaining open and true to my topic. I was inspired by the phenomenological perspective described by Ladkin (2010). I would like to summarise below the key reasons why I found this perspective helpful in the context of what I was trying to achieve:

- 1) Phenomenology encourages us to look at leadership as a phenomenon (and not for example as the personal traits of a leader or as a fixed process) and to consider this phenomenon in close connection with the context in which it develops.
- 2) Attending to the particular circumstances in which virtual leadership arises, as opposed to an abstract theoretical framework - or even worse, one informed by a face-to-face paradigm of thought - seems to me to be absolutely critical in order to do justice to a different and virtual space in which leadership might emerge.
- 3) The stance of 'living the questions' advocated by Ladkin as opposed to searching for answers and definitions appears to me to be fully congruent with the Action Research methodology that I have chosen for this work. In practical terms this means that in my research I have been putting the emphasis on exploring and describing real live examples of what it takes to lead virtually, and that I have dedicated considerable effort to reflecting on these, instead of urging myself to come to conclusions. In other words I have chosen to start and work from real life examples from the world of real virtual leaders, and to hold myself in the process of making sense for an extended period of time, as opposed to starting from some hypotheses that I would have sought to verify in practice.
- 4) I feel particularly attracted by the concept of 'moments' of leadership. Ladkin emphasises that this is not a time-related concept, but a concept encouraging us to look at leadership as a phenomenon fully dependent on other phenomena, such as the organisation in which it happens, the people working together, the intention of the researcher (ie in the service of what does s/he do the research on leadership in question: To help the academic world? To help leaders improve their effectiveness? etc.): "[...] leadership cannot exist apart from the particular individuals who are engaged and

involved in any leadership dynamic. Leadership does not exist without people who are in some way identified as 'leaders' or people who are identified as people who they will lead. Neither can it exist outside of a particular community or organizational culture or history. For these reasons I argue that rather than being a 'whole', leadership can best be described as a 'moment' of social relations. What does this imply about how we might come to understand leadership? Recognizing leadership as a 'moment' suggests that we can never arrive at the reality of leadership as separated from those particular contexts in which it arises." (Ladkin, 2010, p.26).

I am fully aware of the weight of this last sentence in terms of the implications that it might have for my research. As I have chosen to define the validity of my research (see Chapter 4) primarily by its usefulness (how useful is my research going to be for the leaders for whom I am writing it?), this will mean that what I can aspire to is the description and reflection of lived and concrete 'moments' of virtual leadership with real leaders in the real world, combined with intense reflection and 'living the question' of what it takes to lead virtually. What I cannot (and don't want to) aspire to is the delivery of a new leadership model at the end. Having said that, my aim has been to select a wide and diversified range of leadership 'moments' in different contexts and with different people in the hope that my leaders-readers will be able to identify themselves with some aspects of these. Furthermore, although I have decided to remain open for as long as possible in my research, I have also been able to identify common patterns across my inquiry strands with strong implications for virtual leadership. I anticipate (and hope) that these might serve as useful guidance for virtual leaders in their own leadership 'moments'.

### **3.4 Remaining open and living the questions for as long as possible**

In the same way that I resisted fitting the unknown into well established leadership models, I also resisted converging too soon the emerging results from my different inquiry strands. This has presented a big and ongoing challenge for me because it meant that I needed to give up the hope of applying a 'proper' inquiry cycle, building on the outcomes from each strand on a regular basis and enriching my research across the strands. Very soon this intent proved to be inadequate, because in my effort to remain open and deal with what was emerging I was confronted by a series

of aspects that were pretty much diverging across the inquiry strands with few common aspects. It would have been impossible to integrate the findings across the strands without violating the natural flow of learning that was slowly happening in each of them, all at their own pace and in their specific context.

While from a rational perspective I was struggling with this emerging chaos, where everything was going its own way and certainly not according to the inquiry process that I had planned, my intuition was telling me that things were needing time to appear and develop some clarity. Also in retrospect I realise that I personally very much needed the time, the meandering and the space to reach a much deeper level of understanding of my topic with my co-inquirers. Furthermore from a phenomenological perspective it is critical to consider the emerging insights about leadership from *within* the context in which they arise (see Ladkin, 2010, as explained in Section 3.3).

*In the following graph I am offering an overview of the various inquiry strands on which I have been working over time. My aim has been to stay for an extended period with each strand of inquiry. In order to do so, I developed the discipline of writing about each of them separately and ended up producing discrete pieces of writing. This writing allowed me to enter a further cycle of inquiry within each strand in an effort to prevent myself from rushing too soon into interpretation and integration.*

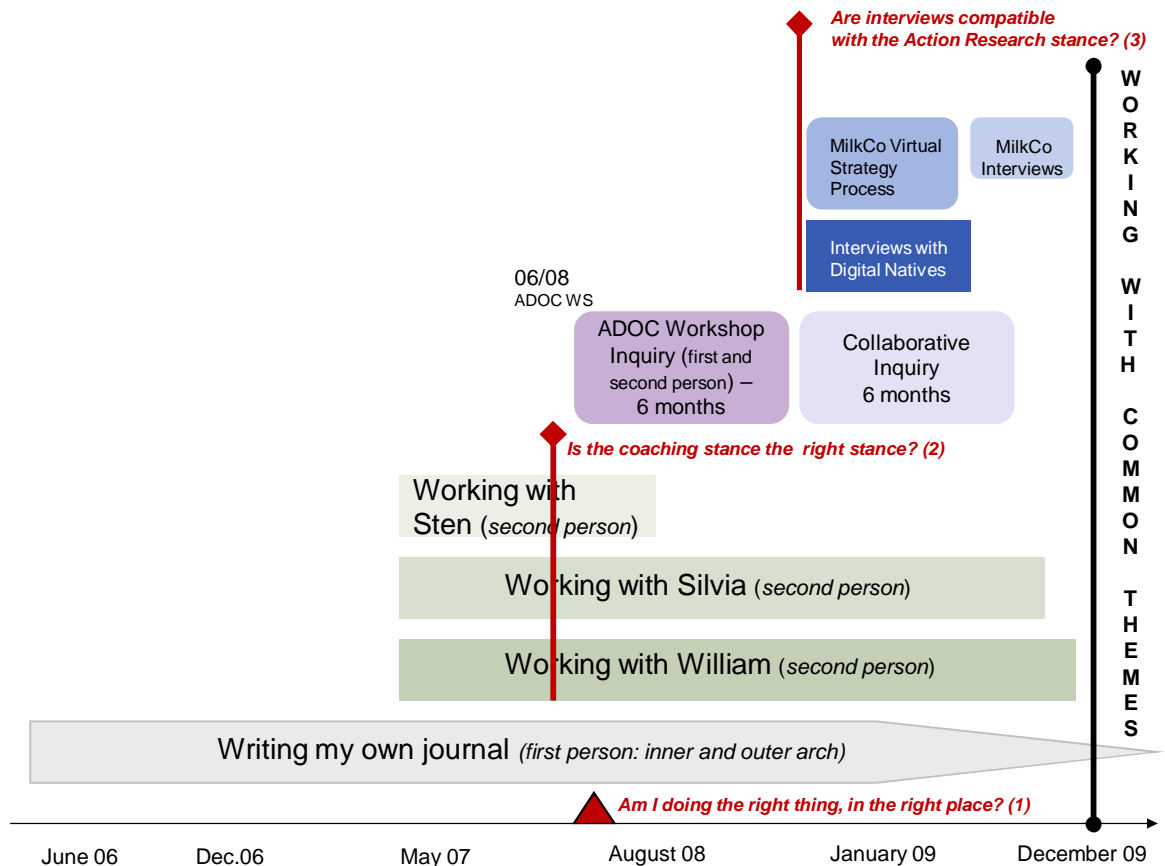


Figure 1: Overview of inquiry strands with key decision points

Decision point (1): see Sections 3.1 and 3.2.

Decision point (2): see Section 4.3

Decision point (3): see Section 4.4.

### 3.5 My inquiry strands

I will now comment on each inquiry strand described on Figure 1. As indicated above, I will comment in detail on the decision points respectively in Chapters 3 and 4. The learning from each inquiry strand will be presented in a combined way, based on key emerging themes across the strands, in Chapter 5.

#### 3.5.1 Writing my own journal

Writing within the participatory paradigm of Action Research made it necessary for me to inquire also from the first person perspective (Torbert, 2001), as I considered myself to be an integrative part of what I was inquiring into, and I needed the time to

reflect on what was happening to me as much as to my research and its participants (I have already demonstrated some of this in Section 3.2). Journaling was to me the most obvious method. It was a practice that I had maintained during AMOC and which served me well, so I was keen to carry on with it. In the context of this first person inquiry I paid careful attention to balancing the inner arch of attention with the outer arch (Marshall, 2001). While I would often sit down and write my own impressions and reflections after an encounter or an important conversation or event (inner arch), I would also whenever possible seek feedback from others regarding my way of thinking about my research or, even more importantly, my way of leading virtually (outer arch).

### **3.5.2 Working with William, Silvia and Sten**

(In order to protect the confidentiality of my co-researchers I have changed their names and that of their company.)

William is a Belgian manager at a senior level of CompCorp. He has been leading teams (approximately 1,500 people in total) over six plants in Belgium and Sweden in a blend of face-to-face and virtual work for the last three years. I got to know William in 2006 during a leadership development programme which Ashridge Consulting was running. I soon developed a strong respect for William, in particular for his attitude, which I felt was open, thoughtful and engaging. During the time that I worked with him, William had to overcome extremely challenging situations in terms of management and leadership, and the need for him to lead virtually became ever more critical.

Sten is British and works for a multinational process engineering company. At the time of my research Sten was in charge of a particular market segment in the Nordic and Baltic countries and the UK, and he was responsible for a virtual team including five direct reports based in different countries and another seven indirect reports in other countries. He was based in the UK while his boss was based in Finland. I had known Sten for at least ten years. I got to know him when I was working at RolloCorp and we did a lot of work together. Sten and I got on well and, as with William, I have always appreciated his openness. My work with Sten stopped earlier than that with William and Silvia for the reason that in July 2008 Sten changed his role to local Sales Director, still within the same organisation.



Silvia represents a different case. I have never met her face-to-face. I only got to know her within the context of my research. She was recommended by a friend and immediately agreed to participate in the research. Silvia is German and works in Sweden for a global telecommunication company: she leads a team across the world (Japan, China, Korea, US, Brazil, Mexico, Hungary and Sweden). Silvia's team is a typical matrix based team, which means that she has no direct reports. At the time I started working with Silvia the team had met face-to-face only twice since 2005.

I had carefully contracted about the work that we would do together; I had a briefing and contracting session with each of the leaders upfront, based on a document that I had written specifically for the purpose of this work with them and had sent to them prior to the session (see Appendix 1).

With Sten I had a total of four conversations of approximately two hours each, two of which were face-to-face, as he happened to be at Ashridge. The conversations were taped. I also took notes, reflected on each conversation and brought my own insights from the conversation to the next one to check with Sten's as an ongoing cycle of inquiry. I also followed up on the actions that he decided to take and heard from him what he learnt from that.

With Silvia and William I had an average of one conversation every three months, with a total of nine conversations of between two to three hours each. The amount of time that they were able to dedicate to me, as well as the activities that we ended up undertaking together, did not always correspond to what we had originally set out to do, the main reason being their availability in terms of time. All conversations were on the phone. As with Sten, I followed up on the actions that they had planned to take and helped them summarise their learning; I engaged in an ongoing inquiry, checking my insights with them and asking them for their insights and any new questions emerging from the process.

### **3.5.3 Collaborative inquiry with Matthew, Barbara and Silvia**

While I found my research with the three leaders I was accompanying between 2007 and 2009 very rich, at times I felt that the exchanges on a one-to-one basis, where my co-researcher and I were trying to make sense of what was happening, could benefit from a wider circle of people to reflect with. Hence I decided to initiate a collaborative inquiry in addition to the other strands of inquiry. Between January

and July 2009 I organised and facilitated a collaborative inquiry with three virtual leaders, all based in different organisations. This proved to be a very rewarding and rich experience as well.

The people engaged in the inquiry were (here again all names used are fictional to protect my inquirers' anonymity):

- Matthew, who was working globally as an accounting director for a pharmaceutical company
- Barbara, the CEO of an NGO working across geographical zones such as India, Africa and the UK
- Silvia, who was mentioned earlier as one of the leaders I had been accompanying over the last two years on a one-to-one basis.

None of the three inquirers knew each other before our work together and they did not meet face-to-face during the process. As mentioned, I never met Silvia face-to-face but I had been working with her for over a year and a half when we started the inquiry. I had met Matthew in the context of a Global Leadership programme that I ran for his organisation a few years before, and I met Barbara in the context of some consulting work that I happened to do for her organisation seven years earlier. In order to create an environment in which all of us would feel comfortable and safe I had paid a lot of attention to bringing people together whose organisations were not competing with each other and who had practised the art of leading virtually for some while. One thing that I had not planned for nor designed into the process, but which soon turned out to be a strong common denominator for all three inquirers, was that they all had to lead virtually teams or members of teams based in India.

In terms of methodology, I was keen to use a collaborative inquiry approach. At that stage I was aware that I would not want to embark upon a so-called 'co-operative inquiry' in the strict terms as described by Heron (1988), but that I was striving nevertheless for a real partnership in research with equal voices. I actually find Heron's definition of a co-operative inquiry really helpful in the sense that it served me as an orientation for what my inquiry should and should not be:

"A co-operative inquiry usually starts off with one or more initiating researchers who choose an area of inquiry, co-opt a number of interested persons to become co-researchers, and then initiate them into the research method. If real initiation has taken place the co-opted inquirers internalize

issues to do with both the area and the method of inquiry. They will make the whole enterprise their own in a vigorous way. If the initiation is more apparent than real, then the co-opted inquirers are merely yes-people, being guided and shepherded into appropriate behaviour, without any real grasp of what they are about. They are just followers of the initiating researchers. Any agreement reached is likely to be spurious. Collaboration is inauthentic. The co-opted inquirers simply rubber-stamp what the initiating researchers get up to” (Heron 1988, p.55).

While the topic of the inquiry had been given by myself and represented the basis of my invitation (Heron would advocate that the topic also needs to be agreed collaboratively) I was keen that the research question was one formulated by the group, and that the method and the research process were also decided with the group.

As a matter of fact we had to practise and exercise our collaborative-ness immediately, in the first session. When I suggested the research question and invited my co-researchers to react to it, I experienced the first push back. The question that I was suggesting was: “What does it take to lead virtually effectively and what roles do presence, trust and power play in it?”.

My three co-researchers and I then went into some lengthy and careful considerations and I could feel in their comments the uneasiness of Matthew, Barbara and Silvia with the suggested question:

- “Trust, power, presence: these are things that you do to lay the groundwork”
- “I keep getting lost in the connection. Do these three aspects take us away from the key question: what does it take to lead virtually effectively?”
- “Are these attributes really the right ones? These attributes are leading - and potentially misleading - the answer to the question”
- “What am I doing today that enables me to lead effectively virtually is the question that I want to work on! I don’t want any substitute”
- “It is important that we leave the question more open”.

The quotes above showed in my view a clear wish from my co-researchers to keep the question open in the fear of limiting our curiosity and our understanding too much. At that stage I could feel a lot of sympathy for their wish, as this

corresponded to my own wish to remain open in my question while I was struggling with some ADOC faculty's strong advice in urging me to focus on only one or two aspects of virtual leadership. In the end I agreed with my collaborative inquiry group to stick to the open question: "What does it take to lead virtually effectively?" I decided to trust my co-researchers against the advice of some ADOC faculty members, although I shared my decision with my supervisor and the peers in my supervision group.

The sessions we had were held over a period of seven months as represented in the following figure:

### Collaborative Inquiry Group: the process

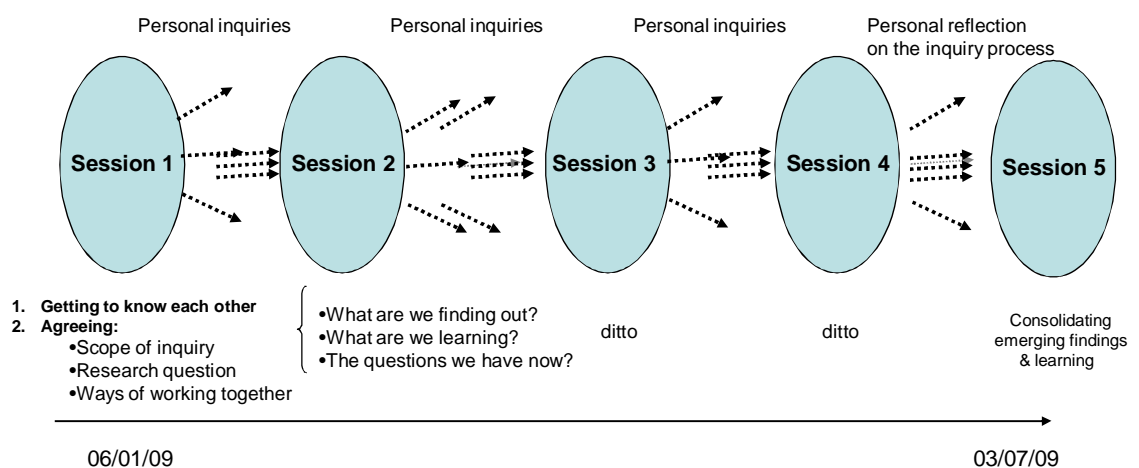


Figure 2: The process of our collaborative inquiry group

We also had some discussions related to how each of us wanted to go about inquiring into our virtual leadership. I had suggested some kind of collective discussion format during the session, and journaling activities in between the sessions, to reflect on our ongoing virtual leadership. Silvia said from the beginning that she was not keen on journaling, although Barbara was. Matthew seemed unclear as to the way he wanted to reflect in between the sessions (our virtual meetings). Also during the sessions we ended up at times using a format of

exploration that is rather similar to an action learning format, while at other times we would end up having an open dialogue about the specific aspects that we were discussing. I noticed that I was not attached to any specific format of exchange and reflection, and therefore let the conversations emerge. I would then invite the group at the end of each session to check whether the format we had chosen was helpful for our learning and/or whether we should amend it for the next session. The only element to which I was personally attached was to explore not only our respective virtual leadership but also our experience of virtual leadership in the very group that we were forming, and my co-researchers agreed to this.

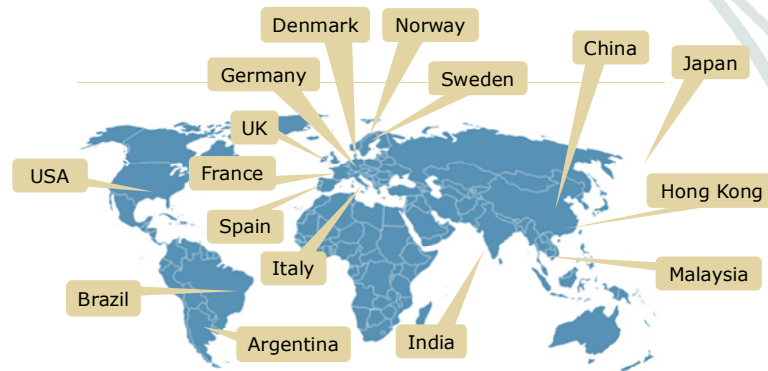
A final point regarding the method was that I agreed with my co-researchers that we would record our sessions, which we held on a web-based platform, WebEx (see a screen print of the platform in Appendix 2), and that I would send the recording after each session to everybody.

#### **3.5.4 The MilkCo inquiry**

Between September 2008 and January 2009 two Ashridge colleagues and I had the opportunity to work on an exciting virtual project with a Scandinavian company, MilkCo, in the chemistry industry (the name of the company is fictitious and several parameters have been modified to ensure anonymity). The three of us knew MilkCo pretty well because we had worked with the organisation before, in the context of a development programme. In that programme we had also included some audio/virtual action learning work in between modules and this work was well received by the participants. In September 2008 my colleague Peter (client director for MilkCo, disguised identity) came to me and explained the client's request: they wanted to work on one of the most critical strategic questions for the organisation and to involve their top management worldwide; in addition they had only a very limited time to do so (four months). My immediate reaction was to suggest a virtual process. As my colleague Peter had always been very open and supportive of the virtual approach it didn't take me long to convince him. Together we designed a virtual approach that was presented to the client, who immediately accepted it. The work that I will now describe in the text as a 'virtual strategy process' involved 48 MilkCo top executives from around the world (including Korea, India, China, Malaysia, Argentina, Brazil, the US and Europe) as well as several members of the Board, including the CEO who took an active part in the final virtual conference

involving a total of 55 people. The sponsor of the project was a member of the Board and took an important and active part in the process.

### Participants' location



**48 people working across the globe and across all functions in the organisation**

*Figure 3: MilkCo participants' locations*

The work started with a two-day workshop face-to-face at Ashridge during which the managers were introduced to the initiative, the rationale behind it and its purpose. They were also exposed to some external provocation linked to the strategic question on which they had to work: several leaders from other organisations as well as a few academics came to present on a specific aspect linked to the strategic challenge in question. At the end of the workshop the MilkCo executives were organised into five project teams which would work on different yet interrelated aspects. Each team had five or six participants and was coached by one of three of us from Ashridge. Peter coached one team, Lee, another colleague (disguised identity), coached two teams, and I also coached two teams. From then on all work was done virtually, using a web-based platform (WebEx – see screen print in Appendix 2) as well as teleconferences.

## Virtual Strategy Process for MilkCo

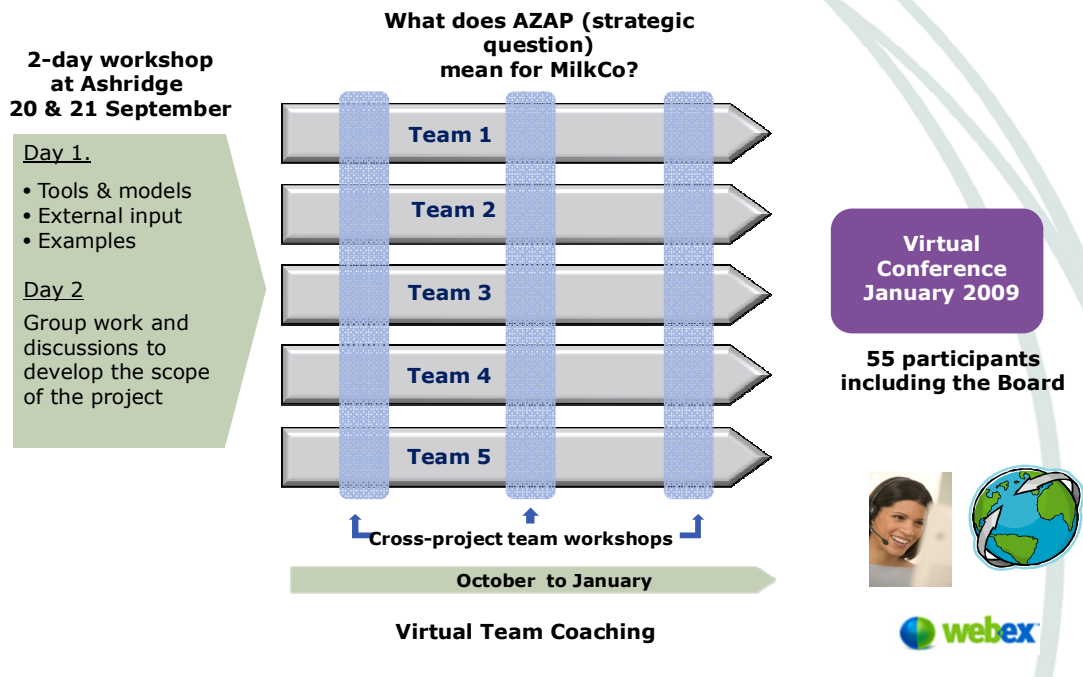


Figure 4: Overview of the MilkCo process

My Ashridge colleagues and I coached the teams during five of their virtual meetings on WebEx. We had paid a lot of attention to the way we would position and deliver the coaching. Our aim was to support the team to deliver best performance within a very short amount of time (four months): this would include helping the team with the actual content of their project where appropriate and needed; it would also principally include helping them to develop effective ways of working together as a team virtually. We discussed thoroughly what this might involve and agreed that a minimum would be that at the start of each virtual meeting the coach would work with the team to enable them to connect well at a relationship level before jumping to the task. The substance of this was a detailed check-in followed by a focus exercise led by the coach (I will explain on page 51 what a focus exercise is and why it is important. An example of a focus exercise as well as a short description of the history of this approach can be found in Appendix 3). After that the team would be left to their own devices to do the work in the way that they wanted. The coach would solely observe virtually. Sometimes, if so contracted with the team, the coach might interrupt the process and ask a question to help them to become aware of what was going on at a process level. Only at the end of the meeting would the coach take the facilitation back and enable the team to reflect on what they had

achieved, how they felt they had worked together, and what their learning had been. The coach would offer some feedback, raise questions and give advice when appropriate based on what s/he had observed.

My colleagues and I came together virtually on a regular basis and reflected on how our respective team(s) were doing, how the overall process was going, how our role was helping, etc. We also regularly challenged ourselves as to our contribution: as we had not done this type of work virtually before, we were genuinely concerned to add value and give helpful support to teams who were working under high pressure in a virtual space. So we kept checking with each other as to what coaching in the virtual space meant and whether we were serving our client's needs the best we could.

In addition we planned three cross-project team workshops into the process; one representative from each team would attend these workshops to present the current status of work within their team and to discuss with his/her counterparts possible overlaps and/or synergies between the teams, as well as the emerging questions regarding the strategic initiative (see Figure 4). I facilitated these workshops with Lee and Peter. The project sponsor of MilkCo took an active and very helpful part in guiding and supporting the teams. At the end of the process (after four months of intense work) all teams came together with seven members of the Board of MilkCo and other MilkCo employees, discussed the outcomes of the project work and made decisions about the implementation of the outcomes based on an analysis of implications and prioritisation. All this took place in a virtual conference which I facilitated with my two colleagues.

As I felt that the whole virtual process had been a very intense and rewarding experience for all parties involved - not only was the client very satisfied with the process and its outcomes, but the Ashridge team felt happy about it too - in agreement with the MilkCo project sponsor and my colleague Peter, I embarked on a series of interviews with the participants. I wanted to explore their experience in more depth and inquire with them into what they felt and thought it took for a leader to lead virtually, based on their experience of this virtual strategy process.

Between May and August 2009 I had twenty one-to-one phone interviews of a duration varying between 45 and 75 minutes each. My interviewees had been invited from across the teams and had accepted the interview on a voluntary basis.



I had invited 21 people and 20 accepted the invitation spontaneously. I believe that they were representative of the whole group because they all belonged to different teams and had very different cultural and functional backgrounds. I chose not to tape the interviews but to take notes of what I was hearing and to check my understanding in the course of the conversation. I had also assured my interviewees that their contributions would be anonymised, in the sense that the reader could not attribute their examples and opinions to any person in particular. I also positioned these interviews as a 'give and take' in the sense that I was making it clear to all that while their contribution was an excellent opportunity for me to learn in the context of my research, I would also summarise the outcomes of the conversations in the form of a report which I would offer to MilkCo, in the spirit of helping the executives to further consolidate their learning in the organisation about leading virtually.

As to the questions that I asked, I checked these carefully with my supervision group beforehand. Most of my questions were open and clearly linked to the concrete experience of the interviewees within the context of the 'virtual strategy process'. I was keen to focus on the experience of leading and/or being led virtually and on the specific 'moments of leadership' (Ladkin, 2010). I also took great care upfront with each interviewee to make sure that they understood that I was not seeking any feedback regarding how Ashridge did in this process, nor would my questions lead to right or wrong answers, but that I was genuinely and only interested in their personal experience of this virtual process.

The questions that I ended up asking are below; however, as I was keen to have a free flowing conversation to really understand what was most important in the eyes of my interviewees, I only used these questions as prompts and introduced them if the conversation came to a standstill:

- What was your experience of the virtual strategy process?
- Describe moments in the overall process and in your team in particular when you thought that you were making good progress, that things were moving forward? What was contributing to this?
- Describe moments in the overall process and in your team when you felt stuck, when you felt that things were not moving in the right direction? What was getting in the way?

- If you were to describe the leadership that you experienced in the overall process and in your team in particular, what would you say? How would you qualify it? How was it similar to/different from what you have known so far?
- What about your personal leadership in the process: how would you qualify it? When did you feel particularly leader-full? When was 'following' working for you? Please describe those moments that struck you most.
- If you were to give some advice to a friend about to engage, in a leadership role, in a major global virtual project, what advice would you give him/her?

If by that stage the interviewee hadn't said anything about 'trust' or 'power', then I would ask the following questions as well:

- How much trust did you feel in the team? What kind of trust did you experience? What was contributing to its development? What was getting in the way?
- What about power? What aspects of power (if any) did you experience? What made *your* power in this virtual space?

The reason I asked these questions to the MilkCo leaders was that, in spite of not wanting to focus too much on these topics, I wanted to keep an eye on them as a result of my discussion with ADOC faculty (see 3.6).

At the end of the series of interviews I went into a laborious phase of reading through the notes of each interview, colour coding the key aspects, grouping these and identifying the key emerging themes. I wrote about each theme and produced a paper dedicated to this strand of inquiry which I then shared with my supervisor.

### **3.5.5 ADOC workshop and the subsequent inquiry**

In the context of the ADOC programme, as previously explained, all participants were asked to facilitate a workshop in their field of research. For me this represented an excellent opportunity to inquire into my topic with people keen to explore and reflect. Based on my previous experiences with clients, where the vast majority were at first rather sceptical, in some cases even negative, as to how much one can achieve in the virtual space, and then became more open and positive after they had their first experience of a virtual event in a group, I decided to put the emphasis on experiential learning in the first instance. My original wish was to hold the two days (planned for each workshop) virtually as I was keen to provide an

experience that was congruent with the topic of my research; however I quickly noticed that my suggestion didn't generate any enthusiasm. In the end the group agreed to a compromise: the first day would happen virtually and the second would take place in the traditional ADOC fashion, face-to-face. Given this compromise, I felt even more determined to design an event that would focus on experiential learning on the first day (people would learn and know about virtual working and virtual connections through their experience of it, followed by some reflection), and to put the emphasis more on the 'propositional knowing' (Heron, 1999, pp.117-128) on the second day. At that point I would share with them my emerging hypotheses (my propositions) based on my research findings so far. In other words I was keen to test with my peers my emerging findings in the light of what they would experience with me in the virtual space.

I decided to design a process of engagement that would take into account all the things I had learnt with my clients so far:

- In the virtual space events are less constrained by time boundaries, as interactions can happen asynchronously, hence I decided to pay particular attention to how much and which information I was going to send to my peers, and by when, to help them prepare for the experience
- In the virtual space, rules of engagement can be different, and ought to be so in order to ensure best possible connectivity. It is important to contract with the participants beforehand and to agree these rules with them - hence I contacted my peers before the workshop for a 'briefing and contracting' conversation, during which I explained to them what would happen and the key contents of the virtual workshop. I also checked the starting time with them and whether they were willing to agree to some specific ways of proceeding, such as doing a 'focus exercise'. I will come back to the 'focus exercise' later on in this section. I also agree with them on a minimum of hygiene factors that I believe are critical to ensure good virtual connectivity<sup>7</sup>
- Particularly with participants who have little experience of virtual working, it is important that the technology is as simple as possible and as complicated as necessary at the same time. If in the first five minutes of joining, participants

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<sup>7</sup> Hygiene factors include the requirement that everybody is alone and in a quiet place with no background noise, properly equipped with a headset and a good quality phone line.

experience difficulties with the technology and cannot log in, for example, their acceptance of this way of working and their willingness to openly experiment decreases in an exponential way with every second of struggle. Hence I asked one of my colleagues to contact the participants one by one and have a test run with them, to check that the technology worked on their computer and to give them a first contact with the platform that we were going to use, namely WebEx. In Appendix 2 you can find a screen print representing a virtual session on WebEx, as well as some further details about how this platform works.

I would like to explain the 'focus exercise' here in some detail. In the context of my AMOC research into audio action learning (2003-2004) the several experiments that I did with clients led me to realise the importance of being well aware of one's body and bodily sensations when doing virtual work. The reason for this is to avoid projecting one's own feelings and emotions onto others in the virtual space, and/or the psychological phenomenon of 'confluence' where one gets into a kind of symbiosis with somebody, making it impossible to distinguish between the two worlds (my world and the world of the other) any longer. In order to help my clients to be as grounded as possible and enter into a 'healthy' connection with others in the virtual space, I developed a so-called focus exercise. The exercise consists of a guided journey through one's body to explore all bodily sensations. It lasts between eight and ten minutes and can be compared to meditational practice, where bodily awareness is the prime objective. As a practitioner, it is important for me to contract with my clients beforehand that we will do this exercise and to help them understand why, in order to avoid any uneasy feeling of esotericism, particularly for people not used to this kind of practice.

The workshop turned out to be a rich, intense and emotional event; not only the first day, which happened virtually, but also the second day in the traditional face-to-face setting at Ashridge. Several peers mentioned afterwards that this workshop had contributed towards helping the group to move to another level of awareness about itself and to find a language to speak about itself that it hadn't used before. The workshop also generated several highly interesting questions related to the way people generally connect and engage with each other; the virtual experience had provided a platform from which my peers and I could look into our usual ways of connecting through a different lens, maybe even with a fresh eye.

After the workshop I had several one-to-one conversations with peers who were willing to reflect with me on the workshop, and who confirmed the significance of the event for our group. I was keen to write a paper and to offer it to my peers as a way to further engage in the inquiry; in other words I wanted to go into a second loop of inquiry with my peers. There were two reasons for this plan. Firstly, I thought that this would help us, and me certainly, to further process the learning emerging from the workshop. Secondly, it would allow me to test out some of my emerging propositions in the field of virtual leadership. As mentioned, my original plan was to test these during the second day of the workshop; however the first day generated a lot of insights and emotions about the ADOC group, so that on the second day I and my peers decided to continue the reflection about the ADOC group itself. The reflection was so intense and emotional that I felt it was inappropriate to come up with my propositions, as I clearly sensed that this was not what the group needed at that time. Hence the second loop of inquiry gave me the opportunity to catch up with an important step that was still outstanding. In terms of my research overall I saw this step partly as a second person inquiry (Torbert, 2001), since the sense we were making was in the end **our** sense of the event, and partly as an outer arch of first person inquiry (Marshall, 2001), since I was planning to explore my own leadership during the event and how it was perceived by others.

In order to help the reader understand my inquiry process around the workshop I have represented the different inquiry loops in the following figure:

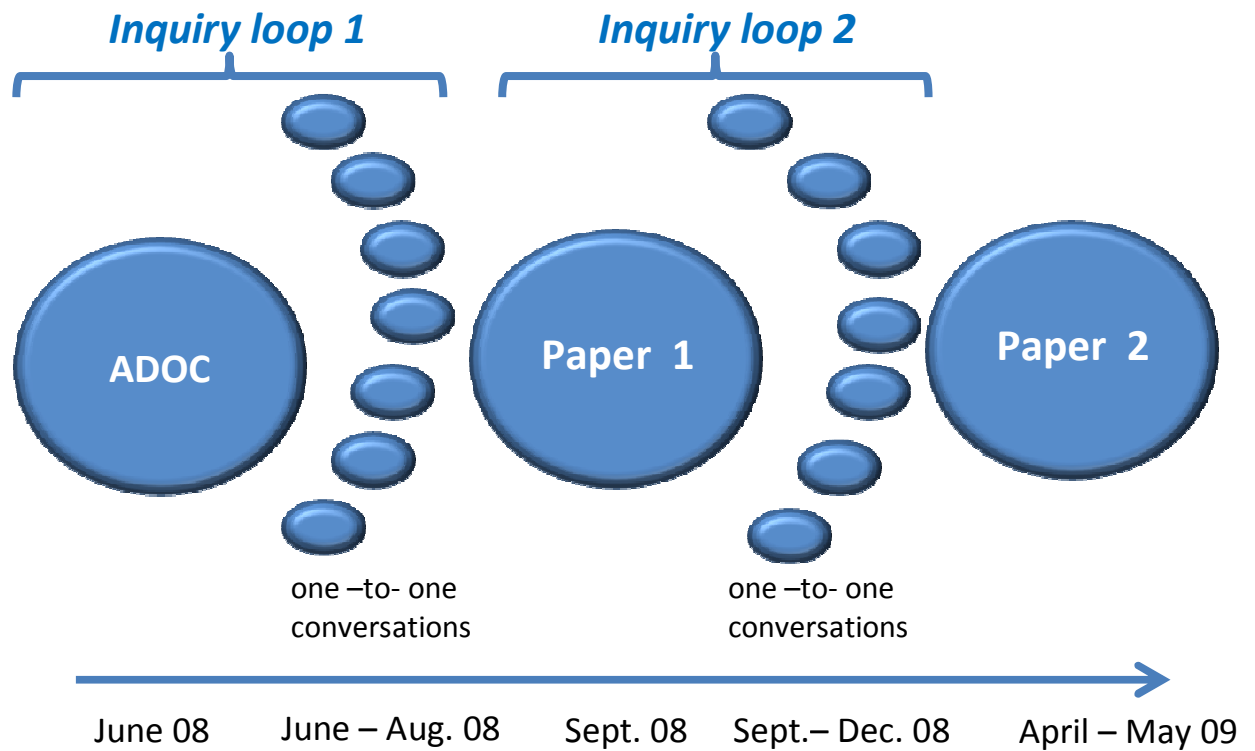


Figure 5: Inquiry loops regarding the ADOC workshop

*Note on Figure 5: 'Paper 2' corresponds to the discrete piece of writing that I did in April and May 2009 specifically dedicated to the ADOC workshop, in the same way as I wrote a paper related to the MilkCo experience. 'Paper 1' was the piece of writing that I did in September 2008 in which I undertook some sense making of the workshop (based on the preceding one-to-one conversations) and then sent it to my ADOC peers as an invitation to engage with me in a second loop of inquiry.*

### ***The relevance of the ADOC workshop for my research***

This workshop had given me the opportunity to inquire into the details of our interactions between peers and faculty in the virtual environment. It was a privileged opportunity to “take our experience seriously” (Stacey and Griffin, 2005) with people striving for good inquiry work. I also believe that the ADOC community can to some extent be taken as a microcosm of organisations with all the organising patterns implied, hence I hope that the emerging learning is not only relevant for my ADOC peers, faculty and myself but also for other leaders-readers.

Based on my research so far I think that I can claim that this workshop has given me the opportunity to start inquiring into virtual leadership at the micro and/or local level of personal relationships and interactions in a way that has not been done before.

Panteli (2008) echoes these patterns in the research about virtual working: "It follows that to view virtuality as being merely a global phenomenon provides us with only a partial understanding of its impact and pervasiveness. Virtuality is also a local phenomenon that needs to be examined from a micro-level analysis as well as a macro-level analysis." (Panteli, 2008, p.2). She underlines that virtual interactions are still realised in the particular setting of individuals, which influences the way virtual systems are used and managed.

Hine explains how people have used extreme examples of the internet, and sees this as unhelpful; instead she also pleads for a real effort to understand local phenomena of the internet: "To date, far more effort has been expended on predicting the revolutionary futures of the Internet than has been put into finding out in detail how it is being used and the ways in which it is being incorporated into people's daily lives." (Hine, 2000, p.2).

I believe that the micro-level analysis is what I have been trying to achieve here in this strand of inquiry, from within a participatory Action Research paradigm (which is not the research paradigm taken in either Panteli's or Hine's books).

### **3.5.6 The 'digital natives'**

In the context of my inquiry I have several times come to reflect on the questions: Why do so many people reject or dislike virtual working? Why do they struggle with it? Is it because it is inherently incompatible with human nature, or is it only a question of time and people will get used to it and adopt this new way of working and communicating as they adopted the use of a car or a microwave decades ago? Are we just talking here about patterns of adopting a new technology? How many times, for example, have I been at a train station and observed young people around me standing in a small circle, and instead of talking to each other they are frantically busy sending SMS to other friends? How many times have I heard from friends that they are worried about their son or daughter who spends hours in front of the computer either playing games in cyberspace or communicating with friends on Facebook?

Whether we like it or not, whether we are sceptical or not, some of us are currently spending a substantial amount of time in virtual waters and we particularly need to acknowledge that the younger generation has been growing up in a world where virtual spaces such as Second Life or Facebook have become a natural part of their lives, in the same way that television became a natural part of our parents' and/or our generation's. Rymaszewski et al (2007) have called this new generation the 'digital natives': what may be considered by us as virtual global weird stuff represents to them a normal activity.

All these considerations led me to think that maybe the next generation, being already used to virtual communication, will not be facing the same doubt or struggle as their parents when it comes to working virtually with others. So maybe my question about what makes effective virtual leadership (and implicitly why it seems to be so difficult) is only relevant for certain generations. Agreeing with Hine (2000) that much effort has been spent in theorising on the potential impact of internet on people's lives instead of actually analysing and researching into how people currently use it (2000, p.147), I was therefore keen to move beyond what I was observing and hearing. I decided to do some research with young people to better understand how they currently use virtual ways of communication and how they are with others virtually, how they currently look at their professional future and what role virtual communication would play in this, hoping that this would give me further insights regarding the topic of virtual leadership.

### ***My interviewees***

I tried to speak with a fairly wide range of people who would not be too engaged already in their professional careers, and at the same time who would be old and mature enough to have some experience of communicating virtually and have the willingness to reflect about it.

My interviewees were an international mix of cultures and genders, although there was a majority of female interviewees.



I performed the following interviews:

- A one-to-one conversation with Marion early in October 2008, an Anglo-French lady (22 years old) living in the UK who had just finished studying geography and started a job with an international company.
- A teleconference with Juliet and Katherine in October 2008, both 18 years old, British girls who had just finished school with excellent A level results in the summer and were about to start their studies, in chemistry (for Juliet) and veterinary surgery (for Katherine).
- A teleconference with Priscila, Pamela, Diego and Erika in December 2008. All four are Brazilians. Priscila (27 years old) lives in Barcelona, has completed her studies of cinema and has just started work in the production of films. Pamela is 22 years old and is studying interpretation and translation of languages (Portuguese, English and German) in Heidelberg (Germany), Erika is 20 years old and studying biology in Brazil together with Diego, who is 21 years old.
- A teleconference with Maya, Elien and Sam in January 2009. All three are Belgian youngsters. Maya is 16 years old and attends High School; she is learning Greek and Latin and loves music; she plays the guitar and sings in several choirs. Elien is a friend of Maya, also 16 years old and at the same school as Maya. She is learning modern languages (Dutch, French, English and German) and is also a musician. Sam is a 17 year old boy who is studying informatics, knows a lot about computer communication technologies and plays several music instruments. When we had the teleconference it was the first time that Elien talked to Sam as they had not known each other before.

Although none of the interviewees apart from Juliet knew me face-to-face, all phone conversations ended up being spontaneous, open and very enjoyable. I was actually pleasantly surprised by how fast my interviewees seemed to connect with me and I with them, and in how much depth we managed at times to discuss some aspects. Actually one of the interviewees, Maya, noticed at the end of the teleconference with Sam, Elien and myself: "It is really surprising how fast you can have a detailed conversation with very personal views of people on a specific

subject, even when you have no idea about the rest of their lives”. It turned out that none of my interviewees were used to having phone conversations with more than one person and I was surprised by how naturally and fast they got on with it. At the end of the conversation with Maya, Elien and Sam I asked how they had experienced it, given that Sam didn’t know Elien before. The two of them said that they initially thought that it would be very weird and that they had concerns that the conversation would be boring and technical, and that they actually found that “As we started it all went great and it was very OK” as Elien put it.

As for the MilkCo inquiry stream and the ADOC workshop, I ended up writing a discrete paper as a result, which I shared with the ADOC faculty and my supervision group for some feedback.

### **3.6 The story of my research question**

As mentioned previously, my ongoing questioning of my method, the feedback that I got from the ADOC faculty and from my ADOC peers as well as from my collaborative inquiry group, and the choices that I made as a result, all had an impact on the way I have been framing my research question since 2006. In the table below I give an overview of the story of my research question in the spirit of helping my reader to understand my journey of inquiry and the choices I made along the way.

<b>Timing</b>	<b>Challenges from ADOC faculty and/or co-inquirers</b>	<b>My research question</b>
June 2006 to April 2008		<b>What is effective virtual leadership and how can I contribute to its development from a consulting perspective?</b>

<p>April 2008</p>	<p><b>ADOC faculty:</b></p> <ul style="list-style-type: none"> <li>• Need to narrow my scope and focus on selected specific aspects</li> <li>• Also invitation to work from a first person perspective only</li> </ul>	<p><b>What is effective virtual leadership and what role do presence, trust and power play in it?</b></p> <p><i>I decide to 'drop' the consulting aspect as a way to reduce the scope. I discuss with my supervisor how I can best get the focus required without limiting my inquiry too much. I decide <u>not to limit</u> my inquiry to a first person inquiry for the reasons mentioned in Section 3.2</i></p>
<p>January 2009</p>	<p><b>Collaborative inquiry group:</b></p> <ul style="list-style-type: none"> <li>• Reject the suggested question because they found it too limiting.</li> <li>• Want to focus on: What does it take to lead virtually effectively?</li> </ul>	<p><b>What does it take to lead virtually effectively?</b></p> <p><i>I decide to take the challenge of my collaborative inquiry group and discuss this with my supervision group. However I keep an eye open on the topics of trust and power.</i></p>
<p>July 2009</p>	<p><b>Feedback from Viva:</b> Need to focus on one specific aspect only in the spirit of getting more depth into my academic research. The focus could be, for example, trust in the virtual space or the audio in the virtual space. It should be either on facilitating or on leading.</p>	<p><b>What does it take to lead virtually effectively?</b></p> <p><i>I decide to stick with my question because I feel that this is how I can best help leaders / practitioners through my research if I want to stick to the validity criterion of usefulness.</i></p> <p><i>I discuss this with my supervisor and justify my choice in my post-viva paper. See Appendix 4.</i></p>

Table 1: The story of my research question

### 3.7 Bringing it all together

Having explained why and how I have sustained my inquiry and written about each strand separately over a long period, I would now like to write a few sentences describing how I went about looking across the different strands of inquiry and identifying common themes and questions.

The work that I undertook in December 2009 was simple and basic, albeit not easy: I read through all the discrete reports and made several notes in different colours of the aspects and questions that were emerging. I then decided on the best way of grouping them and reflected on the best way to frame the emerging themes and questions. Finally I discussed and explored the choice of my emerging themes with my supervisor.

Chapter 5 presents the themes and questions generated by my research.

### 3.8 Summary of methods used

In the previous sections of this chapter I mentioned a range of inquiry methods. In the table below I give a summary of these methods and explain how they fit together in the context of my Action Research based inquiry. Action Research is a “large umbrella” with a “myriad of approaches” (King, 2004, p. 25); one can see that the different methods that I have chosen are complimentary, and they are intended to provide richer and more comprehensive insights into my research question: “What it takes to lead virtually effectively”.

Inquiry Strands	Methods	Comments
My journal	1 <sup>st</sup> person inquiry, inner and outer arch (Torbert, 2001; Marshall 2001)	I consider myself to be an integrative part of my inquiry and I need to reflect on what is happening to me and my thinking as much as to my research and its participants (see Sections 3.2 and 3.5.1). Hence the 1 <sup>st</sup> person stance is essential. I find the differentiation ‘inner arch’ and ‘outer arch’ (Marshall, 2001) particularly helpful because it helps me to inquire into my own bias and construction of virtual leadership.

Working with William, Sten and Silvia	2 <sup>nd</sup> person inquiry (Torbert, 2001) in the form of coaching	As explained in Table 1 and in Section 3.2, I am keen to incorporate a 2 <sup>nd</sup> person inquiry as a way to learn to work with my own bias and to truly understand and inquire into what Virtual Leadership means to others. In Section 4.3 I explain at length how I have endeavoured to combine a coaching stance with a 2 <sup>nd</sup> person inquiry stance and to ensure quality of research.
Working with Barbara, Matthew and Silvia	Collaborative Inquiry (Reason and Bradbury, 2001) This collaborative inquiry took the form of a dialogue and also at times the form of action learning (see footnote 3, p.13). I believe that action learning, precisely because of its focus on learning through reflection with peers on the action taken, is fully compatible with the Action Research methodology.	In the same endeavour to learn to work with my own bias and to truly understand and inquire into what Virtual Leadership means to others, I decided to add a collaborative inquiry stream to my research as a way to widen the circle of my co-researchers and at the same time to intensify the research by bringing several people together, as opposed to practising 2 <sup>nd</sup> person inquiry on a one-to-one basis.
ADOC workshop	Combination of 1st person (inner and outer arch) and 2nd person inquiry – see above. Several phases of 2nd person inquiry: inquiry in the whole group in the form of a facilitated collective reflection and inquiry on a one-to-one basis (see Figure 5, p. 53)	The same arguments as the ones mentioned above apply here.
MilkCo inquiry	Interviews	In Section 4.4 I explain why I consider interviews to be compatible with the Action Research methodology. As mentioned in Section 2.2.4, I have crafted my interview process and my questions in a way that is strongly informed by the Social Constructionism theory, i.e. I performed these interviews based on open questions aiming to enable me to engage with my co-researchers in a dialogue, as opposed to performing an analysis of their answers. This in turn is compatible with the participatory paradigm within which I situate

		Action Research (Lincoln and Guba, 2000, p.163-188).
Digital Natives	Interviews	In Section 4.4 I explain how I applied the participatory principles of Action Research and how I endeavoured to do research <b>with</b> the youngsters as opposed to <b>on</b> them, even if I was not really one of them given my age and my practice - obviously different from theirs.

*Table 2: Summary of methods used*

## 4. My efforts to ensure the quality of my research

In this chapter my aim is to demonstrate how I have ensured quality in my research work. I first explore the whole debate around quality of research (including concepts of validity, usefulness, etc) in order to situate my understanding of good quality for my specific research. I then provide some concrete examples of how I have attempted to ensure quality.

### 4.1 General considerations

As I undertake my research in this post modern era, and in the field of social sciences, it feels really important to consider how I can ensure its quality and validity. I pay particular attention to the way I craft this statement because I am aware of the ongoing debate about whether the question of validity in social sciences is per se a valid one (Kvale, 1995). While I don't intend to join the debate, I believe that I need at least to position my research within it.

Before I do this however, I would like to be explicit about how I situate my research in a wider philosophical and epistemological context. As mentioned in Chapter 1, I have been conducting this research as Action Research from within a participatory paradigm (Lincoln and Guba, 2000, pp.163-188).

The underlying ontology for this research includes the following assumptions:

- There is a reality independent of human sense making, “a primeval givenness (sic) of being (of which we partake) and [...] as soon as we attempt to articulate this we enter a world of human language and cultural expression” (Reason and Bradbury, 2001, p.7)
- We are not separate from our world, but we participate in it and ‘co-create’ it in the context of our relationships (Reason and Bradbury, 2001).

In terms of epistemology, this means that ‘knowing’ depends to a large extent on ‘acting’, as I co-create the reality of my world by articulating it in language with others.

According to Heron (1996) there are four interdependent ways of knowing: ‘experiential knowing’ (the direct encounter or experience of something or

somebody), 'presentational knowing' (the form in which I choose to represent what I have encountered, eg a picture, a piece of music, etc), 'propositional knowing' (the concepts, models that I develop as a result of my experience) and 'practical knowing', which results from the first three.

As mentioned in Section 2.2.2 Shotter (1993b) puts more emphasis on the act of co-creation through language, and speaks of a "knowing of a third kind": the knowledge that arises through a process of voicing one's experience and co-creating one's reality in relationships with others.

All this places the process of inquiry at the very core of my research and underlines the importance of language as the key shaper of the reality that I have been trying to represent or articulate with my co-inquirers. As researcher I make sense together with my co-inquirers of what is going on in a given context and of the implications for the subject matter inquired into.

I also agree with Lincoln (Lincoln and Guba 2000, pp.163-188) that whatever the paradigm in which research is undertaken, it is still imperative that audiences of research understand the grounds on which it was undertaken, the methods adopted to come to the findings, and the processes which are used to present the findings. I started describing these in the previous chapter and I will go into more detail in this chapter.

These considerations bring me back to my original question about the quality and/or validity of my research, which I now will examine in depth.

Some reputable academics (eg Reason, 2006) argue that talking about the validity of research in social sciences is an oxymoron, because it automatically establishes strong references back to a positivist approach to science. Others are willing to engage in the validity debate because they feel that it is a necessary step to progress the thinking on the worthiness of social sciences.

In this context I find the view of Lather (2001) helpful: she pleads for a discourse on validity not in terms of a normative discourse, but more as a discourse to 'dis-articulate' and disrupt the set of norms towards a more generative approach that will help to bridge the separation between what we consider science and what is not



seen as scientific endeavour. Heron (1996) also advocates the need to deal with validity as a central issue, even in the post-modern era of research.

Amidst this debate there seems to be a key theme emerging regarding the usefulness of one's research: one way of deciding whether research outcomes are valid or not should be to question first of all whether they are useful to practitioners in the relevant field. People such as McKernan (1996), Reason (2006), Marshall (2001) and Ladkin (2003) argue in this direction.

So how can I best position my work in all this?

## **4.2 The criterion of 'usefulness'**

I decide to start with my purpose for this research. As mentioned in Chapter 1, I want to put my research in the service of helping leaders to realise that they can achieve much more virtually than they originally thought they might. My aspiration is to offer leaders something which they can identify with, understand, be inspired by, and use directly for their work in the context of their virtual leading.

In this context I find Ladkin's view very helpful: "Perhaps ultimately the final arbiter of validity is usefulness. For those engaged in action and reflection cycles to the betterment of a situation whether they intend to 'write up' their 'results' or not, whether an action or method is improving things has to be the 'lived' test of validity" (2003, p.540).

McKernan (1996) supports Ladkin's views, stating clearly that theories cannot be validated independently of practice but that, on the contrary, they can only be validated through practice.

Reason and Marshall (1987, p.112) advocate that "all good research is for me, for us and for them". I will now apply these usefulness questions to my research as follows:

### ***Useful for me:***

My research in virtual leadership has been so far extremely useful for me. I am testing the usefulness of my research in the assessment of whether the application of my learning helps me to be a more effective virtual leader,

and a more effective consultant in helping virtual leaders to develop. My clients' feedback tells me that. From the work that I have done so far I already regularly obtain encouraging feedback from clients about how helpful my work with them has been. I have also received positive feedback on several occasions from colleagues with whom I was working in a virtual team where I had responsibility for the project.

***Useful for us:***

An important element of my research is the second person inquiry into virtual leadership. For example, I have been accompanying and working with three virtual leaders since 2007 and have been exploring their emerging virtual leadership with them. I also conducted a collaborative inquiry with a group of three virtual leaders between January and June 2009. I believe that the research has been useful for them and me (for us) as we have managed to generate understanding and learning that is helping in our daily practice. I heard regularly from my co-researchers how much they appreciated our reflection together as a privileged space where they generated useful learning which they could apply immediately (examples of this can be found in Sections 5.1.6, 5.3.1 and 5.3.2).

***Useful for them:***

I assume that my research will be 'good for them' if it manages to produce ideas and outcomes that can speak to the other virtual leaders or leaders-to-be out there, in the sense that they can recognise themselves in the reflections and insights that I am offering, and that this recognition is compelling enough for them to be willing to experiment with the ideas and approaches emerging from my research. When promoting our Ashridge Consulting offer on virtual leadership I had a sense of what this might look like through the comments of the clients I was speaking to. They were saying things such as "This is really true! I recognise this a lot" or "I find your article<sup>8</sup> about virtual leadership very interesting. It casts an interesting light on some of the challenges that I am experiencing". I received an email from one of the leading global energy companies with the following words that filled me with sheer happiness:

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<sup>8</sup> Caulat, G 2006b "Virtual Leadership" in 360<sup>0</sup>, The Ashridge Journal, pp.6-11.

“In looking for relevant pre-read, your article on virtual leadership has struck a chord with myself, my team and the leader I work for. Not just for its clarity and relevance, but also for the simple and practical models that it positions. I have found it very easy to develop those in a team reflection exercise to drive heightened awareness and encourage cross-team learning. Virtual leadership is a topic we are passionate about and we wondered whether we could start a conversation with yourself on the topic” (19<sup>th</sup> April 2009).

However, the criterion of ‘usefulness’ might sound much simpler than it actually is. How can I in the first place lead people to recognise that what I am uncovering through my research might be useful to them? The findings might be practical, hence easy to apply, but if the reader does not recognise him/herself in these results, or doesn’t understand how I came to the results, they might not recognise their usefulness, particularly in the field of virtuality which for many is so charged with negativity, fears or anxiety because of previous bad experiences.

### **4.3 Quality of craftsmanship**

I find Kvale’s (1995) categories of validity - ‘quality of craftsmanship’, ‘communicative validity’ and ‘pragmatic validity’ - very helpful. I want to emphasise that Kvale does not associate ‘validity’ with the positivist paradigm, as he defines it in a very specific manner within these three categories. I will now consider these in reverse order. By ‘pragmatic validity’ Kvale means the verification through actions of the knowledge claim: “Pragmatic validation is verification in the literal sense, ‘to make true’ – the effectiveness of our knowledge belief is demonstrated by the effectiveness of our action. Knowledge in action rather than observation.” (Kvale, 1989, p.86). I see in this a strong similarity with the concept of usefulness described by Donna Ladkin and others. I believe that what I have mentioned above (eg the feedback of my co-researchers or the example of emails received from readers) already exemplifies the ‘pragmatic validity’ of my research.

With the concept of ‘communicative validity’ Kvale underlines the necessity to probe the validity of one’s claim through dialogue with others: “Valid knowledge is not merely obtained by approximations to a given social reality, but also involves a conversation about the social reality; what is a valid observation is decided through the argumentation of the participants in a discourse.” (Idem, 1989, p.83). I believe, particularly in the context of a second person inquiry (Torbert, 2001), that the art of

communicative validity is critical as researcher and co-researchers make sense together of the emerging learning, and this happens often in the context of a dialogue where several views are explored. For example in the context of my collaborative inquiry with my three co-researchers in virtual leadership, I needed to test in a gradual and emerging way whether trust and power were indeed playing a role in leading effectively virtually. When I first shared this concept, or 'propositional knowing' (Heron, 1996), with them they rejected it (see table in Section 3.6). Only through their own experience and subsequent reflection were they willing to consider the importance of trust and power, and even then only on their own terms within the context of a dialogue among the four of us (I will give more details on this in Section 5.3.1). Another example can be found in Section 5.1.1 when I explain the time and effort it took for my co-researcher Sten and me to develop some shared understanding of what 'virtual leadership' might mean.

Finally the concept validity as 'quality of craftsmanship' seems to me to be central:

"Validation comes to depend on the quality of craftsmanship in an investigation, which includes continually checking, questioning, and theoretically interpreting the findings. In a craftsmanship approach to validation, the emphasis is moved from inspection at the end of the production line to quality control throughout the stages of knowledge production" (Kvale, 1995, p. 27).

During all my research I felt that I was struggling with the question: am I doing my research in the right way? I knew that the question in itself was the echo of a positivist paradigm - as if there is only one way, the right way, to do research - and my supervisor regularly reminded me of this and challenged me on it. Nevertheless the concern as to what I would like to call the 'quality of my craftsmanship' has always been at the forefront of my mind. In the paragraphs below I would like to give some examples of this.

In February 2008 I was somewhat frustrated with my work with the three leaders whom I had been accompanying in their efforts to lead virtually. I wrote in one of my papers for my supervision group between January and April 2008 about an interesting dilemma that I had regarding my role as a coach (as opposed to expert) and the power dynamics that I had to deal with:

### **“Emerging methodology questions for my second person inquiry**

“In February 2008, ten months after having started the inquiry with leaders, I find myself facing a difficult question in terms of methodology, linked with the nature of the engagement that I have invited my co-researchers into. I have offered to William, Sten and Silvia the opportunity to actively participate in my research as an opportunity to learn together with me about virtual leadership, and about their own virtual leadership in particular. In my briefing paper (see Appendix 1) I even mentioned that one of the benefits for them would be free coaching. One of the consequences has been that while exploring some aspects of their virtual leadership challenges there is the tendency on the part of my co-researchers to ask me whether what they say is ‘right’ or ‘wrong’. Whereas I keep emphasising that I don’t have the right answer, I also feel that I need to share what I am finding out so far and what other virtual leaders are sharing with me. While I have put a lot of effort into not framing myself as the expert, I feel that my co-researchers would like to see me as such. On the other hand I feel that it would not be right, either, for me not to share what I am discovering: these people have accepted my invitation because they assume that they will gain some benefits out of this research for themselves, and they assume that I know more than them about the topic of virtual leadership. By ‘more than them’ I mean that I have more theoretical knowledge and I take more time than them to think about the topic. However in terms of practical knowledge of leading virtually, I feel that I have some experience but certainly not more than they have.

“Therefore I consider it appropriate for them to expect that I will coach them and for me to accept this framing, as long as I work from a real shared inquiry perspective. I might be the one offering the questions, as well as sharing some views and experience of working with other leaders on the topic of virtual leadership, but this should not be seen as being of greater authority than the nature of the experience and the reflection that each of my specific co-researcher is having at a given moment.

“Nevertheless from a methodology point of view this raises the question whether a second person inquiry can be done from within a frame of coaching. How can I ensure the quality of the research while at the same time attending to the co-researchers’ needs? I could argue that since my

co-researchers are keen to find out about virtual leadership and about themselves as virtual leaders (they have been selected based on this criterion), and the purpose of my research is “to inquire primarily into virtual leadership”, there is a strong overlap of purpose and interest. So my co-researchers and I share the same goal, therefore we should be able to serve each other’s needs. I guess at this stage that the key challenge is how we will inquire together and how we will maintain the discipline of a shared purpose with equal voices (Heron, 1988).

“Given the frustration that I mentioned at the beginning of this paper and the thinking I am sharing here, I believe that I am at the right point to revisit my approach to the research with my co-researchers. Through my coaching work I keep coming to the conclusion that my co-researchers don’t know what they don’t know, as, for different reasons, their experiments with their own virtual leadership have been limited so far. Rather than only asking specific questions alongside open questions, as I was thinking in September last year (I think that I have done a fair amount of this by now), I feel that I need to be more directive now.” (Caulat, 2008, pp.11-13)”

After having carefully considered my options for approaching this strand of my inquiry differently, and given some further developments from my co-researchers, I decided to go for maybe the simplest but at the same time for me most challenging option, namely to become more confronting and more directive in my coaching stance. I decided to encourage ‘my’ three leaders to be more daring, to take more action (instead of reflecting so much), and to “jump in the cold water” as I challenged one of them (William). I was absolutely delighted with the response from William when, in January 2009 during a review conversation with him about our evolving inquiry relationship, I asked what made him start experimenting more with his virtual leadership and taking more risks. I had observed that, compared to 2007, he experimented much more in 2008 - he was actually now the one pulling me through his various ideas and experiments at a speed that I was struggling to keep up with. He answered: “You said to me that I had to try out. [...] I asked myself ‘Can I do this?’ [...] I had to do it myself... I am proud”. I felt very happy because this feedback confirmed my decision to change tack, particularly because the learning from William’s experiments in 2008 for both William and myself had been very rich. The most important thing for me was the fact that William felt proud of his actions, and from our conversation I was noticing that he had started to discover the power

of his actions as a way to learn. Does this mean that by changing tack I went into an expert role? I don't think that I did. I did share with him what I was reading or learning from my work with clients, but the main change here was that I became more confronting in my coaching and strongly encouraged William to *do* something as opposed to only talking about what he might do or think.

Another example of the quality of the craftsmanship that I have tried to apply to my research is when, after my viva in April 2008, I was asked by my assessors to narrow the scope of my inquiry because I might be in danger of remaining too superficial. At the end of May 2008 I wrote in my post-viva paper which I shared with my supervisor:

**“My learning from the process so far**

“As described in my transfer paper my selected methodology for the inquiry so far has led me to substantial questions such as:

- To what extent can I combine a second person inquiry with a coaching stance?
- How much can I inquire in a pure collaborative fashion (as described by Heron for example) into relatively unknown territory with co-researchers who don't know what they don't know and with me feeling that I know (at least partly) what I don't know?
- How much do I have to take a lead in my inquiry and advocate more, and how can I still ensure the quality of my research in doing so?
- How can I focus my inquiry in a way that helps me to progress without constraining my curiosity and openness too much? [...]

The feedback during my viva process was very clear and helpful:

- 1) “In my efforts to remain open to the topics emerging from the inquiry with my co-leaders I might run into the danger of being too superficial in my research outcomes. I now need to converge in my attention and research focus.

- 2) I need to become much clearer about the themes of my inquiry.
- 3) It was also noticed that I had been too keen to apply by the letter the principles of a collaborative second person inquiry, and by so doing somehow lost my focus.” (Caulat, 2008b, p.1)”

I couldn't but completely embrace this feedback, as the way it was expressed corresponded exactly to the tensions and frustration I was feeling inside but could not make explicit to myself.

My subsequent exchange with Bill and Robin (ADOC faculty members) led me to seriously consider the prospect of letting go of the second person inquiry altogether to focus on a first person inquiry, which I would perform by working with the concept of inner and outer arcs of attention as described by Marshall (2001). After thinking through for myself what a purely first person inquiry perspective would look like, I couldn't but notice my growing doubts and concerns as to whether I was really taking the right decision. In spite of my efforts to be prepared to change my approach, I was clearly attached to a second person inquiry. Actually my attachment was not to the methodological aspect per se, it was more about the following issue (as I reflected on 14<sup>th</sup> May 2008 in my journal):

“In the context of my research I have come to know that the topic of virtual leadership represents unknown territory. I have also recognised several times my passion for and positive attitude towards virtual working, hence the coloured lens that I am using will be strong in my first person inquiry, whatever efforts I make to remain aware of it. And I notice how keen I am to understand how others experience their own virtual leadership and how they might take a much more critical stance on the topic. In other words I am interested in how others experience their own virtual leadership (which requires a second person inquiry approach) as opposed to how others experience my own virtual leadership only (which would be addressed by a first person inquiry).”

So I came to a point where I wanted to build on the viva feedback as well as Bill's and Robin's subsequent advice, but was keen at the same time to remain true to my convictions and strong interest.

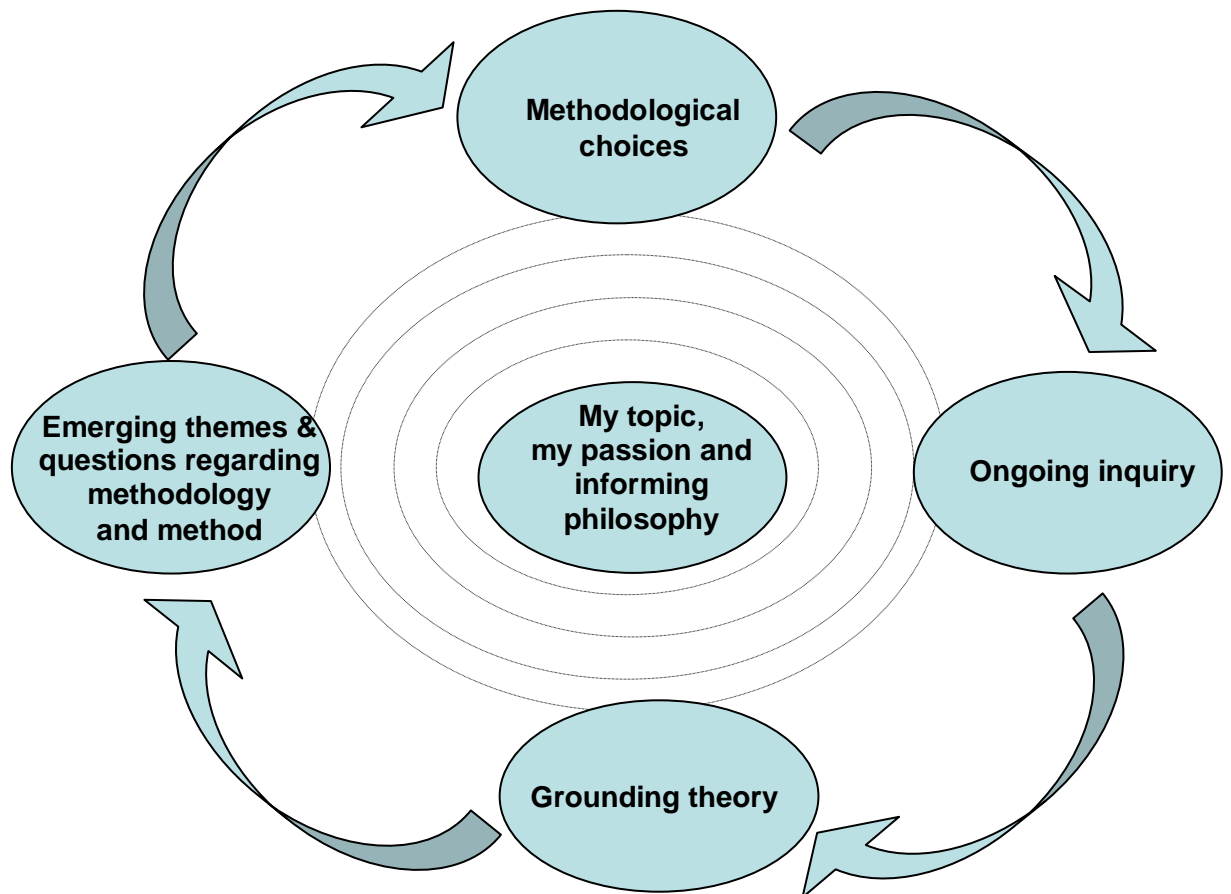


The question became then: How can I get more focus into my inquiry and remain open to the experience of others?

As a result of this loop of reflection, which in retrospect was one of the most critical ones in my research, I decided to stick to my second person inquiry and to shape it differently. For example I decided to narrow the aspects of my inquiry related to virtual leadership, namely to look mainly into presence, trust and power in virtual leadership; as it turned out this proved to be another difficult choice, which I had to revisit – I have already mentioned that my collaborative inquiry group categorically refused to limit their inquiry to trust, power and presence and were adamant that they wanted to stick to the question “What does it take to lead virtually?”.

In an effort to represent how I have tried to demonstrate ‘quality in my craftsmanship’, I am introducing the following diagram showing the cycles of inquiry that I have gone through regularly during my research, and how I have also reflected on my methodology and adapting my method as I went along, based on my experiences. The following questions were guiding my regular checks:

- What am I learning about the topic? What are the emerging themes?
- What am I learning about my methodology and method? What do I need to change/pay attention to?



*Figure 6: My emerging cycle of inquiry*

#### **4.4 The decision to perform interviews**

Interviews (I mean here in particular semi-structured interviews based on open questions) had long been to my mind a method clearly belonging to the positivist paradigm, as I did not consider them to be collaborative. In December 2008 in one of my papers for my supervision group I was writing regarding the interviews with the 'digital natives':

“Given my choice to perform my research for my doctorate in the form of Action Research within the participatory constructivist paradigm I was unsure as to how I could approach this stream of research [digital natives] in a way that would be consistent with this paradigm. How could I inquire with these young people in a collaborative way as I was not ‘one of them’, as I didn’t belong to their ‘community of practice’? Also how much would my research question be of interest to them? What would be the benefit to them, if any?

"I found some comforting support for my plans when reading Reason as he explains how he rejects the term 'validity' in Action Research; he prefers to speak of the 'quality' of research (Reason, 2006, p.199). When it comes to 'quality' Reason connects it strongly with 'choice' and defines it as follows:

"Quality in action research will rest internally on our ability to see the choices we are making and understand their consequences; and externally on whether we articulate our standpoint and the choices we have made transparently to a wider public." (Idem, p.190) - allowing for judgements to be made by the researcher and his/her readers about the nature of the knowledge that has been generated. For Reason "the whole practice of action research is emergent" and "quality inquiry will strive to actively seek out and articulate the choices made" (Idem, p.198).

"Coming back to my concerns about my inquiry with young people I have been trying in this paper to articulate the choices I have made and why I made them. I will also give more details about how I went about the inquiry so that my reader hopefully can develop a fair picture and thus judgement about the nature of the knowledge generated by it.

"Having attended the CARPP (Center for Action Research in Professional Practice) conference on Emerging Approaches of Inquiry in Autumn 2008 I felt very encouraged by the examples of research other people were reporting on. I was particularly interested in the so-called 'hybrid' research methodology that Ospina, Dodge, Foldy and Hofmann-Pinilla had designed for their work in the context of the Leadership for a Changing World Program (a large scale, US-based research project to study social change leadership in 2007). The authors explained how they had chosen to combine qualitative research (from within the empirical positivist paradigm) with a co-operative inquiry for their project and how this enterprise was successful.

"Reading the article the authors wrote to tell their story I found the concept of 'positionality' of the research vis-à-vis research participants (Ospina et al 2007, p.423) and the continuum of positions that range from (1) an insider studying her/his own practice to (6) an outsider working with insiders (Ospina et al) introduced there a concept developed by Herr and Anderson (2005) very helpful.

“Encouraged by the example of Ospina et al, I decided to proceed as follows: I had a series of interviews based on three questions aimed at understanding how ‘my’ young interviewees are currently communicating with others virtually and how they see their professional future in relation to virtual communication and virtual working. Wherever possible I organised a teleconference where I talked with several young people at the same time and used my prepared questions to stimulate a conversation between them. In the majority of cases I recorded the phone conversations. I ended up having very interesting interviews [...] then made sense on my own of the outcomes of these interviews given the specific intention and questions that motivated me to carry them out in the first instance; so I am in this case doing research **on** people and I feel that it is appropriate here.

“I also asked myself whether the choice of having these conversations over the phone was appropriate. I decided it was for two reasons. The first was curiosity: how would these young people react to such a setting for talking to a stranger (only one of my interviewees actually knew me face-to-face), and to being connected with friends discussing a topic they might not necessarily have thought too much about. The second reason was practical: it was easier and cheaper to organise these conversations to take place over the phone. Overall I felt that this virtual way of proceeding was more congruent with my topic and I was very curious to meet ‘digital natives’ in this fashion.

“However during this research work I did come to challenge myself as well, regarding the choice of the medium of communication. Although, as reconfirmed through the interviews, I knew that these ‘digital natives’ would not use teleconferences in their ongoing communication with friends, I decided to go for it as opposed to, for example, a conversation on Facebook or MSN (‘The Microsoft Network’), which turned out to be their preferred way of communication. So I was in a way imposing my choice of medium. The reason for this choice was my own experience that a teleconference allows better collective thinking in a spontaneous way because of its synchronous and voice-based character, as opposed to a word-only based connection that might have been difficult to organise in a synchronous fashion on Facebook or MSN, given that most people - as I currently understand it - use Facebook and MSN asynchronously. As my intention here was not primarily

to experience myself interacting with my interviewees in their playground (which I believe would have been absolutely necessary, had I claimed to have a co-operative inquiry with them) but to develop an understanding of their personal views and usage of virtual communication, I preferred to stick to the selected medium.

“[...] I worked mainly with three questions:

- How do you use virtual communication, with whom and what is your experience of it?
- Would you consider starting and maintaining a relationship that would be purely virtual (in the sense that it would be most unlikely that you would meet the person face-to-face)?
- How would you react to the opportunity to work with a virtual team and/or a virtual boss in the future?

“It is obvious that these questions are only remotely linked with the question of my doctorate [the version of the question was at that time: What does it take to lead virtually and what roles do presence, trust and power play in it]. As mentioned above, my intention for this stream of research was to understand whether the challenges of working and leading virtually were generation based, and whether it might be something which is more natural for the younger generation. I paid some careful attention to crafting my questions for my young interviewees as I was aware that my world of inquiry would probably feel weird to them, and I was keen to connect the best I could with them and their world.” (Caulat, 2008c, p2)”

The second wave of interviews, which I embarked on with MilkCo, was a more natural step to take, having previously gone through a thorough loop of questioning with the ‘digital natives’. In addition I felt more confident regarding my approach with MilkCo for two reasons:

- 1) I was engaging with them on more familiar territory in terms of the communication media that I selected (one-to-one phone interviews), and we had been working virtually together intensively in the preceding four months.

- 2) Ladkin (2010) would advocate expanding the methodological palette when researching into leadership questions as a way to attend to the different facets, such as the context in which leadership occurs, the motivation of the researchers, the expectations for the leaders and followers, etc.

In summary I think that my efforts to ensure the quality of my research can be characterised as follows:

- I have endeavoured to ensure that the results are **useful** to leaders who want to lead virtually and become more effective at so doing.
- I have demonstrated the **quality of my craftsmanship** by regularly checking and questioning what I was finding out, what I wanted to find out, and how I would go about it.
- As a result I have had to **make several choices** (not always easy ones) and I have sought to make these **as transparent as possible**. It will be up to my readers to decide how transparent and clear I have made these.

## **5. Emerging themes**

In this chapter I am presenting the key themes emerging from my inquiry. As mentioned in Section 3.7, after having sustained my research and written separately about the different strands of my inquiry since 2007 (I discussed these pieces of writing at regular intervals with my supervisor and my supervision group), I started looking for the emerging themes across the strands in December 2009. I am presenting these themes in this chapter. In an attempt to help my reader to capture what I believe are the key findings, I am formulating several propositions, printed in blue, throughout the chapter. I will come back to these propositions in Chapter 6 to explore the implications for virtual leaders. I also mention a few questions that I identify as potential areas for further research in orange. I will come back to these questions for further research in Chapter 7.

### **5.1 A new discipline**

In this section I will share examples from several of my inquiry strands and show how they suggest that virtual leadership is a new discipline that needs to be recognised and learnt as such.

#### **5.1.1 The difficulty in engaging and reflecting on the topic**

The first thing that struck me when working with my co-inquirers (William, Sten and Silvia) as well as with MilkCo leaders and my clients at InterCo (as mentioned in 3.1) was the difficulty that they had in reflecting on their leadership in the virtual space.

Firstly there was the sheer difficulty and newness for them of thinking within the category of leading virtually, and therefore of speaking about their virtual leadership. So far my co-inquirers felt that they had to manage tasks and information virtually; they did not see themselves as leaders in the virtual space.

Secondly one could argue that reflecting on one's leadership does not come naturally to leaders, whether they lead in the traditional way (by 'traditional way of leading' I mean a leadership that happens mostly face-to-face but of course would include emails and phone calls) or virtually. Ladkin (2010) explains that this has been one of the reasons why it is difficult to study leadership. She introduces the concept of 'ready-to-hand' engagement (when "the 'things' we use 'disappear' into

the purposes for which they are being used”) and explains that most of the time leaders don’t stop to reflect on their leadership until something goes wrong and/or unless somebody invites them to reflect:

“The fact that those involved in ‘doing’ leadership have difficulty articulating what they do does not mean leadership itself does not exist. The difficulty arises when attempting to move from a ‘ready-to-hand’ engagement with leadership, in which it is seamlessly enacted and thus not consciously available, to a ‘present-at-hand’ examination of it, whereby it ‘freezes’ for an instant and can be subjected to closer scrutiny” (Ladkin, 2010, p.45-46).

This phenomenon I think is well illustrated in Sten’s reaction during our first session: Sten said that virtual leadership had been an unknown topic for him until I mentioned it. He told me what his boss, Bo, said when he informed him that he wanted to be part of my inquiry: “Isn’t it what you are trying to do? Isn’t it what I am trying to do also?”. Sten explained to me how ‘the penny dropped’ in that moment for both of them. When I asked him why he didn’t realise this earlier, his answer was: “I don’t think so much about it [...] I just do what needs to be done”.

I believe that one of the contributions of my inquiry has been to ‘freeze’ these moments for my co-researchers to enable us to look at them in more detail.

The virtual strategy process initiative at MilkCo turned out to be a great success overall, and all the people I talked to have been extremely positive about what they learnt and achieved. Nevertheless most of them said that at the beginning of the process they were sceptical as to whether it would work, and especially whether they would be able to do the work to the quality required. It was a big surprise to them that it worked. One of my interviewees said: “We *actually worked* together [...]. I was really impressed that we were able to achieve so much. I did not expect this at the beginning”. Another person said: “At the end I thought, WOW, that was really a good process”. And: “What we did in four months we would not have been able to do in two years [if we had done this face-to-face]”. Several people shared that opinion. They also felt that people were much more focused on the work in the virtual space. The sponsor himself said: “All of us are surprised that it went so well”. A further participant said: “We had lots of fun also virtually! That was a surprise. I thought that this was only possible face-to-face”.



While all my interviewees were very clear and positive about the benefits of the process and what they achieved, it was more difficult, at least for some of them, to reflect on the leadership aspects of their work in the virtual space. It took some time during the interviews for some of them to enter into a reflexive mode and make sense of the critical moments that they were referring to regarding the virtual work in their team. This confirmed to me again that for many leaders leading in the virtual space is either something they might do automatically without taking the time to reflect on it, or more probably that it is something that they don't do and keep for face-to-face interactions (see the example of my client InterCo in Section 3.1 showing that the leaders would focus on the task in the virtual space and keep the relationship issues for the face-to-face meetings), which is when they fail in their role as leaders of virtual teams.

The same happened with William, Sten and Silvia.

When I started my work with them I quickly found that I had to let go of most of my questions because these were far too sophisticated for them. My co-researchers were only starting to become aware of the topic and struggled to address specific questions. A typical question they would find difficult to answer would be: When did you feel at your best when leading in the virtual space last week? They were not making a clear distinction between their face-to-face leadership and their virtual leadership; they sensed that there were different challenges related to their virtual leadership but struggled to identify their nature.

After some exploration the three of them started noticing some difference. This difference between leading virtually and leading primarily face-to-face (although one could argue that nowadays nobody leads solely in face-to-face mode, since I assume that everybody uses emails and phone) was experienced and framed in a different way by each of them.

For William the key challenge at first was how to establish structure (as a source of reliability and stability) in the virtual world. For Sten it was more about how to be prepared and present in the moments of synchronous connection. For Silvia it was the need to establish her credibility and legitimacy as a virtual leader through having more information and knowledge than the other team members.

At the beginning William and Sten thought personal contact had to happen face-to-face (combining 'personal contact' and 'virtual' was an oxymoron in their minds), and they were saving the personal conversations for the face-to-face meetings instead of exploring ways of establishing and developing real personal contact in the virtual environment. Silvia had a different approach, as she'd had no opportunity to do other than establish personal contact with her team members virtually because the team would rarely meet face-to-face.

The first eight to nine months of my work with William and Sten were mostly characterised by what I would call 'an intellectual flirt' with the topic of virtual leadership. While I noticed their openness to discuss the topic and ways in which to practise, they would not really have a go and experiment with the ideas that they developed with me on the phone. As mentioned in Section 4.3, they finally went for it and experimented with different practices as I decided to become more directive towards them. William in particular developed a wealth of practice in 2008 that I could only follow with amazement. He had found his own place in the world of leading virtually and was clearer about his identity and role as virtual leader, as was Silvia after a while. Sten's story is slightly different as my work with him stopped after 12 months because he changed his role and leading virtually was not required in his new job.

In retrospect I wonder whether the difficulty that my co-researchers were experiencing could be thought of as moving from reflection to reflexivity. Ann Cunliffe (2009) clearly defines the difference between them. Reflection is to be understood as a cognitive or intellectual activity, consisting of thinking about something in an objective, logical and neutral way, based on a realist view of the world with a reality to be discovered, measured, categorised and properly explained. Reflexivity on the other hand, is based on a social constructionist view of the world; in other words there is no one single reality of the world - we shape our social and organisational realities. "[...] reflexivity goes deeper than reflection, because it means interrogating the taken-for-granted by questioning our relationship with our social world and the ways in which we account for our experience". [...] "Being *self reflexive* means questioning our own ways of being, relating and acting" (Cunliffe, 2009, p.45, italics in the text). In the next paragraph I would like to illustrate this hypothesis in some detail, with more examples.

As mentioned, in the first phase of my work with them William and Sten would engage intellectually with the topic but would refrain from actually experimenting and thinking about themselves in this new context. They were sensing that this would require them to question more radically their practice and their own sense of identity. At this stage I would like to share a (real) story of what happened with William to illustrate the point that I have just made. In December 2007 William was showing me the internal webpage that he wanted to put in place for his team members to read information about the division and the different plants. On this page he wanted to regularly publish personal words to his team. He had also asked his assistant to place his picture on the website, but he commented to me that he did not like this picture. When I asked why, he said: "Because I look tired, I don't look upbeat". I answered: "But William, you have just told me that you are exhausted. What is wrong in showing a picture of a tired William? Are people who are currently meeting you face-to-face not seeing that you are tired? Why do you think that it has to be different in the virtual space?" (William very much defines himself as an authentic person.) He was quiet on the phone for what felt like a good while, and finally I checked with him: "Does this make sense what I am trying to question?". He answered: "Absolutely! It is just that I had never thought about it like that! I have been exhausted for several months now [his organisation was going through tremendous changes and he was under a huge amount of pressure] and actually it would be the most unnatural thing to show a picture of me that looked full of energy with a smile all over my face!". I waited a bit and let silence unfold, thinking through myself the implications of what William was saying and trying to follow his thinking. I then asked him: "Have you ever thought about what type of leadership and what kind of picture of you as a leader you want to convey to your team in the virtual space?". William had not thought about it but he was eager to start doing so. The following year was going to be a very intense one for him, questioning his own sense of identity and his leadership virtually.

As already mentioned, when Sten and William finally decided to 'jump into the cold water' they had no choice but to open up for the more radical questioning of their taken-for-granted views of managing, and of themselves as managers and leaders. In January 2009 when I asked William why he finally started acting and experimenting with different activities virtually, his words were unequivocal: "You said to me that I had to try it out. I had to risk my image; potentially I might lose face. Now the conqueror in me is proud of myself because it has become part of me; I don't question it any longer; nobody does; it has become part of the normal things to

do in our management team. But at that time, when you told me to use music [...] I thought: Can I do this? Am I a sissy? Will they see me as a 'shrink'? What I am doing is very controversial for a manufacturer. Some people think: Oh this is a typical William thing again!"

At this stage I should explain the use of music mentioned by William. He had been thinking hard how he could develop a feeling of togetherness virtually across the different plants that he was leading in Europe. He had different ideas of using imagery, which he implemented with some success, but he was still not completely satisfied. I shared with him my views about music and how one can use music in virtual meetings to help develop a common emotional field among people. My original thinking had been very much influenced by Heron's concept of the 'Unified Affective Field' (1999) mentioned in Section 2.2.2 and I had developed ideas about how to use music to offer up front a kind of emotional field, a common ground upon which people across geographies would meet and connect with each other at a level other than the task.

Coming back to William, it became obvious over the two years how he started experimenting with new ways of connecting with others and new ways of leading and how this helped him to rethink his way of being with others and his way of leading others. I will give more examples of this, and also in relation to Sten and Silvia in the following sections.

**Proposition 1: In order to lead effectively virtually, leaders need to have the willingness and capability to be self-reflexive. They can achieve this by experimenting with new ways of relating to and leading others and by taking the time to reflect about that at a deeper level. This requires taking risks and challenging the status quo in terms of managing, as well as deeply questioning their identity as leaders.**

### **5.1.2 The need to shift to a new mode of awareness: unlearning and relearning**

One of the overriding themes emerging from the interviews with the MilkCo leaders was the realisation that, by working and leading in the context of MilkCo's virtual strategy process, they discovered what some of them called 'a new discipline'. They explained to me that they had been working virtually for several years, using

teleconferences, video-conferences (which they soon identified as not very helpful) and so-called net-meetings (web-based virtual meetings), but they felt that this was completely different from what they did in the context of the virtual strategy process. Whereas before they were only exchanging information and monitoring the progress of some projects, they now realised that it was possible to actually think together, co-create new concepts and do 'real work', as some put it. However the biggest realisation was that this was a new discipline, in the sense that they had to learn to work and connect differently with their colleagues in the virtual space. Here is a sample of quotes from my interviews:

- "It was new territory for us. It is a new field and a new feeling that we needed to go into. You can't run it [these meetings] in the way that you have done before. It is a new area of competence even."
- "We understood that we have to do things differently, that there was something that we needed to learn."
- "The question of getting people on board with this virtual way of working is critical. Everybody has to be trained, and needs to understand what it is [...]. People need to understand that it is not a 'normal' teleconference."
- "I began to see the virtual meetings as a discipline per se. Before, I didn't look at it as something you need to learn to master, as a new discipline [...] I looked at it more as a technology than as competences. [...] It was very rewarding. An eye opening exercise. It was very fruitful. It was about discovering something new."

While most people at MilkCo thought that it was a 'new discipline' a few others (five out of the twenty interviewees) felt that it was not very different from the face-to-face environment and that there were only a few subtle differences, mainly linked to the lack of body language. For those five people, working and leading virtually was seen as very effective but deprived of the 'human touch', and therefore not as good as face-to-face work. While others had changed their minds about how they could work and relate to other people virtually, these five people kept maintaining that they could not see any big difference. I have been wondering what made the difference between those two groups. Was it simply a matter of individual temperament? Did we as coaches not manage to help them reflect long and well enough? Are they just resisting changing their mental attitude or do they have different psychological needs from others, needs that I did not recognise? I am still unsure. I will come back to this important point in Section 5.1.3.

The people who considered this a new discipline mentioned the following key parameters as components of this discipline:

“There are new behaviours that you have to learn. You have to push yourself to be more pro-active, to take an initiative. In face-to-face interaction you can get away with having a lower level of concentration. Virtually you have to ask people more ‘what do you mean?’; otherwise you might isolate yourself.”

Another person mentioned that she made a conscious effort not to be distracted and lose the flow of the conversation because she felt that if she did, it would be more difficult to come back into it again. This was also echoed by a third person. The vast majority of interviewees mentioned that they felt that the meetings were very intense and draining; afterwards they would feel tired due to the high level of concentration required. “Personally I found it easier to concentrate in the virtual space. You have to concentrate and **listen** [clearly emphasised by my interviewee’s intonation]. You are more exhausted afterwards. You have to really make an effort to make yourself heard. It takes a bigger effort”.

Another person mentioned that he had to realise that other people’s presence was not a given, and that presence needed to be sustained for everyone in the meeting, hence the need to pay attention to people who had been silent for a while and to think carefully about how to check how they were doing without making them feel put ‘on the spot’. Several participants mentioned the need to slow down in this context.

Another reason mentioned for slowing down was the need to be - as they put it - more careful in the virtual space in order to really understand what others are saying: “The language could be the same, two people might be using the same words but might actually be saying two different things”. One person explained: “I have learnt to be calmer, clearer [...]. You have to take more time to understand what others are thinking [...]. Virtually you are not sure so you become more careful”. Another participant mentioned in particular the need for the leader to paraphrase often what s/he has heard to check the understanding of what has just been said.

From the twenty interviewees, six explicitly mentioned the importance of the so-called 'focus exercise' (see example in Appendix 3). One interviewee mentioned that this was essential because people needed to be tuned in: "It is about getting everybody into the mode of working virtually. It is more difficult to switch off [from ongoing preoccupations otherwise]". One lady explained that she was surprised by the exercise at the beginning: "The first time I thought ... oh ... where are we going with that? Afterwards I realised that it was absolutely key". The participants developed this understanding that being aware of their body was helping them to better connect virtually with their colleagues and to master the task.

One participant mentioned that he felt that the leader in particular was more exposed in the virtual space than in a face-to-face meeting: "You are in a very exposed situation, like in a goldfish bowl. The chairman is more under scrutiny than in the face-to-face". He explained that people would listen more intensively in the virtual space and see quicker and clearer possible disconnections between arguments. He also explained that the style of the leader (as well as of the other team members) would be exposed faster in its positive aspects, but also in its downsides. This meant for him that he would be more focused on how he felt, what he wanted to say and how he would say it. I personally find this analogy of the goldfish bowl very relevant, as my experience so far has taught me that everything gets amplified in the virtual space. Personal traits and behaviours are more visible virtually than they might be face-to-face. The person in question needs to be aware of this and work with this awareness. For example in the context of my coaching role, I gave feedback to one member of the team that when he got excited about something (either positively or negatively) his way of speaking would become very fast and his voice very loud and hard, to the point where it might become difficult for others to understand him. His responded that he hadn't realised this, but that this was also happening in face-to-face encounters. As a result of our conversation he paid a lot of attention to his emotions and, with this increased awareness, chose different ways of expressing his excitement in the virtual space, either by being more explicit about it with the team or by making a conscious decision to keep this awareness to himself for a while and decide in his own time what he needed to do as a result. Another interviewee mentioned how he realised fast that he had no choice but to work differently with his emotions because these became much more noticeable in the virtual space: "You become much more aware of your own reactions. After the first meeting I realised that I became very irritated by two people in particular. Whereas in the face-to-face I would have acted on this immediately, in

these circumstances I stayed with this irritation and started thinking: Is this about me? I started reflecting more”.

All the quotes and examples above underline the need that the MilkCo executives felt to become much more aware of some key aspects of human interaction, such as presence, listening carefully, dealing with your own emotions and reflecting intensively about yourself in the space.

These aspects are nothing new per se, in fact one interviewee mentioned: “I have learnt things that I now apply in the face-to-face. It is about becoming aware again. What I have learnt in particular from this virtual process is that I need to involve others more, also in the face-to-face. It is all about presence. It is not because they are physically present that they are present!”. As a result this interviewee explained to me that he learnt to go slower in the virtual space, to pay more attention to the relationships around the virtual table and to the level of presence in the space: “In virtual meetings it is mandatory to do this. I also now slow down in face-to-face as I have now realised that I will save time in the end”.

Indeed if these aspects are nothing new, they require nevertheless a new mode of working and a mental shift to give them the importance that they deserve. Key aspects of this ‘new mode’ include the need to be specifically focused on oneself and others in the virtual space, as well as the willingness to deal with the amplified patterns that might be brought to light in the virtual space.

In my other inquiry strand my co-researchers Sten and William had the same learning. During our second session I asked Sten to describe when he feels he is at his best in a virtual environment. He answered without hesitation: “When I am in control, when I call her [Sten is speaking about a member of his team] and I have prepared an agenda for our exchange”. Sten explained how much he struggled when she called him spontaneously and wanted to discuss things with him. He explained that he found it difficult to ‘get in the zone’ or to tune in to her and listen well when she asked him to do so without scheduling their conversation beforehand. Sten claimed that for him “it is a discipline in virtual leadership” to switch off and “to have only a piece of paper and shut the blinds in your office” to focus only on the person calling you.



On the day I had my final conversation with Sten I asked him what he felt he had learnt from his virtual leadership experiments. His answer quickly: "I don't like the way I run my face-to-face meetings any longer. We actually don't connect with each other. We don't listen. We are not present to each other". William had a very similar reaction in one of our sessions in 2008: "I don't like our face-to-face meetings where I sit at the top of the table and we have our endless PowerPoint presentations. I want to be more engaged with my people. I want us to be better connected with each other. I have decided to stop all PowerPoint, or at least to have only one or two slides with key figures".

Re-reading all these words from my co-inquirers I can't but notice the choice of their words related to 'tuning in' and 'getting in the zone', clearly notifying the need to develop a new awareness.

I also remember a story relating to this theme. In May 2009 I was invited to talk in London about virtual leadership in front of 30 managers (what I could call a typical mix of the very sceptical, the curious, those experienced in virtual working but frustrated, and the experienced but still curious people). I had invited one of my clients, Rainer from InterCo with whom, and with whose team, I had done a lot of work on virtual leadership. During the presentation we talked about the importance of listening in the virtual space. I still remember Rainer's deep concentration and efforts to describe what listening means for him in the virtual space, and in contrast some bored faces with eyes rolled upwards of attendees thinking so strongly that I could almost hear them: "Here we go again. Listening. This is truly nothing new". After the presentation Rainer was still very excited and his face was slightly red with frustration, almost anger: "They all say that they know what good listening means and that they are good listeners. They have no clue! They first need to learn to do this virtually then they will know!". This story which I have experienced repeatedly in so many facets and variations shows that people usually expect ground-breaking new ways of leading virtually, but the most important thing is actually about revisiting the basics to develop new awareness.

**Proposition 2: Leading others well virtually requires the development of a new awareness of and working differently (compared with face-to-face) with the basics of communication such as listening, focusing and engaging with others.**

### 5.1.3 Be heard but not seen: when slower is faster

One hypothesis I hold as to why working virtually in the synchronous space invites people to become more aware of themselves and others in terms of how they behave, feel, relate to each other is precisely the lack of body language (assuming that people use a web-based platform where everybody can work on documents together and are connected by the phone but not by cameras). I have developed this hypothesis over seven years of practising virtual/audio action learning, based on the feedback that I have regularly received from the participants in my virtual sets. Paradoxically people feel that when they work in a virtual action learning environment (most of the time only audio based with the use of a teleconference setting) their sense-making of themselves and the others in the space is slowing down, but they get faster at identifying what really matters for the person sharing the issue (the issue holder) and they connect at a deeper level (than in face-to-face) with the issue holder and among themselves. (Caulat, 2004)

When I facilitated the ADOC workshop with my peers<sup>9</sup> some had a strong reaction to the fact that they could not see each other. Sibel explained the next day: “What struck me yesterday [...] I was missing faces. I had no sense of people. I had no faces of people to look at”. At which point Alison explained that she uses photographs when she does coaching on the phone.

Ronald also had a strong reaction to the missing faces and introduced the concept of the ‘group imago’: “Unless one person is speaking, I don’t get a sense of anyone else being here, except when I get a message [through the chat room: see screen print of WebEx in Appendix 2] [...] but I don’t have a sense of us as a collective. [...] I don’t have that sense of a group imago. I have a sense of someone when they speak. I don’t have a sense of them when they don’t speak”. So while Sibel and possibly Alison needed to see others to develop some sense of their presence, Ronald at a minimum needed an ongoing vocal contact to develop the sense of the presence of others.

Cindy, on the other hand, seemed to be well connected and with a good sense of our peers in the group through her activities with others on the whiteboard while we were speaking with each other (on WebEx, participants can open an empty slide -

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<sup>9</sup> I have given fictitious names to my ADOC peers and ADOC faculty members in order to protect their identity.

a 'whiteboard' - and draw or write on it together; see Appendix 2). So it seemed did Isabelle who explained how much she enjoyed the 'shared doodling', giving her a sense of connectedness and helping her to focus. When I listened to the recording I noticed indeed what I would call a good moment of connectedness and intimacy: Cindy showed her picture to us all and shared the fun she had drawing it. Then Sibel's picture also came up. It was approximately two hours into our session and I could hear several people laughing (including myself) and Cindy saying "double click is magic", generating a common burst of laughter.



Figure 7: An example of the 'shared doodling' between my ADOC peers

Mark also felt very connected and had a strong sense of togetherness. During the second loop of inquiry he explained: "I did have a very strong sense of community. I felt people with and around me [...]. It was a different sense of a group for me. In the ADOC face-to-face setting I find the circle constraining. I didn't feel confined on

that day. It was a liberating sense of the group/community". He carried on explaining: "The day for me was quite memorable. I still have vivid images of the day [...]. The conversation with Sophie was very intense [Mark is referring here to the moment when my peers were transferred into virtual breakout rooms to discuss in pairs their experiences so far of working virtually] [...], when you came to tell us to come back to the main room I had an image of you coming into my room to tell me 'Now it is time'".

I find the diversity of experiences in terms of connectedness quite striking and I wonder what it would take for a leader working virtually to deal with the variety of needs and responses.

I also believe that the awareness of one's own response is a critical starting point. For example this workshop made me realise how biased I can be through my own experience when it comes to the visual communication channel. Writing about Sibel's feedback I notice how much I underestimate the need that others might have to see each other. When I work with clients, for example in a virtual action learning set, and one participant expresses how much s/he misses seeing the faces of others, I gently but firmly invite him/her not to work from a deficit based perspective (by looking at what one is missing compared with the face-to-face) but to focus on what one has. So far I have felt encouraged to carry on doing so because my experience has been that after a while participants get used to not seeing each other's faces and start explaining how much more intensively they listen to what is said. Generally my own experience, based on several video conferences I did a few years ago, has been that when working remotely, especially when the technology is not first rate, watching the faces of people can quickly become more of a distraction than an enabler. This hypothesis was confirmed through the research we did at Ashridge in 2005 when we asked several of our clients for their point of view. The dominant opinion was that they preferred to use audio and internet based technologies with no video facilities, because the video was not bringing clear benefits and didn't justify the additional effort and cost. As a further example, Val Williams, an experienced virtual facilitator and coach, writes: "In fact sometimes we can miss the essence of a person's message while trying to read body language. Body language can sometimes take away from listening" (2002, p.20).

I am still intrigued, though, by the fact that most people, when they start working virtually, initially strongly want to have the visual comfort of seeing each other. I

assume that it has to do with attachment to what we are used to. I also notice that diverse technology companies are working very hard to develop more flexible, better quality video facilities for virtual working (eg Apple). Yet it is still unclear to me how a group of 40 people can get connected virtually and see each other at the same time. Technology might get there at some point. Actually 'telepresence' from Cisco seems to be on the way and currently is gaining a growing share of the market of virtual communication media. Nevertheless people using this medium explained to me that they are still struggling to get eye contact with other attendees because people tend to look at the camera instead of looking at the attendees via a video link. Furthermore this technology is still very expensive: in some of my clients' organisations the rooms equipped with 'telepresence' need to be booked months in advance, which is perceived by the users as somehow contradictory to the just-in-time modus operandi that other virtual communication technologies offer. These could be seen as secondary hurdles that I assume might be overcome with time when technology has progressed. But my personal belief is that a strong sense of virtual connectivity can be developed specifically without seeing each others' faces. Using the visual channel might actually lock people into a substitute modus operandi (for the face-to-face) whereas non visual channels offer new different ways of connecting with each other and, if used well, can open up a new path with a potentially more potent way to connect.

However until Spring 2009 I had not been particularly vocal about this as I feared that people might think that I was biased towards some technologies as opposed to others. To my surprise though, at a meeting with several clients where we were discussing the topic of virtual leadership, one of the attendees, working for a leading global telecommunication company, stated: "But the use of cameras and 'telepresence' is only a substitute for the face-to-face and actually takes away the potential for higher connectivity that exists in the virtual environment". In my journal after the event I noted how amazed I was, and happy at the same time, about the fact that there are some people out there who experience the same as me. I wrote: "[...] the time has maybe come now for me to become even more challenging and forthright with my view because I do feel that audio as well as web-and-audio based virtual environments<sup>10</sup> offer potential for higher connectivity" (May 2009).

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<sup>10</sup> An example of a web-and-audio based environment is WebEx, where people are linked with each other via a phone line and a screen on which they can share documents and work on these together.

Actually I find some justification for this view in several disciplines that I would now like to explore.

From a Gestalt perspective, as mentioned in Chapter 2, Perls (1969) explains how key the voice is as an expression of the essence of a person. For Heron “The voice has direct access to this original being” (1999, p.236), the voice “is pregnant with whom you really are” (1999, p.234). Gilligan et al (2006), who developed the so-called Listening Guide as a method of psychological analysis, also underlines clearly the importance of the voice: “Thus, each person’s voice is distinct - a footprint of the psyche, bearing the marks of the body, of that person’s history, of culture in the form of language, and the myriad ways in which human society and history shape the voice and thus leave their imprints on the human soul”(Idem, 2006, pp.253-254). She then demonstrates that listening to the voice of a person is a crucial way to enter truly into a relationship with that person.

When I started working virtually I realised how much I still needed to train my listening in order hear to the several components of the voice (pitch, tone, rhythm, etc.) and I actually taught myself to listen more carefully beyond the words. I now often have the experience that, for example, when a friend calls me I quickly notice whether s/he is well or tired, nervous, sick before even asking how s/he is doing. I have tested my understanding several times by saying what I heard (or what I was reading in the voice) and a few times I have had the reaction: “How do you know?”. So my growing hypothesis is that listening is a way to intensively connect with somebody, not only at the intellectual level but at the emotional level, particularly in the virtual environment where there are no visual distractions. Multi-layered listening is like a muscle that everybody can learn to flex more and more. When I run a virtual leadership workshop one of the exercises I do is the ‘three levels of listening’ exercise. This is an Ashridge exercise that we use also in face-to-face meetings, where we invite participants to listen in to three different channels: the content of what is being said, the emotions and feelings the speaker is going through, and the intuition of the listener – what their gut is telling them about what they are hearing. Participants in the virtual leadership workshops usually enjoy the exercise because they find it very enabling. They often say that it helps them to ‘see’ in the virtual environment. Recently one of the participants of InterCo told me that the biggest learning for him was to listen differently when he is on the phone with others.

Isaacs (1999) emphasises the central role of hearing and listening. He shows how in our Western cultures we tend to privilege seeing because our culture is dominated by sight:

“The result of this external bombardment of visual impressions is that we tend to think in these ways. In the Western world we have begun to be habituated to this quick pace, and are impatient with other rhythms. But seeing and listening are very different. The substance of seeing is light. Light moves at a far more rapid pace than sound: 186,000 miles per second as opposed to 1,100 feet per second. To listen in other words you must *slow down* (sic) and operate at the speed of sound rather than at the speed of light. The eye seems to perceive at a superficial level, at the level of reflected light. [Footnote from the author: “This was one of the reasons Plato mistrusted the ‘mimetic’, or image based, artists; his fear was that they would distort people’s sense of reality”.] While the eye sees at the surface, the ear tends to penetrate below the surface.” (Isaacs, 1999, p.86).

The famous German jazz author Berendt in his book “Nada Brahma. Die Welt ist Klang” (2007) (“Nada Brahma: The world is sound”), points out that the ear is the only sense that fuses an ability to measure with an ability to judge. This means that while there are many optical illusions, Berendt explains that there are few acoustical illusions: “the ears do not lie”. He carries on by explaining how he noticed that in our Western world we have a seeing hypertrophy and can’t hear properly any longer. For him ‘seeing’ can remain at the surface while hearing automatically goes in-depth: “Das Auge tastet Flächen ab. Nichts aber kann durch das Ohr wahrgenommen werden, was nicht eindringt. Ja, auch dann, wenn etwas nur oberflächlich gehört wird, muß es immer noch tiefer eindringen als der Blick (...). Der hörende Mensch also hat mehr Chancen, in die Tiefe zu dringen, als der sehende“. [The eye touches the surface. But nothing can be perceived by the ear without penetrating. Even when something gets only loosely heard, it will go deeper than the look. The ‘hearing’ person has therefore more chances to go in-depth than the ‘seeing’ one] (Idem, pp.19-20). Berendt continues that if we want an in-depth change of our conscience (which he argues is necessary in our current world) we need to counterbalance the ‘seeing’ hypertrophy and develop our ‘hearing’ equally well.

Isaacs agrees with Berendt and adds: "The sense of hearing gives us a remarkable connection with the invisible, underlying order of things. Through our ears we gain access to vibration, which underlies everything around us. The sense of tone and music in another's voice gives us an enormous amount of information about that person, about their stance toward life, about their intentions" (Isaacs, 1999, p.86). Based on my personal experience and my experience of working with clients, I fully agree with Isaacs. I also see a clear link with Foulkes' (1975) concept of 'matrix' mentioned in Section 2.2.2. According to Foulkes a group is not just a collection of several individual 'unconsciousnesses', but has a common unconscious, revealing itself in the 'matrix'. Foulkes speaks of 'resonance' as if individuals in a group were connected to each other by a web of mental processes which join and pass through them. Also Heron's concept of 'Unified Affective Field' (1999), whereby people in a group can connect at the level of feelings, seems particularly similar here. For Heron "There is one universal experiential multi-space, the presence of a cosmic consciousness interpenetrating, upholding and including physical space." (Heron, 1999, p.231). My hypothesis is that by slowing down and listening, particularly in a virtual space with no visual stimulation of embodied others, we connect at a deeper level than in face-to-face and activate the resonance between people. As mentioned, I have experienced this several times in the context of my practice of virtual action learning and have explored this at length in my Master thesis (AMOC) dedicated to virtual action learning (Caulat, 2004).

The interesting thing is, however, that almost every time I share my view about the untapped potential of the auditory in the virtual space, the leaders I work with mention that this view goes against what has been transmitted over time about the power of body language, with the well known adage that 78% of the meaning of somebody's statement comes through his/her body language and not through the words used. Having done some further research into this, I found that Mehrabian, whose research is at the origin of this belief, has been misunderstood and that his findings have been simplified to such a degree over time that they have become inaccurate.

In his studies, first published in 1971, Mehrabian came to two conclusions. Firstly, that there are basically three elements in any face-to-face communication: words, tone of voice and facial expression; and secondly that the non-verbal elements are particularly important for communicating *feelings* and *attitude*, especially when they are *incongruent*. In other words, if the words spoken are incongruous with the tone



of voice and facial expression, people tend to believe the tonality and facial expression. This does not mean that non-verbal elements in all senses convey the bulk of the message. According to Mehrabian (1971), these *three elements* account differently for our *liking* for the person who expresses his/her feelings: words account for 7%, tone of voice accounts for 38%, and body language accounts for 55% of the liking. They are often abbreviated as the "3 Vs" for Verbal, Vocal & Visual. On his webpage Mehrabian clearly states this:

*"(...) Total Liking = 7% Verbal Liking + 38% Vocal Liking + 55% Facial Liking: Please note that this and other equations regarding relative importance of verbal and nonverbal messages were derived from experiments dealing with communications of feelings and attitudes (ie, like-dislike). Unless a communicator is talking about their feelings or attitudes, these equations are not applicable"*<sup>11</sup>.

So where does this diversion leave me regarding Sibel's, Alison's and Ronald's sense of missing the feeling of connectedness? Is there something, as I mentioned previously, about getting used to this virtual environment little by little and developing stronger listening skills? Is there also something about virtual working (at least audio and web based synchronous virtual working) feeling more natural to people having an auditory preference as opposed to those who have a visual or kinaesthetic preference (using the Neuro-Linguistic Programming model, Bandler and Grinder, 1979). Although I know that I have a visual preference in NLP terms (I tend to engage better with ideas if I can picture them) I would not say that I have difficulties in connecting at a deeper level with others in a virtual space; however, I had to learn to do it, as mentioned above. I should add here that when I explored the aspect of virtual connectivity with my 'digital natives', Katherine also mentioned how much she struggled because she could not see the person. When we were exploring how she and her friend Juliet connected with others on Facebook, Katherine made a very thought-provoking statement: "They have got no first impressions of you [and vice-versa]". I was very intrigued by that and could not refrain from reacting: "But you must develop some kind of impressions of the people you communicate with virtually!". She then explained further: "I don't remember

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<sup>11</sup> Source: [www.kaaj.com/psych/smorder/html](http://www.kaaj.com/psych/smorder/html) - viewed on 27th march 2010

virtual conversations in words in the same way I would remember conversations with people if I had had these conversations personally [face-to-face] [...] You don't really register as much as you do face-to-face". Could it be that Katherine also struggles because of a visual (NLP) preference that she might have? I actually did not ask her whether she was aware of such a preference, as I assumed that she might not know.

I would like to come back here to the five leaders of MilkCo (see 5.1.2) who said that they could not see a new discipline but only the deprivation of the body language. I find this question about individual preferences, which make it more difficult for some people than for others to connect in an audio based virtual environment (with no cameras), very important and I think that it deserves more in-depth research.

Nevertheless I will dare at this stage to formulate the following proposition...

**Proposition 3: Through our virtual work in audio and web-and-audio based environments we can develop a different listening ability, a sharper sense of connectedness with others in the field, a kind of seventh sense that enables us to connect at a deeper level (than in face-to-face) with ourselves, others and the universe. Because most management and leadership training has been closely focused on the visual and has privileged body language, to be effective in the virtual space leaders will need to develop the capacity to listen differently and more deeply.**

#### **5.1.4 The invisible body as opposed to the negated body**

Still on the same theme but at a different level, I would like to explore the fascinating concept of the manager's body as 'an aesthetics of control' from Harding (2002). Harding shows in her article how the body of managers and leaders has been 'subjectified' and used as a way to help managers to better control workers (through their formal appearance with a tie, a suit, etc... as opposed to the workers' clothes) and as a way of controlling the managers themselves by having them conform to this specific dress code. She goes as far as to demonstrate that one of the reasons why managers remain subordinated to their working lives, apart from the salary and other perks of their job, is 'the aesthetics of the managerial body'. For our argument here I would like to focus only on the aspect that paradoxically in the face-to-face,

because of the way they are dressed, managers perhaps distance themselves more from their bodies than they might do in the virtual (non video based) space! I find the following very convincing, based on my personal experience:

“Managers’ bodies are denuded, so far as is humanly possible, of all references to flesh and nature. Clean-shaven, as much flesh as possible is hidden by the suit. The hands, perforce, must be visible, but otherwise only the head protrudes above the collar and tie. The tie has little if any practical value, but its aesthetics is Cartesian at its most profound: it sharply divides the ‘head’ from the (negated) body; seemingly cutting off the thinking part of the body from the flesh upon which it relies only, it would seem, for locomotion and visibility. The tie is a phalloglinear mark (Reichert, 1992, p.87) that divides nature from culture.” (Harding, 2002, p.67)

I would like at this stage to particularly provoke in the thinking of those who claim to feel disabled by not seeing the body of the person with whom they interact in the virtual space. What is worse: an invisible body or a negated body?

Furthermore some people claim that they feel freer to think and work mentally when they do this in the virtual (non video based) space. For example, as I was doing some experimentation with audio action learning with several participants of ComTel in 2003, Mina, a Finnish lady, said that at times she was getting really caught up in the conversation and kept jumping off the bed and walking around in the room: “I was really involved physically in the conversation. If somebody had been watching me, they would have thought that I was mad”. She explained that in the session she felt freed up from all the conventions and rules that exist in the Finnish meeting culture, where people feel that they should have very limited body movement and facial expression: “Finnish culture really restricts your behaviour in face-to-face; even your body movements to be honest, even your facial expressions become somehow really restricted”. She felt that she could do what she wanted without infringing the rules: “Maybe that gives you the permission, the freedom to express your thoughts and feelings in a different way [when working virtually, with no camera]” (Caulat, 2004, p.55).

Thinking of myself, whether I am facilitating or leading, in a virtual context I tend to be more daring, probing, sharper in my interventions with authority figures than when I work face-to-face with them. For example, in the summer of 2008 I

facilitated several virtual conferences with people from all over the world for RasCo. The attendees were key external stakeholders for the organisation in question and were for the most part well known personalities in several disciplines. After one of these sessions, which turned out to be lively and engaging, I noted in my journal: “My god I am almost shocked about how as a facilitator I dared challenging Mr. R., ex-Minister in Brazil, and how straight forward I was with him” (July 2008). The same happened the next year when I was facilitating a virtual large group conference with 47 people, including the CEO of TamCo. I felt no anxiety about working with them, on the contrary I enjoyed questioning them, probing, testing, etc.. For me the lack of visual clues proves to be an enabler rather than a disabler. It is as if I feel more equal to figures of authority in the virtual space. My reaction also seems to confirm Harding’s hypothesis.

### **5.1.5 The formal and the informal, or a different ‘here and now’**

In this section I will explore the topic of formal and informal ways of relating in the virtual space, mainly by tapping into the experience of the ADOC workshop with my peers.

On day two of the ADOC workshop (which happened face-to-face), Ronald noted how, by inviting the ADOC community to ‘start’ work, I had actually stopped the richness and informal conversations that had been going on until then. I often experience these patterns: when I officially start a workshop and greet everybody in the circle, everything stops and all lively conversations paradoxically come to an end. This can be different in the virtual space: I might indeed officially start the day with a group, but informal conversations might go on among individuals, for example in the chat room of the virtual platform that we use (see Appendix 2). Alison mentioned that the same type of informal interactions might also go on in the face-to-face between individuals during the ‘formal’ exchange, but in a more subtle way. Personally I would argue that this is not the same. The virtual space allows the formal and informal to co-exist with the same weight. Even in some ‘formal’ moments of virtual working I am pretty sure that the informal exchange might actually be more active and vivid than ever. There is some kind of linearity that exists in the face-to-face when it comes to the formal and informal. Usually people have the informal conversations about formal talks in a meeting either after the meeting or in the break. Nevertheless I would argue that the challenge of bringing the informal into the formal - or one might chose to frame it differently as tapping

into the informal conversations, as Patricia Shaw (2002) would say - still remains in the virtual space. It is interesting to notice that most of the people I know who are used to working virtually in their organisation have developed strict working etiquettes which seem to me to make the formal even more stifled, in the spirit of increasing the efficiency of the virtual exchange. For example, in most teleconference etiquettes people are asked to say their names before they speak, and interrupting somebody is seen as an absolute no-go. Even worse, on some of the internet based platforms (for example Centra or Interwise, at least in their original versions) people need to ask for permission to talk; unless the chair of the virtual meeting activates the microphone for them, they are not able to make themselves heard, the purpose being to maintain a clear focus on the task and on the person chairing the meeting. One could argue that the focus of these platforms is on task and leader as opposed to the followers.

However, as I think we experienced in our ADOC workshop, one can also weave the informal into the formal by allowing every participant to use all available means of communication on the platform and to share what they are doing as they go along (see 5.1.3). To what extent people would be willing to share all their informal and personal exchanges I obviously don't know, and I would assume that it would not be possible, nor even desirable. I also think that it might require different skills, and perhaps more importantly a different mindset, on the facilitator's and/or leader's and participants' side for it to happen in a natural and generative way. Personally I am clear that interweaving the formal and informal would require further acceptance of the informal as an integral part of a meeting or workshop. I admit that at times I still hear that inner voice telling me: "They are having private chats, so they can't be listening properly to what we are doing; they are not concentrating hard enough!". From my several conversations with virtual leaders I can claim that most of them think the same at times: "How can I know whether they listen? They might be doing their emails while attending the virtual meeting? Please give me a tool to stop this!". Most virtual platforms allow you to decide whether the participants to a meeting can or cannot use the chat tools among themselves. A recent addition to the WebEx platform features enables the person leading or facilitating the meeting to see a small symbol letting him/her know whether the attendee is watching the same slide as the one s/he is showing. However, I encourage virtual leaders not to even try to control their team members' movements. My explanation to them is: "As long as you sense that they are really engaged with you and with all team members, as long as you make progress in whatever you are doing, it does not really matter if they are

having private chats or writing their emails. By having private informal exchanges they might be helping each other". I often hear surprise if not shock on the other end of the line when I say this.

At this stage I am reminded of Mark's reflection about the first day of the ADOC workshop: "I would not run through four different conversations at the same time. This feels quite abnormal". Mark was referring to the fact that he was having several exchanges of emails with different people as well as exchanges in the chat room whilst also working with the group. I actually agree with Mark that it might feel quite abnormal, and at the same time I know that this is the case for most virtual interactions between people. This is actually what most virtual leaders complain about at the beginning. So what do 'normal' and 'abnormal' mean? From a facilitator's point of view, and maybe even more so from a virtual leader's point of view, the key question is: if Mark had four different conversations at the same time, does it mean that he was less engaged than he might have been in a face-to-face setting? Does it mean that the quality of his engagement was less good? I was burning to ask these questions to Mark, and when I did he answered in the most amazing and helpful way as I went through the second loop of inquiry with him.

I will give you now a bit more detail about what happened.

Not yet knowing Mark's point of view, I wrote the following in my paper in July 2008:

"I am at this stage trying to give an answer to the above questions myself. I didn't feel that Mark was less engaged than when we sit in a face-to-face setting. He actually explained that he felt that the virtual setting was less oppressive than sitting in face-to-face circles. I wouldn't say that I felt that he was more engaged either, but his intervention on day one in the virtual space felt very impactful to me. I could feel - for example when he shared his sense that organisational boundaries were coming down in the virtual space - how vivid his reflection had been. I also have a lively memory of him sharing his experience of being in the garden and watching the rabbits while working with us at the same time." (Caulat, 2008d, p.20)

When I discussed this point with him later he assured me that he was fully engaged with what was happening and he gave me a wonderful analogy to explain the nature of his engagement:

“For me, being in this workshop was like flying in an aeroplane. When I fly with four to five other planes there are people on the intercom navigating me, then there is the radio control person, then I have internal chats on private radio with other pilots. [...] I have all these ways of engaging when I fly an aeroplane, it’s like on WebEx [...]. When we get back onto the ground, what do we think really happened? Which conversations really happened? All of them at the same time, with no one more important than another. It was the same for me on day one: what do we think really happened? [...] In the face-to-face the facilitator tends to hold the space. He can’t do that on WebEx.”

In my view these words of Mark’s describe beautifully how a leader and/or facilitator cannot control other people’s activities in the virtual space, although the latter might still be very engaged all the time. This finding is confirmed by a research undertaken by Wasson (2004) who observed the members of five teams working virtually over a period of time. She comes to the conclusion that multitasking, if people are well trained and aware of when multitasking might be helpful and when not, is something positive:

“Since long before the days of virtual meetings, employees have complained about face-to-face meetings as a poor use of their time. Many meetings were designed in ways that did not absorb the full attention resources of participants, leaving them feeling bored and frustrated. With the advent of virtual meetings, many employees feel relieved to be able to make more complete use of their attention resources” (Wasson, 2004, p.56).

In addition I would like to quote Suler (no date, b) who offers a different concept of presence in the virtual space:

“Relationships in cyberspace encourage us to re-examine many of the traditional assumptions about presence implied in the Be Here Now maxim. As we have seen, the very notion of ‘here’ is called into question [...]. With practice, we learn how to manage a multi-tasking of presence. We can be here and now in one particular online system of environmental and interpersonal presences, while keeping an eye and ear open for something that might call our attention to another system - either the in-person setting or another online setting. Usually it is a change in one of the other

environments that signals us to attend to it. [...] The process resembles mindfulness meditation in which we focus our presence on and with one thing, but also allow another part of our mind to silently notice and then shift concentration to other things that might arise from the wide range of possible presences in the periphery of our field of awareness. Rather than being one-dimensional, presence involves shifts in magnitude, direction, and juxtaposition as we balance and redirect our awareness from here to there". (Suler, no date, "The Here and Now in Cyberspace", page number not available as retrieved from the web).

I completely agree with Suler's view and find the provocation more than appropriate. I am tempted to challenge our views of presence in the face-to-face too. In this context Nevis's allusion (Nevis 2001) to Lewin is very helpful:

"A thorough phenomenologist, Lewin also saw that people in the same situation exist in different life-spaces. For instance, people who attend the same meeting are actually in varying psychological worlds. Whether they are attending to different sensory and mental stimuli or having different need tension systems, they will define their internal experience and their experience of the social and physical environment in unique ways". (Nevis, 2001, p.12).

So I would argue that the same patterns happen in the face-to-face space, but that in the virtual environment they are clearer, more obvious and people can work differently with them. This is precisely what one of the MilkCo leaders meant by: "What I have learnt in particular from this virtual process is that I need to involve others more both in the virtual and the face-to-face. It is all about presence. It's not because people are physically present that they are present!" which I mentioned earlier on.

**Proposition 4: The virtual leader needs to be ready to radically reconsider his notions of 'being present' 'here and now' and to let go of the desire to control what others do in the virtual space. S/he needs to develop the skill to sense others' presence and to win others' attention. The concept of 'share of ear' (as opposed to 'share of voice') comes to mind as a critical one when it comes to leading virtually: it is not about**



how much you say but more about how much you attract people's attention.

#### 5.1.6 When relationships are all you have

One of the key outcomes of the research undertaken by the collaborative inquiry group is the essential importance of relationships when it comes to leading virtually. Rather than making my point and augmenting it with my co-researchers' views, I prefer to give an account of how the group identified the importance of this aspect.

During our second session (since the first session we had agreed that each of us would share our reflection and experimentation) Barbara, CEO of an NGO very active in India and Africa in particular, took her turn and explained that she felt that most of her virtual leadership is based on the informal relationships that she develops with her counterparts in other countries. She suggested this might be different for Matthew and Silvia, assuming that in 'corporate land', as she put it, there are lots of systems and processes on which to base one's virtual leadership. Matthew reacted by saying that Barbara seemed to think that 'the informal' is a bad thing. Silvia then also jumped in, saying: "All I have are the relationships. There are no real formal structures in the international key account management team, no monthly reports". We then reflected on how everything might collapse for Silvia if she didn't pay attention to building these relationships, as these are precisely the foundation for her virtual work. Matthew added that although there are plenty of structures and systems in place in his company "you wouldn't be able to operate without the relationships". We reflected on what this might mean and used the machine metaphor to describe organisations. It seemed that in the traditional face-to-face working paradigm, relationships develop more in the informal anyway, and act as the essential 'oil' to make systems and processes work. This 'oil' might be indispensable but it is not visible, and everybody focuses more on systems and processes. As it is not possible to coincidentally meet somebody in the corridors of cyberspace, the machine (the systems and processes) breaks down. The relationships and their importance become suddenly more 'visible', more tangible. The 'informal' from the traditional paradigm suddenly needs to become formalised in the sense that one needs to make sure that it happens. Systems and processes cannot support virtual leaders unless they are combined with **active** relationships and these need to develop in an **active** way and can't be left to coincidence. We ended up agreeing that it is an essential role of the virtual leader to work on building

these relationships, by bringing the informal into the formal virtual space. At this stage of our reflection Barbara interjected forcefully, underlining the core of our common view and sharing her frustration at the same time: “The problem is the amount of time that I need to invest in building these relationships. What happens virtually doesn’t get recognised. And these relationships are so fragile. Nobody understands that in my organisation!”.

Silvia immediately agreed vehemently with Barbara, explaining that she lives the same experience on a day-to-day basis: “My struggle is to explain to my management how much time it takes to build these relationships. They keep telling me: ‘You need to be more efficient’. They don’t understand it!”. In our last session together, her frustration related to this aspect was still vivid: “It seems that I don’t even reach them [my managers who have no experience of leading virtually] with my efforts to explain the real importance of relationships [in the virtual space]”. At this stage the four of us agreed: we felt that due to the fact that so few people really lead virtually, there is a big gap in understanding. In particular Silvia and Barbara felt quite isolated and not recognised in their efforts as relationship builders. Matthew agreed to that and spoke of a “lack of shared experience”. Silvia spoke of “ignorance”.

Silvia’s words were very sharp and her intonation was strong. Her tone was full of anger. From my work on a one-to-one basis with her I can understand her feelings. At the end of 2007 and beginning of 2008 Silvia had a bitter learning experience. We had spent several sessions exploring why and how she could develop more robust relationships in particular with the Chinese members of her team; we had given substantial consideration to what an acceptable, yet personal, relationship with Chinese colleagues in the virtual space could look like; Silvia had identified which of the themes she could discuss with each of her Chinese colleagues and what personal information she could share with them. Silvia was feeling positive about the progress that she had made with each member, the level of intimacy in the team and its performance. Unfortunately in the first half of 2008 Silvia was confronted with a variety of tough challenges, which she managed to cope with, but at the expense of the relationships that she had developed with the Chinese team. Our session in August 2008 was bleak: Silvia was exhausted and disappointed. She felt that she had lost the connection with the Chinese team, and the business was not going well there. I felt her frustration, exhaustion and powerlessness at the disintegration of the team. I asked her how long she felt that she had not been able

to connect with them as she used to do before (by teleconference, email and personal telephone calls). Silvia explained that she let everything slip approximately one month ago. We reflected together that we are both amazed at how quick these relationships can break down, how fragile they are.

During the rest of the call I coached her to help identify clearly for herself what was most important for her right now, given the immense amount of work and pressure on her shoulders. I was quietly surprised when she put in first place her work on building the relationships again. (At the beginning of our relationship in May 2007 she was most focused on getting the newest piece of information as a way to establish her legitimacy within her virtual team). We then explored what she would like to do as a result. She was very clear that it was all about going back to the discipline of relationship work that she did before: teleconferences, phone calls, sharing more information by email, etc.. At the end of the conversation I sensed that she was more positive and I felt some of her energy returning. She actually confirmed this by saying that she was now clearer about what she needed to do and that she felt good about it. During our next session in October 2008 Silvia's voice was very different. Her job situation still seemed very challenging, albeit somewhat clearer, but more importantly she felt that she was back on track with her Chinese team. I asked her what she had done: she had invested a substantial amount of time on a one-to-one basis with each member of the team. She told me "Talking about food and cooking worked like a miracle: I actually found a good way to connect with two of them". She also mentioned that one team member sent her a special stone with a symbolic meaning, and how touched she was by this personal gesture. She then said: "You know I realised the mistake I made when I was under pressure: instead of discussing the latest figures I could have achieved so much more by starting my conversation with them talking about the snow that we already have here in Sweden". We both reflected further on the importance of this relationship work, and how quickly it was actually possible to rebuild these relationships that seemed broken in the summer. We concluded on the fragility of these virtual relationships, but at the same time how their vitality amazed us: how quickly they bounced back after Silvia's first efforts.

In my research Silvia exemplifies clearly the role of what I would like to call 'the relationship builder' in virtual leadership. This has become an obvious and inherent part of herself. At the end of 2008 she explained to me that she now had an Indian member in her team, and I was impressed and pleased at the same time to hear the

clarity of her plans to introduce him to the team, starting with the relationship building aspects at a very personal level. She had already reflected on how she perceived his personality (she had not met him in face-to-face), what she anticipated would be easy and more difficult for her Chinese colleagues, and how she wanted to go about dealing with that in her role of relationship builder.

The theme of relationship building has also been an important aspect of William's virtual leadership. As soon as he started transferring a significant amount of his leadership activities to the virtual space, he noticed the urgent need to do something at a personal level. In 2007 he came up with the idea of 'virtual popcorn time', which he implemented in 2008 with what he felt was a good result. He would organise teleconferences with no agenda: people would be invited on a Friday afternoon into the conference and encouraged to bring something to drink and nibble. The purpose of the meeting would be to talk about things people wanted to talk about. This could be what happened in the last two weeks, rumours, how people were feeling, etc. William would make a point of not bringing any agenda point and just being part of the conversation. He mentioned that when he started, people were a bit unsure and would find this practice unusual, so at first not many attended. However after a few virtual popcorn sessions more and more people attended as the news spread that this was really good time spent together. Besides, William would specifically call members of his team individually when he felt that they had made a point during one of the virtual meetings which he might have not answered to their (or certainly to his) satisfaction. He reported to me how positively surprised people were to receive his call and hear him say: "You know the point you made at our last virtual meeting? I am not sure that I answered it completely and I wanted to follow up on this with you", etc.. William has always been convinced that this would make a big difference at least to his feeling of connectedness with his team. He also reflected with me on how different this type of activity would be from the face-to-face: in the latter you would not need to plan for this to happen, you would meet the person in the corridor and talk to them. Virtually these calls would need to be planned and done on a regular basis and they would require a lot of his time. During one of our conversations William actually mentioned how much he was noticing the shift in his activities and how much more time he was spending in these relationship building activities compared with previously in the face-to-face.

Learning myself from the power of William's virtual popcorn time, I happened to mention this to a group of virtual leaders at InterCo in a virtual session, when they

were expressing their concerns that relationships could only be built 'personally', by which they meant 'face-to-face'. This choice of language to describe 'face-to-face' as opposed to virtual (which as a consequence cannot be personal in their minds) is something I have come across a lot in my work with virtual leaders. I challenged their automatic way of associating face-to-face and personal as opposed to virtual. There was quite some silence on the line from the 14 participants, but I could feel that the silence was pregnant with intense thinking. After a while a few people started saying: "Actually why not?!". I then invited them to discuss in pairs how virtual popcorn time could look in their own teams. A few ideas were discussed. To my delight in a follow-up session with one of the participants, a lady in charge of leading several teams across the whole Asia region, revealed that she had been implementing 'virtual coffee corners' bi-weekly. She was really pleased with the results and claimed that she would have never been able to implement necessary changes in Asia without these virtual coffee corner conversations, because they were the emotional glue which kept the teams together.

I would like to come back to the common assumption, held implicitly rather than explicitly, that virtual working cannot be personal. In my experience of numerous conversations with leaders around this question, one key reason is the fact that people believe that without seeing the person's eyes and body language it is difficult to enter into a personal relationship with somebody. I did already tackle what I allow myself to call the myth of body language earlier on (see Chapter 5.1.3). I will also come back to this aspect from another perspective when exploring the topic of trust in the virtual space in Section 5.3. Another interesting aspect that might explain people's resistance to being able to conceive how personal relationships can develop virtually might be illustrated through Sten's story.

During one of our sessions I asked Sten the following: "Could you imagine leading a team of people without seeing them face-to-face for over a year?". Steve answered immediately with a clear "No". I asked why and he explained that he needed to see people physically for them to be real to him. I then invited him to explore how real B (a member of his team) was for him. He had been talking a lot about her, explaining that she needed a lot of attention in the virtual space and lots of support because of her very demanding job. Therefore B was taking a lot of Sten's time even if he didn't see her often. Hence I asked: "Is B not real then? Would she be less real in those moments when she calls you to share her anger or frustration if you hadn't met her before?" There was a short pause, and Sten responded: "Actually I could manage

her even if I had never seen her before. In these moments she is very real to me. I could do it, I guess. After a while it wouldn't matter to me any longer [whether I had met her or not]". At this stage I was struck by how much Sten had moved in his thinking during a ten minute period. At the time I asked myself whether this was solely due to the fact that he had not stopped to think about this previously, or whether there was something else behind it that I ought to explore a bit more. I made a note of this in my papers.

During my next conversation with Sten in September 2007 I asked him whether we could come back to this point, as this felt important for my/our inquiry. Sten agreed and through the meandering of our new conversation we suddenly focused on how and whether he praised B for her good work. He explained that he kept praise for when they met face-to-face, and since they didn't meet very often he felt that he didn't praise her enough as a result. I then asked him whether he never praised in his virtual communication. He answered that he did it at times per email, but that this was not enough. I asked him whether he would consider praising B during his phone conversations. Sten explained that the conversations tended to be task focused: "I cannot detach myself from the task". I asked him why he thought that he behaved like that. I noticed a moment of silence and sensed some kind of embarrassment: "I think this is because of the way I was brought up. I do the same at home. I ask Emily [Sten's daughter] to get off the phone when she talks too long with her boyfriend." This example shows nicely how some of us still associate phone calls with something expensive. Hence the calls should be limited to what is 'important'.

I would like to come back to our starting point, namely Silvia's frustration, and even anger towards her management team who cannot understand the importance of building relationships if one wants to succeed in leading virtually. We started by realising that in a predominantly face-to-face leadership paradigm the focus would be on processes and structures, and most of the time relationships would operate as the necessary oil in the machine and would develop as a by-product in the informal space. They would be an invisible 'given'. In the virtual space, because relationships cannot develop if they are not given time, space, attention and care, they might end up deficient and the leadership and/or management machine won't work: the oil is missing. However for most leaders starting to lead virtually, the sheer concept of building relationships virtually to support their work is challenging to say the least. Several implicit judgements get in the way. Nevertheless, as I

hope I illustrate through my inquiry, relationships are essential. The leaders who understand themselves as 'relationships builders' achieve amazing results.

To complete this section on the importance of relationships in virtual leadership I would like to mention the article "The impact of superior-subordinate relationships on the commitment, job satisfaction, and performance of virtual workers" by Golden and Veiga (2008). Both authors claim that no analysis of the importance of the superior-subordinate relationship in the virtual space has been done so far. Through their work based on a survey with 375 professional employees, they showed how pivotal this relationship is and its impact on commitment, job satisfaction and performance. They claim that the traditional working relationships will need to change in the virtual space, although they remain unclear as to exactly how. From my research with my co-inquirers I would absolutely agree with Golden and Veiga, and add that these relationships would need to be first recognised as pivotal by leaders, and intensively focused and worked on in a personal and dedicated way.

**Proposition 5: The virtual leader needs to recognise relationships as THE key pillar of his/her virtual leadership, and needs to be prepared to face challenges and a lack of understanding from traditional managers. Building and nurturing relationships in the virtual space and finding the appropriate ways to do so is an essential aspect of virtual leadership.**

**Question for further research: What is the impact of social media (eg Twitter, Facebook, MSN, etc) and how might these become (or not) a natural way of informal connection?**

Before moving onto another key aspect of virtual leadership I would like to summarise the most important ones explored in this section (5.1) positioning virtual leadership as a new discipline:

- Leaders find it difficult to engage with the topic of virtual leadership, as it is not yet recognised as an established well defined category
- To lead well virtually it is necessary to radically revisit the basics of communication, such as listening or engaging with others, and to shift to a new mode of awareness

- Leading virtually sheds a radically different light on the importance of the audio communication channel as opposed to the claimed need to see people in order to develop a personal connection
- Good virtual leadership practice redefines the concept of 'here and now' as well as 'presence', and makes multi-tasking acceptable
- In the virtual space relationships become at least as important, and probably even more critical, than the task.

## **5.2 Leading and/or facilitating?**

In this section I will be exploring different aspects of leading in the virtual space, in particular by looking into specific moments of leading virtually across several of my inquiry strands. At the end of the section I will attempt to offer a summary of my findings regarding the role(s) of a virtual leader.

### **5.2.1 The MilkCo leaders' experience**

The interviews with the MilkCo leaders brought up a very interesting theme around the actual concept of leadership. Going through my notes I notice the flurry of words used by my interviewees regarding the description of leadership aspects in the 'virtual strategy process': chairman, facilitator, leader, rotating leadership, rotating chairmanship, distributed leadership.

As we started our coaching work, my colleagues Lee<sup>12</sup>, Peter and myself discussed with great care our role as coaches. We were very conscious that we were entering a field, coaching virtual teams that we didn't know very well. We would only be able to rely on the research that I had been doing in the field of virtual learning and virtual working since 2003. We agreed that we would provide a minimum of structure to the teams, more of a discipline actually, which, at the start of the virtual meetings consisted of making sure that people could get on line without major technical hurdles, and that they would check in at a personal level and go through the focus exercise. Then we would leave the team to their own agenda, asking the occasional question or offering the occasional comment, mostly in connection with the content of the project but also at times related to the process, particularly if we felt that the team had been stuck for too long. Only at the end would we facilitate a reflection round varying between 20 and 45 minutes, about how the team felt that they had

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<sup>12</sup> Disguised identity, as for Peter.



worked together and what they were discovering about what makes effective virtual working and virtual leading. We would also offer feedback ourselves about what we observed. Although we would insist on this discipline of reflection we were keen to let the team decide what kind of leadership they envisaged for their work together. This was partly due to how we had defined our role as coaches (we were working with very senior leaders and we didn't want to prescribe anything, as we felt that the teams had to do this for themselves). Another key reason was that indeed we didn't necessarily know better as to what type of leadership would be best for them in this virtual context.

The patterns that actually emerged from the teams over time were very interesting. Although the leadership took several different forms across the teams, there were also some similarities.

The teams went for a variety of 'leadership-formulae':

- One team went for a rotating leadership, where for each meeting and the time up to the next meeting a different member of the team would lead
- Three teams went for one leader being responsible for the team during the whole process
- One team went for what I would call a 'tandem-leadership' with one person leading the process in between the meetings (preparing, taking notes, or even making things happen) and another would 'chair' (their words) the meetings.

In spite of these different formulae there was recognition across all teams that the leadership required qualities which they described as follows:

- "The chairman was not driving the meeting. It was about keeping it together". "The idea was that there was no leader but a rotating chairman, also in between the meetings" - Team 5
- "The leadership was about securing that there was an agenda, that objectives got reached, taking the responsibility of leading for four hours" - Team 5
- "I would not give myself the label of 'leader'. It was distributed. I was contributing in pushing the project forward, putting things in writing, developing a shared understanding, getting structure into the thoughts. It

was about providing a careful process to develop a shared understanding and not leaving anything unsaid.” - Team 5

- “The leader as an enabler, not the one putting his view forward” - Team 4
- “X was serving the team.” “As a good virtual leader he showed himself as a facilitator. He was the one who put himself in the service of the virtual team.” - Team 4.
- “You want to deliver. You want to be ahead of the group in order to provide the group with security, safety, comfort, a feeling of reliance. However you don’t impose. You only ask questions.” - Team 4
- “To take the lead you have to be more careful.” “The risk of failing (in the sense of not being accepted) is much bigger than in face-to-face.” “[...] it is different from the face-to-face, in that it is not about leading by taking decisions, or telling the way, but what is key is the agenda, clear goals, ensuring participation from everyone all the time. Preparation is essential [...]. For me a pivotal moment in the group was when I provided an action plan. This helped the group to move forward.” [...] “I established my leadership by providing a structure and a plan.” - Team 1
- “The leader is mainly a facilitator. His opinion is not more important than the opinion of others. It is about being extremely careful, repeating, checking the understanding, giving verbal clues.” - Team 1
- “It puts a lot of pressure on the chairman: preparing the agenda, leading the meeting, facilitating.” - Team 2
- “I don’t think that there is one way or one description [of the virtual leadership role]. You have to wear a listening hat, invite people to speak, involve all members of the team.” - Team 2.
- “The leader is a virtual facilitator. When facilitating you need to be very alert, listening, leading, shifting the focus of your concentration from process to content.” - Team 3
- “It was Y leading after a while [...]. She was driving the process although others were actively leading as well, but it was good to have an elected leader as fallback, for the cases when others get stuck. It is a different leadership.” - Team 3.
- The sponsor of the teams explained how at first he was anxious, not knowing how he should “manage all these teams and control their progress”, but that then he realised that his role was more “to try to answer their questions, to think how to best connect the teams. My role was more to help and support”.

There are two examples in particular which illustrate how the team members had to realise that a different type of leadership was needed, compared with what they knew before. I will take the examples of Team 4 (which I was coaching) and Team 5 (which Peter was coaching). In both teams the members had taken great care up front to discuss and decide who should be the leader of the team and they felt that they had come to a good decision. However in Team 4 they soon came to realise that the way they worked was not going well. The official leader of the team remembers: "We were desperately looking for a line, there were so many different angles [to the issue]. We were getting stuck". I asked him: "What made the shift for you?". He answered: "I realised that I had to prepare for the meetings much more and to work on something that we could discuss". Another interviewee from the same team explained: "Z was serving the team. He understood quickly ... that he needed to adapt".

A similar story happened to Team 5. The team leader remembers: "After the first meeting with me leading I realised that I had not prepared enough. I didn't know what to expect [...]. I had underestimated the difference between leading a meeting face-to-face and virtually. During the first meeting we had a silence. It felt like emptiness. The leadership was unclear [...]. We decided that someone else needed to take the lead, and it was a smooth process. We had some dips during the project but there was always somebody to pick us up. We all had respect for each other's leadership".

These two stories illustrate well that even if they had clearly agreed on who should be the leader beforehand, they were not clear about the kind of leadership needed in this virtual process and they had to discover it as they went along. From a phenomenological perspective, the fact that in both teams something went wrong, or at least got stuck, obliged the members to move from a 'ready-to-hand' to a 'present-at-hand' (Ladkin, 2010) awareness; this means that they were confronted with the need to deal with the very nature of the (their) leadership in the team, and that they could not just transfer onto this virtual process what they would automatically do face-to-face. The process of regular reflection helped them to do this. In both cases one key learning was that they needed to prepare before and follow up better after the meeting. In other words they had to become less event and more process focused in terms of flow of information, tasks and relationships. In the end Team 4 went for one leader throughout the whole process while Team 5, as mentioned before, decided to go for a 'rotating leadership'. Both ended up

having different experiences that I would like to describe now as they again provide important learning and insights.

I interviewed five of the six members of Team 5 and four of the five members of Team 4. Whilst all interviewed members of both teams mentioned to me how energised they felt by the work, and how much everybody was 'pulling their weight' - confirmed by my colleague Peter who was coaching Team 5 - Team 4 seems to have had a slightly different experience. My interviewees of Team 4 all underlined that they felt responsible for the team results, and that they had ownership of the team work, given the leadership style of their team leader who enabled others to take leadership. In my role of coach to the team I could actually witness this. However the team leader himself felt at times rather overloaded with the leading task at hand, and perceived it as very energy consuming: "I felt the need to be better prepared than the rest [...]. I took on too much. It was probably due to my own very high motivation. If I had not been that motivated, I would not have taken on too much. [...] I had the fear that it would fall apart if I didn't give it backbone. It was my own anxiety: what if nobody takes the baby?". I could certainly observe how much the team leader was taking on during the project, and twice I even offered an observation to him about this. There was a need to give structure to something that felt unbounded and unstructured. Interestingly if I look at my inquiry strand with William I note that in the beginning he also defined his virtual leadership in these terms, focusing on providing structure and stability (see 5.1.1).

These views and feelings correspond very much to my own experience of leading the Virtual Working Practice Group at Ashridge Consulting. I make no compromise and insist that we hold our meetings virtually as a consistent way to experience and learn from our own practice. Most of the time I feel like the leader of Team 4: I feel that I need to prepare very well before and after the meetings, that I need to keep in regular contact with the team members in between meetings, and that I need to think ahead and be prepared to address any concerns of my colleagues. As a result I often feel tired in this process. Like the leader of Team 4 I also have at times the fear that if I don't prepare and provide the structure, the whole thing will collapse. This might actually be a mistake: by providing too much structure and comfort, I might be contributing to making others become more reliant, and the balance between providing support and challenge might be even more fragile than in the face-to-face. In addition it seems that there is something particularly difficult for people in taking the lead in the virtual space. I made conscious and strong efforts at

the beginning of 2009 to invite colleagues of the Practice Group to take on and lead whole streams of related work. To my great disappointment only two colleagues shared the lead on one stream of work, nobody else volunteered and I ended up carrying on with the same workload minus one stream. This experience led me to intense reflection about myself, as I was wondering whether there was something in the way I led virtually that would prevent others from taking a lead. I talked about that with a few colleagues, who explained to me that in the other Practice Groups (run most of the time in face-to-face meetings) people would not necessarily take more on and that the other Practice Group leaders were having a similar experience to mine, in the sense that they needed to drive, manage, do. Nevertheless I am wondering whether the virtual space doesn't actually accentuate this tendency.

The experience of Team 2 at MilkCo also seems to echo this: "Nothing happened until one of us took the lead. [...] when leading, you feel fully responsible. It [the responsibility] is on your table" (leader of Team 2). Another member of Team 2 explained that there was a lack of leadership in the team: "Nobody wanted to take the lead. [...] the team leader had to take on a big role. Delegation of leadership to others was difficult. Nobody knew how to tackle this [leadership] issue".

Does this mean that a rotating leadership is a better approach in helping avoid over-reliance patterns? Or does it mean that the leader of a virtual team needs to find ways to best care for the team without making the team members feeling too compliant and dependent? And what about the potential lack of leadership that might occur in a virtual team?

As mentioned in Chapter 2, there is still little literature about the leadership of virtual teams. The few authors who talk about the leadership aspects do not directly mention the concept of 'rotating leadership', but argue that 'distributed leadership' (which I consider close to 'rotating leadership' in the sense that the leadership does not rely on the same person all the time) correlates positively with virtual teams' performance. They quickly associate virtual teams with self-managing teams. For example Yoo and Alavi (2003), who did a longitudinal study of the email exchange of seven ad-hoc and temporary virtual teams of senior executives in the US, suggest that future research conceptualises virtual team leadership as 'distributed leadership'. The same applies to Bell and Kozlowski (2002), who developed a rather complicated typology of virtual teams, and concluded that because leaders of virtual teams cannot directly monitor team members, they need to create self-

managing teams with distributed leadership. In the light of my research findings I would not agree with these conclusions. The MilkCo leaders in particular understood a lot about self-managing teams, as they had worked in such project teams several times before, but this was not necessarily helping them in this process.

It is maybe no coincidence that hardly anybody spoke about virtual leadership in virtual teams until recently in the literature because, as we have seen, leading virtually might be more about facilitating (so this would require researchers to think in new shifting categories); at the same time, it seems more difficult for people to step up and take a lead in the virtual space, as they don't know up front what leading virtually actually means. Leaders might feel intuitively that leading virtually is different from what they have known as leadership so far, and therefore be scared or intimidated by the fact that they don't know how different it will be and what this difference is about.

Another interesting take on the issue of virtual leadership was the opinion of one member of Team 3. The interviewee completely shared the view that leading successfully in the virtual space, based on her experience of the 'virtual strategy process' at MilkCo, meant first facilitating virtual team work. She was also, however, very clear that the virtual leader could not at the same time facilitate the meeting (in the sense of focusing on the process, listening, being alert to and identifying people's emotions) and put across his/her own views. I invited her to explore this strong view in more detail with me. She talked about her own experience in the team when she took on the facilitation role, and explained that it is very hard - almost impossible - to focus intensively on the process and on the content at the same time, and to do justice to both. We both came to the conclusion that this requires great versatility and that the leader ought to be able to shift focus swiftly between process and content. This line of thought also resonated very much with my own experience and I would like to take a small diversion here to underline this aspect.

When facilitating the ADOC virtual workshop, Cindy, who already had experience of working virtually with groups, noticed the richness of the WebEx platform: "We can all simultaneously chat with each other [in the chat-room: see Appendix 2], speak with each other in plenary and co-create or write things together on the whiteboard. In the face-to-face environment we would usually be able to do only one at a time".

Cindy was wondering: "If we are to become practised in tapping into the richness of all these forms...". In the moment that she said it I noticed my head vehemently nodding and my mind immediately reconnecting with previous thoughts about that: indeed if we were to develop the capacity to communicate at all these levels simultaneously, what might such an experience be like? I assume that we would need to let go even more of our linear way of thinking and interacting with each other, as different streams of interaction and communication might go on simultaneously with the same people and/or different people, and the sense making process might become more cyclical, or more something else (I can't even imagine the form it might take at this stage). However, in the workshop I limited myself (more unconsciously than consciously) to reacting to Cindy's thoughts by underlining the choices that I felt I needed to make as a facilitator, knowing that I cannot at the same time attend to what is going on in the audio space, on the whiteboard and in the chat room. I answered that I sometimes "get overwhelmed by this. I constantly need to make choices. My brain cannot get it all". This has actually been an ongoing challenge during all the virtual events that I had been facilitating. For example, when I was facilitating a strategic engagement process with a major global organisation (RasCo) and during the online workshops the participants had a tendency to either speak a lot (taking a lot of air time) or write a lot in the chat room. I have observed myself in these instances taking a quick look at the chat room now and again, and inviting the people who posted something there to share it orally with the other participants, which is actually what they might have wanted to avoid in the first place. But confronted with my own limitation of comprehending all the different streams of sense-making going on at the same time, I assume that the same must be going on for the participants, and certainly for the ones in a leading position within the team. So what might be different ways of communicating, facilitating and leading that might enable these parallel streams of thought to be combined in a more natural way? Are we here encountering the opportunity to develop new skills for a richer sense-making experience? And if the leader or facilitator of a meeting does not attempt to bring into the audio, and hence the plenary conversation, the exchange happening in the chat room (as I did with RasCo), would this reinforce the disconnect between the formal discussion (in the audio/plenary) and the informal (in the chat room)? What might be the consequences of that in terms of the team's way of working together? But who am I to decide what is formal and what is informal in this space?

Before moving on with my questions about leadership forms in the virtual space, I would like to pause and underline one specific aspect: you might have noticed particularly in the last paragraph that I constantly move from 'leader' to 'facilitator' (or from 'facilitating' to 'leading') and vice-versa in my questions. I feel that it is important for me to do so as a way of going more in depth and stretching the semantics. I could repeat at this stage Alvesson's views on leadership research (see Section 3.1): "An open attitude to the subject matter, including considerations of alternative research vocabularies or lines of interpretation before, during or after the research process (Alvesson and Sköldbberg, forthcoming; Rorty, 1989), may benefit the intellectual inquiry" (Alvesson, 1996, p.469).

Coming back to MilkCo and my interviewee from Team 3, as soon as we came to this intermediary conclusion of potentially the need for a new profile of a virtual leader, she bounced back and explained that she didn't believe that this was the solution either - assuming that it would be possible for a virtual leader to develop the skills and capabilities of such versatile leading. In her view, the moment a leader puts across his/her standpoint on an issue s/he would immediately lose his/her credibility as a facilitator. According to her, there is something so fragile and at the same time so important in the leadership-facilitation aspect that it can be destroyed quickly if the person in charge of the meeting tries to push his/her opinion. Therefore she was strongly advocating a clear separation of facilitating and taking a standpoint. I ought to underline that this view was in some aspects already present in the words of one member of Team 4, who specified that the leader of a virtual team had to put him/herself at the service of the team.

The consequences of this standpoint would be twofold: either the leader (in the traditional sense of chairing a meeting, stating his/her standpoint and taking decisions) would need to get a facilitator for his meetings in the virtual space, or the concept of leadership in the virtual space would need to shift altogether with leading becoming more enabling, serving, providing the space for others to work and decide. In any case it would be a space where leading and facilitating became blurred. These consequences would be true for the synchronous mode but how would they look in the asynchronous mode? While I can easily see the leading-facilitating tandem formula working well in the synchronous - this view is based on my experience of the 'virtual strategy process' at MilkCo as well as my own experience at Ashridge - I find it more difficult to imagine how the scenario of the leader in the traditional sense with an additional facilitator would work as well in the



asynchronous space. Does this mean that one person would look only at the process in the asynchronous mode, while another would make sense of the content, take decisions and communicate these? Does it mean that both would work in tandem on a continuous basis? How sustainable is this in the long term? Also what might the implications be of delegating the process aspects to a single person in the virtual space? Would virtual leaders (the ones taking decisions) ever become able to lead virtually on their own if they don't develop this virtual process competence?

Actually the experience of Team 3 might support, at least partially, the concept of a leadership tandem. As a coach of Team 3 I did experience how the team members got stuck early on in the work. Asking the official team leader what he felt got him/them 'stuck' elicited the answer: "We had the discussion about me taking the leadership. We should have really discussed what that means - 'leader' - in that context". He thus expressed the same idea of a new, or at least different, understanding of what 'leading' meant. I then asked him what he felt got him/them 'unstuck' and he answered: "The big difference was when we talked about the way we worked together, and we divided work [...]. It was because we had the discussion and we organised the work among ourselves. Everyone contributed in several ways. [...] the leadership was discussed thanks to you Ghislaine, and we made real progress". Team 3 went for a tandem solution with one person facilitating the meetings and the other preparing and making things happen in between. The division of roles was not between leading (in the sense of taking a standpoint and making decisions) and facilitating the virtual meetings, but it was still a division between two roles, facilitating synchronously (role A) and managing and facilitating asynchronously (role B), both roles together making an effective virtual leadership.

The reflections from and with my interviewees so far don't seem to be pointing to a clear 'winning' formula in terms of virtual leadership. However they certainly show what worked and what didn't work in the specific circumstances of the 'virtual strategy process', even with differences between the teams. There is also the clear recognition that the leadership formula each team went for doesn't correspond to the traditional view of leadership. The concrete examples of virtual leadership experienced by the teams certainly raise important and interesting questions. The key one for me at this stage is whether the scope of leading virtually is too wide for only one person to take on as a role (as this would require an acute capability to embrace and shift swiftly between content and process), or whether it would be

possible to develop the skills and capabilities of virtual leaders so that they can take on this bigger scope individually.

At this stage I also want to pause and reflect about the new emerging category of virtual leadership as a blurred area between the traditional categories of leading and facilitating. Ladkin (2010) underlines how important it is for the leadership researcher to be aware of the 'absences'. By the concept of 'absences' she means the invisible factors influencing what occurs, what people expect of their leaders, what leaders expect of their teams, etc. as a result of their background.

"In summary, one cause of the difficulties associated with studying leadership is that as a socially constructed phenomenon, it operates largely through its absence. This includes the absent expectations carried by both the 'leader' and the 'followers', through the stories that are told about the 'leader' and through the culture from which leadership arises." (Ladkin, 2010, p.43)

I am very aware that MilkCo is a Swedish company and that the Swedish-ness of the leadership is dominant in the organisation worldwide. In Swedish organisations, in my experience, leaders are generally expected to take on the enabling and coaching leadership approach rather than the prescribing, heroic approach. Nevertheless my experience of the organisation over the last three years has been that leaders would still present their views while seeking to achieve some consensus through a facilitative process in the decision making; they would not limit themselves to being pure facilitators in the traditional leadership space. I am now, however, wondering whether the fact that my interviewees so clearly emphasise the importance of serving the team and facilitating corresponds to an 'absence' (Ladkin, 2010). This 'absence' regarding the facilitative aspect of leadership expected by the MilkCo leaders would become pretty loud and present in their interpretation of their experience of the 'virtual strategy process' through our inquiry process, and would therefore influence their conclusion as to what makes effective virtual leadership. Another way to approach this question would be to ask: "Would I have achieved similar results if MilkCo had been an American or a French company?". Actually it seems that virtual working is currently more widespread in the Scandinavian countries than anywhere else in Europe. In the context of my work at Ashridge I also notice that of the four key projects that we delivered in virtual working / virtual leadership between 2007 and 2008, three were for Scandinavian companies (this

trend also carried on up to 2010). Therefore another conclusion could be that precisely because the Scandinavian leadership cultures tend more towards a facilitative stance, they seem to be more disposed to leading virtually. Obviously another interpretation could be that Scandinavian countries are usually much more aware of environmental concerns, and therefore Scandinavian leaders and managers are more willing and open to the challenges of leading virtually. It could also be a combination of both reasons.

The notion of blurred categories linked with the difficulty of leading in the virtual space is, I believe, a very central one. Therefore I would like to persevere for a bit longer and bring in the results from my collaborative inquiry group (involving two British, one German and myself as French) which, although they emerged initially from a different perspective, actually arrive at the same conclusions.

### **5.2.2 My co-inquirers' unwillingness to lead**

As mentioned in Chapter 3, I was keen to engage with Barbara, Matthew and Silvia, the members of my collaborative inquiry group, in a truly collaborative way for this research. Therefore for me it was important that we would lead the process in turn in terms of getting together virtually, preparing our session, leading the session, etc.. I saw my role as setting the stage, agreeing on issues such as confidentiality, the research question and methodology, but beyond that I was planning and hoping that somebody else in the group would take the lead. I suggested this in the second session and to my big surprise, and also admittedly disappointment, my three co-researchers refused to take the lead. I asked why and they answered that they felt leading the session might get in the way of their learning. To some extent I could understand their response - interestingly, more at an instinctive than a rational level - and I decided not to inquire further into it. At my next supervision session with my supervisor and ADOC peers I took the opportunity to tell my story of the collaborative inquiry group, and was encouraged to bring the question back to the group. In the following two sessions I was carried away by the richness of our conversations; I was so excited about the real issues that my co-researchers were bringing into our work that, although I made a note to raise the question as an agenda item beforehand, I never actually asked it. I had an instinct, maybe a fear, that this might change the dynamics in the group, which I perceived as being really good. My co-researchers in the group also confirmed these good dynamics. Nevertheless during the last session I resolved to explore this question with the

group as a way of concluding our reflection on how we felt we worked together, and as a way of learning about virtual leadership directly through our lived experience together. The conversation that my question generated proved again to be a very rich one.

I asked the question in a rather provocative way, talking about 'your unwillingness to lead' and inviting my co-researchers to explain why this was so, and I got the following reactions:

- 1) Silvia: "For me it was pure luxury not to lead, not feeling the responsibility for the facilitation for others in the group because I have enough of this to do in the [Silvia's] team"
- 2) Matthew: "For me it would have changed the nature of the relationship between us in the group. We are a group of equals. This would have changed the nature of interactions between us. This highlights the requirement to think very well how you structure virtual teams"
- 3) Barbara: "I do it every day. This was vacation. One part of not wanting to do it was about wanting to take the time of enjoying you [Ghislaine] and your way of running the sessions. I wanted to see it as learning and not working".

While Barbara's and Silvia's answers were very clear to me, I wanted to inquire further into Matthew's views and asked: "Would it also have changed the nature of the relationships between you if you had gone for a rotating leadership?" Both Matthew and Silvia answered without hesitation: "Yes!". I then went on to ask: "Does this mean that the concept of rotating leadership, or even distributed leadership, doesn't work in the virtual space for you?" Matthew answered: "This is not quite right: we were all leading informally at different parts of the conversations. We all took the leadership". Silvia reacted vividly to this: "Still for me you [Ghislaine] were the formal leader. The overall responsibility for the results of the process was with you. We were 3+1". Barbara was clearly agreeing with Silvia: "This [the fact that you were the 'formal' leader] didn't stop us from leading. We did not lose power. I was expecting for us to be 3+1. This was not a surprise and I am not sure how comfortable it would have left me otherwise".

We then continued to reflect on the nature of the role I took, and underlined the importance for the leader to provide a structure, an agenda, to serve the group, etc.. We can see here a similarity with one outcome brought up in the inquiry strand with

the MilkCo leaders. Suddenly Matthew reacted: "That's a facilitator to me!" To which I responded by asking: "And how does this sit with you, Matthew, and the way you see yourself when you lead your Indian team virtually?" Matthew answered: "That's absolutely fine for me because I see my job as facilitating for others to do their job. You need to take more care about it in the virtual space. You need to have the skill set. Call it what you want: facilitating, facilitative leadership ...".

Silvia very much agreed with Matthew, and at the same time underlined that this concept of the facilitation in the virtual space would need to also include the notion of responsibility for the results, and cannot only imply the more traditional concept of process facilitation. Matthew and Silvia then got into synch by claiming: "This is a responsible facilitator [what we had in mind]". Barbara, who had been quieter in the background, joined in: "I see a need to be extra mindful. Are you leading, are you facilitating? [...] In my job I need to do both. Virtually the need to facilitate is even heavier, clearer".

Having listened carefully to the recording and tried to represent the flow of conversations and reflection of the four of us, I am struck by two aspects: Matthew came very naturally to the concept of facilitator as we were reflecting on the leadership in our inquiry group, and automatically saw this concept applying also to his role in the virtual space... as did Silvia and Barbara. This seems to be in strong correlation with what emerged from my inquiry with MilkCo. I also want to uphold the concept of 'the responsible facilitator' which I find helpful, in the sense that the facilitator not only holds the responsibility for the process but also for the results and decisions s/he might take.

For Silvia and Barbara, leading in our group would have been an additional load that they didn't want to take on, as they preferred to learn from our process and enjoy it. I see a parallel with my inquiry with the MilkCo managers, as for most of them leading in the virtual space was a task that nobody really wanted to take on. In the case of MilkCo I interpreted the reason to be mainly linked with the fact that they didn't really know what leading virtually meant. However Barbara and Silvia were experienced, yet deliberately chose not to take the job, because it would have meant more work, more effort, more responsibility. In other words I see an emerging pattern (common for MilkCo and my inquiry group) that the art of leading virtually is a difficult one and hard work, requiring lots of effort, care and attention. In one of the previous sessions Matthew was explaining why in his view there are still

so few people who really lead virtually and why so many others are still dependent on the face-to-face: “Unless you put a lot of effort into it, the difference of outcomes with the face-to-face is no comparison”.

Finally I also want to notice and underline the dance between the words that my co-inquirers were using and how often they moved from *leading* to *facilitating* and from *facilitating* to *leading* revealing some kind of shifting concept in their mind.

### **5.2.3 William’s emerging new leadership**

Looking at my ‘coachee-researchers’, William’s example also seems to be pointing in the direction of the leader acting as facilitator as well, although William never used the word ‘facilitator’ as such, and I never prompted him to comment on this notion. Nevertheless the list of activities that William undertook would certainly account for a leader responsible for achieving results as well as facilitating virtual meetings and actually also ‘designing’ them. In our sessions, as a way to help him reflect on his progress and learning, I always asked him to tell me his activities and to describe his virtual meetings. William often organised, for example, virtual town halls, using a mixture of people face-to-face and connected via screens across the plants (not with cameras, but a screen showing information, pictures, etc.). He also organised purely virtual meetings with his team, as well as virtual action learning sessions with his direct reports as a way to encourage learning from each other across the plants. While he still saw his responsibility to be about commenting on the results and current developments in the organisation, setting goals and reaffirming the vision for his department, he would also in the virtual space pay minute attention to questions such as:

- Should I be alone and linked into the plants only virtually or should I be with one group in one plant and rotate between the plants?
- Should I be together with my management team or should each member of my management team be in a separate location?
- How much information should I share?
- Which process should I select to invite questions? Who would be best placed to answer these, and how?
- How shall I create a feeling of community across the plants?
- What symbols would be important to me?

In each of our virtual sessions William would spend a substantial amount of time telling me what he did, what he learnt, what he thought of doing differently next time. In his activities as a virtual leader he also engaged one member of his team, Maria, who had expertise in communication, asking her to develop with him the plan for the next virtual event. He relentlessly experimented with the questions above and slowly defined his own way to lead his team virtually. Once in the summer of 2009 William told me that he was 'punished' (his word) for not having prepared well enough for a virtual meeting. Prior to the virtual town hall he had asked his team members to send him a list of their achievements throughout the year so far. He explained to me that his aim was to acknowledge and thank everybody for their contribution, in spite of an extremely difficult situation in the organisation, but that he wanted to do this by putting the emphasis on team achievement rather than individuals. Hence he chose to show a bunch of flowers where each flower, linked to a list of the achievements of an individual, would be pretty but would become even more beautiful in the context of the bunch. William felt very disappointed: "People didn't get it. They all looked for what they did individually. I was lacking the WE. I realised that I didn't spend enough time preparing for this meeting, the choice of messages and how I wanted to engage my team". We both discussed what exacting preparation this type of virtual meeting would require: William felt that he needed much more care, detailed thinking and focus for the preparation of virtual meetings than for face-to-face. I wonder whether this attempt of William's could be positioned as an example of 'practical authoring' in the virtual space (Shotter, 1993) described in Section 2.2.3: William was making an effort to convey some interpretations (verbal and visual) of a reality that he wanted to engage his team with further. In this respect I find Shotter and Cunliffe's (2003) description helpful:

"More than just "giving us a picture" – which lies dead on the page- the good author manager can bring us to experience a *living reality* (sic), a dynamic landscape, which spontaneously offers us a set of "action guiding advisories", a "shaped and vectored sense" of where we are now and where we might go next. [...] Managers can be seen, then, as creating in concert with those around them, new possibilities within which both they and others can live and work." (Idem, 2003, p.20)

However one possible reason why William felt that he failed was perhaps not so much that he did not prepare well enough, but much more that his attempt to create meaning ('the concert') with his team members was not done in a way that was

sufficiently relationally responsive, and he could not engage his team members in that moment of meaning-making to the degree he wanted. Was he too impatient?

However, William was happy with another experiment. As another way to celebrate achievements he had organised for similar cakes to be delivered at the same time in all the plants that were connected virtually. William said that this was a great success and he felt that people connected emotionally with each other across geographies when eating the cake together across the plants. I could feel that William was really pleased with himself. Several tones were dancing in his voice. The rhythm of his words was light and sustained. I asked him: “Do you have a sense of why this cake made such a difference?”. He was not sure. Listening to him I had the clear sense of a moment of communion that William had been facilitating across geographies. I shared this thought with him and his reaction was: “You must be right. This was exactly how it felt. A real moment of sharing and being together!”. I was absolutely delighted because William told me that now he was really feeling that his own role and style of leading virtually were becoming clear to him: the use of music (see Section 5.1.1) to create a common emotional platform across the plants had become a fact of life for all in the team: “It was funny at the beginning; now we don’t question it any longer”, and now he was developing his own ideas and experimenting with them.

Behind all this minute thinking and planning William had been very clear since early 2008 that he wanted to create a community of learning and best practice across the six different plants in spite of, or because of, their remoteness. All this time he had been reflecting with me on his role in doing this. When we talked in the summer of 2009 he was not only happy but proud. He had just received the results of the annual employee survey: he got the best results. His direct reports and the second line gave 82% level of satisfaction with William’s communication and leadership as opposed to his peers, the next one of whom got 75%. In spite of leading his team mostly virtually, William got better results than his colleagues who led their teams predominantly face-to-face. However, William mentioned the shadow side of these fantastic results: at the next level down in the organisation William got only 65% as opposed to the average of his peers at around 75%. William explained to me that these results showed that while, despite leading virtually, he got far better results from his direct reports, he had neglected the levels further down and organisation. He shared his frustration: “I want to engage my direct reports and the second line more in leading their own teams virtually, but this is really hard work”.



Over a period of almost a year (as mentioned) William had been facilitating virtual action learning sessions with his management, hoping that they would in turn bring this way of working and learning together further into the organisation. However, with the exception of two managers in his team, the others had not been proactive so far. William was now exploring with me what he could do to create this virtual community of learning as best practice across the plants. He then expressed the following: "I feel that I am working on my own [at leading virtually]. It feels like a dark cloud". William said that he only had the support of Maria, his assistant with communication expertise, in his efforts. I asked him what he expected from his direct reports and the next line exactly: "I want them to organise their virtual action learning sessions with their teams and spread this way of working across the organisation; I want them to work out with their teams the concrete details of what can be done virtually and what needs to be done face-to-face further on; I want them to rethink the role of the hub managers in the plants in this context and to give more autonomy and a stronger positioning to this role". I then asked him how he would like to achieve this and he answered with no hesitation that he wanted to have his managers 'trained' in virtual communication. William was clear, however, that there were currently no resources in the organisation to pay for an external coach. But at this stage William said something that felt really important to me - and I think was also important for him to hear from himself: "For me it is now about moving up the scale. I feel ready for a coaching role [he was planning to help his management team to become virtual leaders by coaching them]. I do think things over, I am on a steep learning curve but I am ready to enable my managers to lead virtually now. It is now my own thing. I forget now that our work together is also for your doctorate". At the end of our conversation I genuinely felt a huge sense of happiness and satisfaction: William was really becoming the virtual leader that he wanted to become. That was his own thing now and he was going with it.

Reflecting on the role that William had been shaping since early 2008 for himself, I would argue that he was combining his role of traditional leader (as the one following up on results, giving goals, setting a direction, etc) with the role of a facilitator of communication and learning across geographies (by minutely choosing his media, messages and communication processes) and the role of a coach. Although he never framed his role in this way, I would argue that this was very much what he had been experimenting with. For him leading and facilitating would not be an either/or, it would not be a simple combination either in the sense of 1+1, but

more a specific mixture (his mixture) or a different new category of leading. At the same time I could not refrain from noticing the 'dark cloud': his loneliness in pioneering this way of working in an organisation which, from tradition and through the type of products that they make and sell, is so bound up in the face-to-face. William is truly a conqueror of the virtual space!

#### **5.2.4 Silvia's virtual leadership role**

Another interesting example of virtual leading is that of Silvia. She had shared her view of her role as a facilitator in the context of the collaborative inquiry group, but I was keen to hear about it in more detail in the context of my coaching work with her. Instead of discussing this aspect further with her on a one-to-one basis, I asked whether we could have a teleconference with one member or several members of her Chinese team, and reflect about her role together. To my surprise she readily accepted this idea, seeing it as a real opportunity to consolidate learning for her and for her team. She suggested that we talked to F, a member of the Chinese team who was more senior than the others, because she felt that F would be more reflexive, and discussing these abstract aspects of leadership might be easier for him than for his colleagues. I agreed carefully with her upon the positioning of the teleconference as a way to reflect on what makes effective virtual leadership in their team, both in the context of my research and also in the hope that it would help the team, and crafted an invitation email to F which I checked with Silvia. F, a Chinese who had never worked abroad, had prepared himself very thoroughly for the teleconference. This made it in some aspects more difficult for Silvia and me to get into a real inquiry mode, as he was coming with well thought through answers. I decided to go with the flow. F's opinion about what made the virtual team successful was pretty clear: "There should be no leader. Everybody's voice is equal. Silvia is a good listener. She is holding the meeting. She is not the formal leader. It really needs effort". He then made another very important point when I asked him why he felt that this required effort. He mentioned that the concept of a team with no formal leader did not correspond to the Chinese leadership and management culture in his team, but nevertheless he felt it was absolutely key that in order for a leader to lead effectively virtually they needed to act as a good facilitator/enabler/convenor, even in a culture tending to be hierarchical<sup>13</sup>. Here I

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<sup>13</sup> F's statement regarding the leadership culture in China corresponds to what can be read in the interesting research by Cheng et al. (2004), who explore the concept of "Paternalistic Leadership" consisting of the following three elements: benevolence, morality and

must note that these words (facilitator/enable/convenor) were not his. These are mine attempting to describe the role he was conveying.

**Proposition 6: Leading effectively virtually requires one (or several) people to feel responsible for leading. In the virtual space this also means facilitating in a wide and complex sense, paying as much attention to the process as the content, making process and content become even more the same thing. It also includes highly conscious choices regarding the medium to use and how to use it. This in turn requires skills and competences that need to be taught and developed in people.**

### **5.2.5 Summary of my findings regarding the role of the virtual leader**

The results shown in this section indicate that the boundaries between leading and facilitating are blurred when it comes to leading effectively virtually. Furthermore even the concept of facilitation itself does not necessarily correspond to what I could call the traditional understanding of facilitation, in the sense of focusing on the process of an event and enabling others to have the conversations that they need to have. It seems that facilitation in the virtual space might become more complex and involve detailed thinking about communication, choices of media, and working simultaneously on different levels, eg chatting with people while asking questions in the virtual plenary, and co-creating documents on the virtual platform. In other words even the definition of the leader as an enabler, as mentioned in Chapter 2 (Katzenbach and Smith, 1993), would not sufficiently cover the complexity of activities and competences needed and described in this chapter.

Stacey's (1992) and Griffin's (2002) concept of self-organising teams, in which the individual leader emerges depending on his/her capability to deal with complexity and uncertainty, the on-going purpose and the task at hand, does not seem to be sufficient, as it misses the point of altogether new competencies being needed. I would argue that the question as to whether a team can self-organise virtually is very important and cannot be answered easily. Actually the examples above might hint at a negative answer to the question. There is a real need for dedicated leadership in the virtual space and this cannot be left to emergence.

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authoritarianism. Cheng et al explain that authoritarianism still exist in China but is in the process of disappearing in the light of modernisation.

It seems to me that there is a new category of intervention emerging in the virtual space, something that goes beyond a mere hybrid between leading and facilitating, requiring new awareness, new skills and competences, and going far beyond the mere capacity to deal with a new communication technology.

I welcome the ideas and the work of Zhang and Fjermestad (2006), who advocate more systematic research into virtual leadership, and show how a combination of the leadership traits theory and the contingency theory might lead to a useful model to define a virtual leadership competencies framework, including communication competency, environmental alertness and influencing power. However, I would advocate that this model might not do justice to the complexity of the picture emerging from my research. For example the concept of facilitation is totally missing. Furthermore the concept of 'influence power' does not necessarily correspond to what my co-researchers and myself found out. I will come back to it in Chapter 5.3.

I would apply the same caution to the claim of Joshi, Lazarova and Liao (2009) that inspirational leadership plays a crucial role in dispersed teams. I very much welcome their critical questioning of the frequently advocated concept of self-managed teams in the virtual space, and while I also think that their advocacy for the training of virtual leaders on the basis of a set of competencies specifying and associating behaviours and inspirational leadership might be a very useful start, it might not suffice in equipping leaders to lead effectively virtually.

My own claim at this stage is that effective virtual leadership requires a much more fundamental questioning of basics in terms of 'who I am' as a virtual leader and how I relate to others and the world (as shown particularly in Section 5.1 and articulated in Proposition 1), as well as the willingness to go beyond the existing categories and leadership frameworks developed from within a predominantly face-to-face paradigm.

It seems to me that leading in the virtual space requires from the leader that s/he makes it easy for the team members to engage with each other and to find new ways of relating with one another, given that the virtual space presents new parameters in terms of 'presence', 'here and now'. This would correspond to the notion of 'facilitation' in its original sense, namely from the Latin 'facilis' (easy) or the

French 'faciliter' (to render easy)<sup>14</sup>. It is as if the leader has to **facil**-itate to enable others to relate and connect in this new space, and to lead at the same time by giving directions: the virtual leader as a '**facile**leader'?

My advocacy would be to take the encouragement of Watzlawick et al (1974) to reframe our views, potentially into newly emerging categories, instead of making laborious efforts to 'squeeze' the study of virtual leadership into existing ones. Watzlawick et al present this 'gentle art of reframing' as an 'effective tool of change': "What makes reframing such an effective tool of change is that once we do perceive the alternative class membership(s) we cannot easily go back to the trap and the anguish of a former view of `reality`." (Idem, p.99). I hope that in this section I have been able to invite my leaders-readers to step off the road well travelled and to develop the appetite, albeit also the anxiety, to enter onto a new path of leading and to live the critical questions expressed here.

I will now share further results of my research on virtual leadership in the next sections.

### **5.3 When trust becomes power and power gets in the way of trust**

I have dedicated this section to the topics of trust and power. As mentioned in Chapter 4, I have had an ongoing tension regarding both topics. As shown on the table in Section 3.6 I finally decided to focus all my energy on the question "What does it take to lead effectively virtually?", but nevertheless to keep an eye open for both topics and to notice when and how they emerged. One reason for my co-researchers' and my caution about focusing too soon on these categories might have been the intuition that both of these categories might actually be shifting in the virtual space (in a similar way to leading and facilitating).

I hope that this section will show how, instead of us looking for both topics in our findings, they came to us through our stories in a form that showed blurred boundaries between them.

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<sup>14</sup> To facilitate: 1610s, from Fr. *faciliter* "to render easy," from L. *facilis* "easy" (see [facile](#)). Related: *Facilitated*; *facilitates*; *facilitating*. <http://www.etymonline.com> Online Etymology Dictionary

### 5.3.1 When trust becomes power

In the second session of our collaborative inquiry group, Matthew shared with us an interesting challenge that turned out to be a fascinating story for our learning. I will share his story in the following paragraph.

Matthew explained that in the context of his role as Accounting Director he needed to develop a new accounting standard for the group across India, Europe and the US. He was currently facing what felt like a tough issue with the Indian team with whom he is working virtually. Matthew is a very experienced virtual leader and has been leading virtually for several years. In spite of his experience he explained that in this particular case: “We talk a lot about the same issue and still it is very hard to ensure sufficient clarity and agree on what is required. [...] Although I do have many of tools and methods to make this happen it doesn’t happen. The methods that I have always used in the past are not working. Sometimes I feel that we are clear (finally!) about the issue after a virtual meeting; then two weeks later I find out that there is no clear shared understanding”. Barbara asked him: “What is it that you are trying to achieve?”. Matthew answered: “It is truly about co-creating something that needs to be accepted locally at the subsidiary level and at the global level of the whole organisation”.

At this stage the whole group was working with Matthew in an action learning format, trying to help him to develop a different perspective on the issue. We explored with him the degree of complexity of the task; we also explored with him the type of leadership which he thought might be needed to achieve the task; we then went on to look at the cross-cultural challenges involved, as Matthew implemented new accounting standards across the US, Europe and India. The more we explored the different aspects of the issue at hand, the clearer it became to me that Matthew had not only thought about all the issues but had also acted on them, unfortunately with no results. In spite of his calm, always composed manner, Matthew’s frustration and near despair were resonating through the virtual space: “This is one of the most difficult challenges I have ever had in my leadership [...] not being able to understand what is required is frustrating”. At this stage I felt that Barbara, Silvia and I were sharing the same sense of despair, as we were not sure how we could help any longer. The silence between us felt very full and heavy.

One of the aspects that remained unclear for me and that sounded like an avenue that Matthew had maybe not explored was how the Indian team felt about the task, and how much time they had taken to discuss the ways they wanted to work together with Matthew in the virtual space. From my previous experience of working virtually, as well as from several conversations I had at the start of my inquiry with colleagues and leaders, I believe that agreeing about the ways to work together is particularly important in the virtual space. Therefore I offered the question to Matthew, who became silent for a short while and then admitted that he had not taken the time to explore this. We discussed these two aspects (the team feelings about the task and the potential discussion about ways of working together) for a while and I could feel that Matthew was relaxing a bit and generating new energy. At the end of his slot, I asked him what he was going to do and he explained that he wanted to focus even more on the relationship with the team in India, and that he would start exploring some of the aspects linked to it with his main counterpart in the Indian organisation.

At the next session we were all keen to find out what happened to Matthew and his issue. So as soon as we had reconnected with each other and completed our focus exercise Matthew was asked to update the group. He shared the most amazing news with us. He did talk to his counterpart, also part of the team, about the relationship that he had with the team in India: "We talked through the nature of the relationship aspects that we had and hadn't clarified". One of the key points emerging from the conversations that Matthew had subsequently was that the team was used to speaking a technical, more academic accounting language, and that Matthew's interactions with them in a more generalist language were getting in the way. Matthew explained to us how surprising this was to him, and what a change it has meant for him, as so far he had been working in an organisational culture which banned any jargon so that he had become thoroughly used to talking a generalist language. He carried on explaining: "At the next meeting I put all the jargon back, all the technical terminology and the accounting standards, the specific technical references. You could hear during the course of the meeting how the nature of the questions changed, the level of confidence and consensus raised. It was fundamentally different". Exploring the issue a bit more with us Matthew came to the realisation that the reason he could not develop a lasting shared understanding with the team about what needed to be done was very probably linked to the fact that the team was unsure as to whether they could trust Matthew's expertise, as he was speaking a language with them that would not reassure them. They had the

need to speak technical language with him to reassure themselves that Matthew knew what he was doing, and very probably also to understand Matthew better.

The conclusion we came to was that the only way Matthew could build trust with that team was through his use of the technical language. Barbara and I (Silvia didn't attend this session) were absolutely baffled: neither of us was expecting that the use of technical language could make such a difference and un-stick the team the way it did. Also I was noticing for myself how my understanding of trust was implicitly shifting: here it was not about purely relational aspects; the critical first step was about establishing one's credibility by speaking the same language, saying "I am one of you". In retrospect I would actually even expand this further and argue that even technical language is a way of relating with others to build rapport and relationships.

During the session with Matthew and Barbara we reflected further together and we arrived at three key learnings from Matthew's case:

- 1) While as a group we had decided not to look specifically into the role of trust in effective virtual leadership, we were almost amused at the realisation that one of the first issues and learnings explored in our collaborative group was precisely all about trust. Matthew said: "It was very insightful for me that it actually came back to the topics that we said are not that important, namely trust and power. It turned out that in that context it was a trust issue".
- 2) I was dismayed that if Matthew had explored with the Indian team the question of how they felt about the task, an action I had implicitly suggested, he could possibly have put himself into an even more difficult situation, since what the team needed was not a conversation about feelings but much more a sense of clarity, structure and expertise through the use of appropriate language.
- 3) The challenge that Matthew had to overcome in terms of adapting to the language and expectations of the Indian team while he was working virtually with them made clear to us the level of versatility that he needed to demonstrate. At the end of the day he would have to speak the generalist language with his mother company in the UK as well as when working virtually with his team in the US, but 20 minutes later he would need to



switch swiftly to a different language and ways of interacting for a virtual meeting with his Indian colleagues. As Barbara mentioned, leaders always have to be versatile in the way they speak and interact with employees, the Board, the shareholders; however, what became very clear to us was that the level of versatility in terms of speed of adaptation is much higher in the virtual space. In other words, one of the key aspects of effective leadership that Binney et al (2005) mentioned regarding the traditional leadership paradigm, namely 'working with the context' becomes stretched exponentially in the virtual space. As already mentioned, Zhang and Fjermestad (2006), who developed a conceptual model regarding virtual leadership combining Leadership Trait Theory and Contingency Theory, also present what they called 'environmental alertness' as one of the three key leadership traits in a virtual team context. While my view is that this trait in itself is important, I believe it only represents half of the story: the versatility and aptitude to adapt **fast**, sometimes within one hour, to different contexts virtually seems to me to be if not the most critical aspect, at least as critical as the alertness in itself.

I hope that Matthew's story above also provides a lively and useful example of the dependence of power on trust in the virtual space: if Matthew had not managed to really understand what he needed to do to develop the trust between himself and his team in India, he would not have had any power as he would not have managed to achieve the task that needed to be completed.

### **5.3.2 When power gets in the way of trust**

We have seen in the previous section that power depends on the way one manages to develop trust in the virtual space. In this section we will explore how another form of power might get in the way of trust and destroy it.

In the following collaborative inquiry group session Barbara talked about her challenge, which quickly proved to be about power. She described the sense of failure that she had because she reached a situation where she needed to use her position, CEO of the organisation, to make things happen with her team in India. She said: "In terms of getting what I needed, it worked, but it felt like reverting to the use of power [...] I feel that the fact that I used my power has affected the nature of my relationship with the team in India". "How do you know?" asked Matthew. "They

communicate less, they share less what is going on as a way to regain their power”, answered Barbara.

Our work with Barbara continued, and we explored the difference between what Barbara herself called ‘earned power’, the power that one gains through one’s interaction with people and one’s behaviour, and ‘received power’ generally known as positional power. This exploration of the topic with Barbara stretched over several consecutive sessions. Then in the fourth session a real breakthrough came about, not only for Barbara but for the four of us. Barbara explained: “What I have become increasingly aware of since I have joined this process [our collaborative inquiry] is how much I need to hold my power lightly if I really want to work well in the virtual space in India and Africa and be an effective virtual leader. If I use my [positional] power I get the answers that people think I want to hear. This might help me in the short term, but then if I go there I realise that things are not necessarily what I was told they were. They reward you with what they think you want to hear. [...] I realise how important it is to give up quite a lot of the power you have been given by the structure [...] This has been really illuminating to me while I have been in this process”. Barbara went on to underline how much she believed that as a virtual leader one has to give up one’s authority, so that it doesn’t get in the way of what she called real relationships, real exploration and real partnerships.

At this stage I tried to link Barbara’s learning with a discussion we had in the second session when we explored Silvia’s struggle in establishing her power in the context of her international key account team, where she had no positional power because no clear reporting structure existed. In that session we discussed how much she needed to invest time and effort into the relationship-building in order to make things happen. With Barbara we were discovering that when there is a clear reporting structure in place (the Indian team was clearly reporting to her) this positional power might actually become powerlessness in the virtual space, because it gets amplified there, becoming much stronger. Barbara added: “Indeed every time I have been seduced into trying to use my positional power, this got amplified and my relationship with the team got damaged”. “Hence you lose the trust of your team, don’t you?” I asked. “Indeed! And then you need to use even more of your hierarchical power! It is a double bind!” Barbara answered. “On the other hand, if you don’t use your hierarchical power, then you gain trust from your team and trust becomes the real power that you need”. We all agreed with this conclusion. I could feel a real sense of truth in terms of what we were getting at; it was our truth of what

seemed to make powerful relationships in the virtual space. I was also realising how much the boundaries between trust and power, as one might define them in the traditional working and leadership paradigm, were becoming blurred, and how interdependent trust and power could be in the virtual space.

From my research about trust and power in the traditional management and leadership paradigm, it seems that the two concepts are not usually put in interdependency, or even in relation to each other, at the level of personal relationships. When they are, it is more in the context of co-operation between organisations or trans-organisational relationships at the organisational level, where compliance and interdependence play a role (Bachman, 2001 and 2006).

A further interesting insight for me and for Silvia came with her realisation of how her view of her own power had shifted through the process of our collaborative inquiry: "At the time that was the only way for me [to get power] by having more info [knowing more that my team members]. This gave me the right to say 'I lead'. I now want to question that". She went on to explain how the sense of her power had shifted and how she now thought that it was more related to the overall responsibility for the process: "My power might really be more about taking responsibility for the overall process and the results". Based on my personal experience of leading virtually and also linked to the emerging outcomes of the MilkCo interviews, I agree with her that power in the virtual space is not necessarily about knowledge but is more linked to the way one interacts with others and leads the process. From Silvia's insight, linked with the previous reflection on power related to Barbara's issue, an interesting image of power in the virtual space emerges: it seems that real power comes from hard work in establishing strong and trustful relationships and from leading a process that brings results and for which the leader takes responsibility. I am left with the image of a virtual leader as a trust builder.

At this stage it is interesting to notice that these findings are different from those of Panteli (2005) who, having studied empirically the development of eighteen teams in the same IT organisation for two months, came to the conclusion that power is generated by knowledge: "Several interviewees described the power within their team as originating from knowledge and noted that at any given point in time the most powerful was the individual with the most relevant information" (Panteli, 2005, no page number available). One reason for this difference of findings might be linked to the fact that Panteli (2005) seems to have studied the teams mainly in the

asynchronous mode, while the considerations of our collaborative inquiry group, as well as the interviews with MilkCo, were based to a large extent on the synchronous mode. So far no comparative study seems to exist between the synchronous and the asynchronous mode in terms of power generation, hence it will be difficult to argue further in this direction. Thus this hypothesis must be more a question at this stage.

However, Panteli (2005) also comes to the conclusion that the use of hierarchical power in the form of coercive power negatively affects the development of trust. In her comparison of what she calls 'high trust global virtual teams' and 'low trust virtual teams' she notices that the 'high trust' teams used a facilitator who would pay great attention to the power dynamics in the team and to building trust, as opposed to the 'low trust' teams who would not use any facilitator.

### **5.3.3 The further multiple facets of trust and power in the virtual space**

Having illustrated how the categories of trust and power might be shifting and connecting with each other in the virtual space, I will now share further views on trust and power in the virtual space by tapping into different inquiry strands.

#### **5.3.3.1 Trust for MilkCo's leaders**

As I have mentioned, my intention throughout the MilkCo inquiry, and throughout my ADOC inquiry, was not to dive deep into the topics of trust and power as subjects in their own right, but more to look at these two specific concepts and reflect on what they mean in the context of leading virtually. Several authors such as Handy (1995), Jarvenpaa et al (1998), Lipnack and Stamps (1997), Hoefling (2001), Gibson and Cohen (2003), Pauleen (2003), Kirkman et al (2004), Hertel et al (2005) underline how critical trust is for teams to succeed in the virtual space.

Luhman (1973) underlines the importance of trust (in traditional leadership) particularly in complex and uncertain situations. I would argue - and several interviewees mentioned this - that the MilkCo teams started their work on the basis of a very unclear and complex question of what they needed to deliver. Hence Luhman's statement seems to be particularly relevant: for him trust begins where knowledge ends, it provides a reliable basis, namely the reliance on each other's actions and behaviours and thus one predictable parameter, in a complex gathering

of uncertainties, unknown parameters and threats to cognitive solutions. Often trust is described as the 'glue' of virtual teams, for example see O'Hara-Devereaux and Johansen (1994, p. 243).

Remdisch (2006) recommends face-to-face meetings between team members of virtual teams to develop trust; no wonder; she only asks leaders for their point of view, which I think is the inherent problem with interviews if they are not combined with experimentation and reflection. My work with clients in the virtual space so far - in over 80% of the cases I never meet my clients face-to-face - regularly shows that at the start of our work people don't feel that they can trust each other if they have not met face-to-face previously. After we have run one or two sessions with them, they change their point of view. I will come back to this point later in this section.

However, the research into trust in virtual teams has evolved a lot over time. While people such as Handy (1995) or Lipnack and Stamps (1997) clearly advocate like Remdisch the need for face-to-face interactions to enable a virtual team to perform well virtually afterwards, others, for example Kirkman et al (2002) question this conventional thinking about trust in the virtual space and claim that face-to-face is not mandatory for a virtual team to perform well. Wilson et al (2006) compared the development of trust in 52 teams, some being dispersed teams and others face-to-face, over a three-week period; as a result they go against the dominant perspective and claim that trust in distributed teams develops in the same way as it does in co-located teams, only with the exception that it takes longer to develop because it requires more time for members of those teams to exchange social information. Others such as Oshri et al (2008) actually go so far as to claim that face-to-face meetings can be counter-productive for globally dispersed teams, as they are very time bound, can seldom be attended by all members of the virtual team in question, and cannot provide the long-term support required for the members' socialisation (Oshri et al base their view also on Furst et al, 2004).

The MilkCo interviewees' views on trust in their virtual teams would certainly support Kirkman's views. At least seven people were very clear about what constituted trust in their teams:

- “Trust is when people know what they are doing. I don’t need to know the people involved in the process. For example I didn’t know M before. M did a lot of preparation work. I was impressed by him and he gained my trust.”
- “Trust was there among almost all people. Apart from Z - he didn’t give us his time. We didn’t confront him because we had sympathy for his struggle. Trust was among all others. I felt that they really wanted us to make progress.”
- “We all were excited about the subject. Everybody got involved and contributed. This is key for trust. If I had seen somebody not contributing, I would have lost my trust [...] Indeed knowing each other before is less important. The other ingredients such as contributing, listening well are much more important.”
- “I didn’t know K before. Nevertheless I trusted him. He was competent, a good professional MD. You develop trust with one person or you don’t. I did trust K even if I didn’t know him.”
- “Trust is about knowing each other’s capability, delivering what we promised. Trust was growing as a result. Also working together increased the trust level. Respect also increased. All were on time. Nobody let the others down.”
- “Trust is about being there when the meeting starts. It is a simple thing but a key one.”
- “I trust people who have concern for the quality of the work produced in the group, people who have concern about the active participation of all. I tend to discredit people with their own agenda. When I felt that people had worked, had well prepared, were eager to contribute, then I was more prone to trust them.”

As mentioned three interviewees were still claiming that face-to-face was important for trust to develop. In two cases the interviewees presented it as a sine qua non; in the third case the interviewee felt that a face-to-face meeting up front did help the trust to develop.

I also had an interesting conversation with a further interviewee. When I asked him about trust he answered that there was trust in their team because they knew each other before. He underlined the importance of the face-to-face prior to virtual working for trust to develop. Subsequently he happened to tell me the story of a lady with whom he had been working virtually for a while without having met her

face-to-face. He then told me that he trusted her a lot. When I asked him why, he answered: “She was summarising what she heard and checked for any misunderstanding. I felt listened to. I could sign off with no problem what we had discussed and decided”. My interviewee then paused and noted how his views on trust had been changing in the course of our conversation: “Now I have another answer!”. I am keen to mention this story because this pattern of reflection and thinking about trust in the virtual space corresponds to a lot of other experiences that I had from talking to leaders and managers in different contexts. It seems to me that there is still a deeply embedded view that face-to-face is absolutely necessary to build trust in virtual teams (see Remdisch’s reported views mentioned above in this section). However when leaders start experiencing virtual working and are prepared to reflect on it, their view changes rapidly. There seems to be a parallel process with the literature about trust in the virtual space, the development of which I was mentioning earlier on.

Three further interviewees were in full agreement with the notion of reliability and credibility, as well as the notion of wanting the whole team to succeed and not pushing individual agendas through, but they added a more subtle aspect regarding trust in the virtual space:

- “Trust is a stomach feeling. It is about the way people answer. It is about intuition. You feel it. You don’t need to have the body language to feel it. It is about the contents of the answers, the way people get involved. I can feel it over the phone.”
- “I have no need to see the person. I can lead people without seeing them. It is a personal thing, not a cultural one.” [I had asked Q whether it was a cultural thing as he was Indian.]
- Z told the story of a person he was working with at the moment [outside the ‘virtual strategy process’]: “His world tells him not to trust me and vice versa”. “However we have found a good way to trust each other. I like to listen to the energy level in people’s voices. If this fits with what they say, with their choice of words, and if their voice is clear, then I trust them. If there is a mismatch then I tend to distrust them”. At this stage I should mention that Z is maybe the most experienced one in the MilkCo group when it comes to working and leading virtually: he has done this for several years with people ranging from South America to the United States and Europe.

I am very impressed by the subtlety of the reflection of the last interviewee, and I can relate very strongly to his views and experience of trust in the virtual space. His views underline the importance of listening in a specific way (see Section 5.1.3). I also want to uphold the notion of trusting your intuition when you work virtually, as mentioned by one interviewee. This is confirmed by Charles Caldwell (2004) who speaks of the 'Virtual Management Intuition'. In my own experience the more I work with the awareness of my body, the clearer I become about my 'gut' feeling, and I have been learning to use this 'data' with good results. Caldwell (2004) unfortunately doesn't expand much on his idea of 'Virtual Management Intuition' but he does raise the question of how one develops it. For the purpose of this paper I would also like to offer the question ...

**Question for further research: The concept of management intuition seems to be particularly relevant in the context of virtual leadership and deserves some dedicated research, not only in relation to trust in the virtual space but also in relation to leading virtually in general. How can a leader develop and use his management intuition in the virtual space?**

### **5.3.3.2 Trust in our collaborative inquiry group**

From the beginning of our work together in the collaborative inquiry group to the end, I had been journaling and taking personal notes about how I was experiencing us as a group. Building on my previous experience of the importance of developing good relationships in a virtual team before doing anything else, we had spent most of the first session talking about ourselves, our interest and motivations for joining the group. I had personally paid careful attention to explaining to the group how I knew each member, and my story with each of them, particularly because I was the one bringing all four together (as mentioned none of them had actually met face-to-face before). We then went on to explore our research question and agree how we would work together. By the time we had finalised this the session was over, to Silvia's disappointment because she had wanted to start 'work', meaning the exploration of our question. However the development of our group proved that this investment in the relationship and setting the stage in the first session was time very well spent.



After the first session I was positively and recurrently surprised about how quickly the group came together. Although I was feeling reconfirmed in my hunch - also based on my experience so far of working with previous groups virtually - that trust can develop fast without having people meet face-to-face first, I was still surprised about that: it was as if I needed to surprise myself several times in a row to finally believe it! In my journal there are several sentences like: "There are only ten minutes that we speak together and the group feels already so intimate and trustful". I noticed this at every session. At regular intervals I also invited the group to reflect on how we were working and feeling together, and I also shared what I was noticing, wanting to cross-check this with my co-researchers.

The trust we were noticing could be described with several labels:

### ***Low risk environment***

Matthew explained that there was a lot of trust amongst us because it was 'a very low risk environment, a very appetising environment for me'. Silvia agreed with this and added: 'You are in a neutral environment. You don't have to look strong. You are not being judged'.

### ***I trust my friend's friends***

Silvia also added something that I found really helpful: "I trusted you [Ghislaine] and I know that you trust the others so I trusted them as well until they would prove un-trustful. For me it was right from the start. I have never experienced that before". This statement is particularly interesting if one remembers that Silvia and I actually never met face-to-face before.

### ***Common interests and self-interest***

Several times also the group underlined the commonality of their/our interest as being a strong driver for the trust among us. In the last session Barbara said: "I realised how different our respective contexts were and yet how strongly connected we all felt about virtual leadership despite these differences". Silvia expressed how happy she felt to have finally found somebody in Barbara who understood her issues around building relationships in the virtual space, and how well connected she felt with her.

I noticed that Barbara in particular was specifically underlining the importance of the fact that each of us had our own personal interest in being part of the group, and

how this impacted on the trust in the group. She then reached, in my view, an absolutely critical realisation: “When I work with my virtual team how much do I take the time to understand the nature of our common interest as a team in spite of the time pressure. It is about TAKING [she was really emphasising this] the time to understand the nature of each individual’s interest given their different contexts”. I actually think that this is what we did in our collaborative inquiry group at the beginning: at the expense of Silvia feeling disappointed and impatient at the end of the first session because we had not done any ‘work’ in her view, we did take the time and great care to share our personal interests, and agree on our research question and how we would contribute to it, in the form of a robust psychological contract.

Deep in myself I felt very grateful to Barbara because she had managed to express a real need in leading virtually that I was sensing all the time but could not articulate for myself. In our last session, in an effort to consolidate our findings she further summarised that point as follows: “I wonder whether there is a real need to be aware of other people’s perspective, of what brings them in there and keeps them in there. It is about the need for the virtual leader to understand their self-interest”.

### ***Resonance***

In addition to and in direct relation to the trust among us I was particularly noticing the resonance between us. By ‘resonance’ I mean here the web of strong and unconscious connection between the four of us, as for example Foulkes (1975) would describe in his concept of ‘matrix’ (see Section 2.2.2). As in many of the virtual action learning sets that I have facilitated, here the dance of thinking and feeling together was very strong, and was generating new thinking in a strong feeling of closeness where the sum of our thoughts and feelings was by far superior to the four of us together. Barbara echoed this feeling and explained during the second session: “I strangely feel very connected to you as a team. [although] we have only a loosely connected experience [of leading virtually].”

### 5.3.3.3 Trust for the 'digital natives'

I would like to finish this exploration of the topic of trust in the virtual environment by sharing some results of my research with the 'digital natives' leading to the same patterns of belief that face-to-face is necessary for trust to develop virtually. As mentioned, most of the leaders with no or little experience of leading virtually believe that face-to-face is needed. This seems to be a deeply embedded pattern that only practice and reflexivity can prove wrong.

In spite of the fact that all my young interviewees spend a substantial amount of time communicating virtually, all of them believe that you need to meet the person face-to-face if you are to trust them. They have the belief that seeing the person will enable them to judge whether the person is trustworthy or not because of the eye contact and body language. The really important aspect however is that they also all feel that it is possible to develop a level of trust virtually, without having met the person, that is sufficient to do good work with him or her virtually. Thus the criterion of face-to-face based trust applies only for their private relationships, and they all establish a clear divide between what they need for their private and for their professional relationships in terms of trust. This in my view raises several questions:

- Do they establish this divide because their experience of professional relationships is limited at this stage and they cannot really judge this aspect, or know what is 'good enough' trust? Having said that, the research on trust in the virtual space also conveys the concept of 'swift trust', which has some similarity. The concept of 'swift trust' was developed by Meyerson, Weick and Kramer (1996) and relates to temporary teams (not necessarily virtual) who come together to achieve a specific task and disband after that; it describes the kind of trust necessary for team members to work well together: namely upfront trust, or suspending doubt, and a positive attitude. Meyerson et al (1996), as well as Jarvenpaa and Leidner (1998) who built on this concept for their work on virtual teams, underline the high degree of fragility and temporality of 'swift trust'.

And/or

- Do 'digital natives' have a conception of work that is more transactional than that of people between 40 and 60 years old? If this is the case, what will be the impact of this new expectation on virtual working relationships?

And

- Assuming (and hoping!) that transactional working relationships will not be seen as sufficient in the future, at least to achieve for example strategic or innovative work or to foster learning in virtual organisations, does this mean that virtual leaders will need to make even more effort and be more skilled than now to build and nurture trustful relationships virtually in the future? The 'digital natives' might have a much more open attitude towards virtual working but a more 'functional' attitude towards working relationships.

#### **5.3.3.4 Multi-faceted power for MilkCo leaders**

The MilkCo interviewees found it more difficult to answer the question about power in their virtual teams than the one about trust. The ones who managed to describe their personal experience of power in their virtual teams had two main types of reaction.

For three of them power was about knowledge, expertise and information. M said: "It is about showing that you know what you are talking about, then power is growing". This view corresponds to Panteli's thesis (2005) about power mentioned above. However, the sponsor of the 'virtual strategy process' would refute the theory of virtual power through knowledge: "I felt power a lot. I was owning it. They were putting lots of questions to me. It was about guiding people, giving directions, answering questions. It's not about knowing. It's enough to guide. It is a journey".

For others at MilkCo (a bigger group of eight people) power was more about how people relate and interact with others. This could take several forms and shapes. For example M explained: "Power is not about info or expertise. It is about reiterating, reinforcing, coming back to it if you feel it is important. It is about using your voice, your words in a different way. You need to be convinced yourself and then you need to be versatile and know when to bring which arguments with which timing". For R power was "about listening and really understanding what the person

meant. It is also about listening well to be able to bring up your point in a sharp way at the right time”.

For S, power “is about creating a common objective of wanting to achieve something together. Then you have power - you enthuse them”.

For CH, “Power also comes from the capability to offer structure to others.”

According to MA: “Power is when one contributes in a good way, eg when S presented slides, which were very helpful. She had done something and presented it. It doesn’t come only from speaking. Also when you take notes and share your notes, you influence. It is HOW you contribute, not about your expertise”.

For J, “Power comes from getting feedback on what you are doing, whether you achieve results as a team. It comes also from giving support and enabling others. The expertise might give you the nomination. The power comes through the former aspects”.

Finally there was one more specific view of power, from F: “Power is about mastering the English language, it is about saying more with less. It is about your voice and how you work with it”.

All the quotes and examples shown above seem to be acting as an echo of what came out of the collaborative inquiry group, and illustrate that the power felt in the virtual space is an enabling power, a ‘deserved’ power as opposed to a ‘given’ power generated through one’s position, status, etc.. Indeed one of the most striking aspects was the role of hierarchical power in the virtual space. Most interviewees were very clear that as soon as a person was clearly representing hierarchy and making use of their hierarchical power, trust would be destroyed. People would become more careful and engage less, they would also become more silent. We summarised this as follows: “There is something more egalitarian [in the virtual space] than in face-to-face. Hierarchy does not play a role. However if you play on hierarchy from the start, then it can be devastating”.

I would like to conclude this section simply by underlining the multiple facets of power in the virtual space: for some it is knowledge or expertise, for others it is about helping the team move forward, for others it is about really good listening,

etc.. Do these multiple facets reveal the complexity of power in the virtual space and/or a shifting concept that might actually be difficult to encapsulate in the language of power?

#### **5.3.3.5 Power and control through technology: “He who gets the buttons wins!”**

I would like to finish the exploration of the topic of power in the virtual space by considering how technology might be seen as giving an illusion of control, and therefore power, to the people leading the conversation.

When preparing for the virtual workshop with my ADOC peers, Robert (disguised identity) and I carefully considered what I felt, based on my experience of virtual working with clients so far, were important choices to make. What are the types of ‘privilege’ that we ought to give to the participants: Should they be able to chat privately with each other? Should they be able to use the whiteboards at any time, etc.? (See Appendix 2.). When I work with clients I also pay careful attention to the choices I make, knowing that what the participants can do in the background of the formal process of interaction in the group will have a strong impact on the group, the experience and their engagement in the process. In the case of the ADOC workshop my intention was to create an opportunity for all possible processes of interaction to emerge. I was keen to explore with my peers how we could all engage differently at the same time, and how we would make sense together and develop (or not) a sense of connectedness among ourselves in an environment so different from the one that we were used to (I explored this in Sections 5.1.3 and 5.1.5).

At this stage I want to reflect further about the ‘privileges’ that Robert and I decided to assign to everybody in the group. In themselves the words ‘privileges’ and ‘assign’ have a strong power connotation. I am completely aware of the power that a facilitator and/or a virtual leader has when s/he hosts a session, just through the technology: you can give the power of expression and action to everybody (for example, they can open up a virtual whiteboard, write on it and share this with others while the facilitator explains something else using a set of slides that s/he presents in the same space) but you can equally take it away. After the workshop Mary sent me some feedback by email and, regarding the topic of power, she immediately linked it with the technology and wrote:

“Power is an interesting question...because you opened up the tool set, we could all ‘mess with’ the content, which meant that you were sharing power. Typically, I am in sessions where someone is driving the information and my participation is always a function of the ‘permission’ they provide. [...] He who gets the most buttons wins! [...] You were much more open about sharing, so there was a shared sense of power for me. There were also lots of ways to get your attention, ie, I could press a button or send you a note, so if I felt the need to have my voice heard, I was confident it would happen and I wouldn’t be pushed off to the side or ignored.”

I remember clearly how irritated I became once when we tested another virtual platform for InterCo, because they were keen that we used their platform for the virtual workshop that we were planning to run with their leaders. My colleagues and I quickly identified some structures that we felt were going completely against our own understanding of dialogue and real connectivity in the virtual space. For example, when a person wanted to speak they needed to raise their hand by clicking on a symbol and the facilitator would give them the microphone so that they could say what they wanted to say (see Section 5.1.5). My colleague Sally and I had to work really hard to help the client understand the importance of something they were perceiving as a detail. Changing the nature of virtual conversations to help them evolve into a more dialogic exchange and/or inquiry also means making conscious choices about the platform that one uses. This might sound still relatively straight forward. In my experience it is actually quite tricky because in most organisations the choice of the virtual platform to use is made by the IT department, and the so-called ‘users’, the managers and/or leaders, have to live with this choice. Hence the technology chosen shapes the nature of the virtual interaction between the participants. Furthermore the situation often becomes even trickier in my experience. In the cases of two of my clients, particularly with InterCo, the whole discussion ended up being a political one because IT was feeling questioned in their expertise since we, as external consultants dealing with the so-called ‘soft’ topics, were perceived as questioning the expert choice that they had made regarding the virtual platform. In the case of another client organisation, TopCo, the client ended up changing their platform after our intervention with them. We are not completely clear yet whether our intervention was the reason for the change of the platform or whether it was just a coincidence. What we do know is that after our virtual workshop several participants became quite vocal about the poor choice their company had made in terms of virtual platform.

Finally I would like to refer to Section 5.1.5 where I was explaining that one cannot control people's attention either in the virtual space or in the face-to-face (see Nevis 2001). So while the temptation for leaders and the providers of technology for virtual communication might be to offer even more features, to control what a team member might be viewing while one is explaining and showing a concept in the virtual space, my strong advice is to resist the temptation to control, and to concentrate instead on winning people's attention by stimulating their senses as much and in as diverse ways as possible. This is also what Suler would recommend to increase people's presence in the virtual space (Suler, no date - see Section 2.2.1). Thus I think that the communication design capability is essential for a virtual leader. I also reiterate the need for a leader to concentrate on 'share of ear' as opposed to 'share of voice' (see Section 5.1.5, Proposition 4) by offering compelling questions and provocations to work on, so that all members are engaged.

**Proposition 7: Leaders will need to be highly reflexive in how they contribute to the development of trust in their virtual teams, and to question intensively their sources of power in those teams. These will be different from the power sources that they might be able to rely on in a face-to-face context. To lead virtually, leaders will have to resist the illusion of control offered by technology.**

#### **5.3.4 Summary on trust and power in the virtual space**

In this section I have tried to give to the leader-reader a sense of how the categories of trust and power might be shifting in the virtual space. While it has not been possible to reach final conclusions on both topics, the research offers the following starting points:

- Power depends on trust in the virtual space
- Trust is rather complex to develop in the virtual space, but it can be developed purely virtually, contrary to what the predominant voices suggest: this requires intense relational work and might lead to highly powerful outcomes



- The semantic fields of trust and power in the virtual space are very rich and wide and the current research does not always do justice to this complexity. I believe that for leaders to succeed in leading virtually it will be essential to grapple with this complexity. High reflexivity will be essential to achieve this.

#### **5.4 Internet: a place where culture is shaped or a mere cultural artefact?**

During the ADOC workshop one peer, Denis, mentioned: “We are exploring using it [WebEx: the virtual platform] in a way that doesn’t reflect the way it was designed”.

Indeed the platform we had chosen seems to have been designed within a ‘tell’ or ‘doing to’ rather than an inquiry paradigm - as explained in Section 5.3.3.5 - although during our thorough research at Ashridge we found that WebEx was one of the very few platforms coming closer to our aspirations. Therefore it requires some thinking through and planning to enable inquiry processes to happen with this technology. And this raises for me an intriguing question: If the technology is currently a mirror of common practice in virtual working, what will it take to make it evolve? Should the practice evolve and define itself first and the technology will follow, or vice-versa, or should both happen at the same time? I certainly feel that the latter will be the case. I have actually started some conversations with technology experts to see how we could work together to evolve this paradigm in the virtual environment, because I am convinced that there is much to be learnt from researchers and developers of communication technologies, in terms of what might become possible.

I would like to underpin my statements with the views of Woolgar (1991a and 1991b) who explains that technology cannot be thought of independently of the users: “[...] the machine becomes its relationship to the user, and vice versa” (1991a, p.89); “This suggests that characteristics of society play an important part in deciding which technologies are adopted. Hence technology cannot be construed as a factor ‘independent’ of society. Second, the same technology can have different effects in different situations” (1991b, p.30).

Carroll et al (2001) also confirm this view of technology as socially constructed in their research on technology appropriation by young people.

Hine (2000) poses in this same context a very important question: should the internet be seen as a place, cyberspace, where culture is formed, or should it rather be seen as a product of culture, namely a technology that was produced by particular people with contextually situated goals and priorities. “To speak of the Internet as a cultural artefact is to suggest that it could have been otherwise, and that what it is and what it does are the product of culturally produced understandings that can vary.” (p.9).

Based on the example of the ADOC workshop as well as my ongoing experience with clients (a few examples were mentioned in 5.3.3.5) I would like to offer the following emerging proposition:

**Proposition 8: The current use of the internet in its widest sense, including web-based platforms, is mainly a mirror of the common practices and rules of communication. Users, virtual workers and virtual leaders cannot blame the technology for distorted communication. Instead they ought to become aware of the choices they have, of the opportunities to shape the use of technology and hence the culture that they want to promote in their virtual teams. While they don't need to be technology experts, they do need to understand how to shape a culture using the technology in question through constant and careful choices instead of letting themselves been shaped by it.**

## 6. Implications for virtual leaders: what does it take to lead virtually?

In this chapter I will build on the research findings presented in Chapter 5 and explore the implications these might have for leaders. In the first section I will summarise the results and explore their implications at a theoretical level. In the second section I will focus on who I did the research for, namely virtual leaders, and attempt to formulate concrete implications for their day-to-day work. By so doing I will systematically come back to the propositions developed in the previous chapter, and offer practical recommendations.

### 6.1 The question is WHO

My inquiry in the different strands described in Chapter 3 has led my co-inquirers and me several times to realise that effective virtual leadership starts with a radical questioning of basic concepts and the underlying assumptions behind them. These are summarised in the table below.

Basic concepts to revisit	Assumptions to challenge	Assumptions to experiment with
The concept of 'here and now'	If a person is in a different place and pursuing several activities at the same time, s/he cannot be concentrating on the ongoing meeting: one can only be in one place at a time.	It is possible for a person to be active in several spaces and still to be very present in the ongoing meeting that you are leading.
The primacy of body language in communication	One needs to actually see the person in order to develop a personal relationship with him/her.	The importance of body language has been widely overestimated. I do not need to see people to relate to them. By listening differently one can connect with somebody at a deep and very personal level.

<p>The overall concept of leading</p>	<p>Effective virtual work is about <b>good management</b> as well as self-managed teams.</p>	<p>To work effectively virtually requires a <b>clear leadership</b> that might be concentrated on one person at a time or possibly on several people. There is more need for leadership than management.</p> <p>Leading virtually is above all about:</p> <ul style="list-style-type: none"> <li>• developing strong relationships (leading is about relating)</li> <li>• developing an approach that combines facilitating the process with giving directions in a new emerging category that is still difficult to name: <i>facileading?</i></li> <li>• designing new ways of communicating where the formal and the informal can co-exist all the time</li> <li>• embarking on a self-reflexive journey where, as a leader, I experiment with a new sense of identity (given the changing basic concepts in the left column) in an active process of relating with others virtually.</li> </ul>
<p>The concepts of trust and power</p>	<p>To be able to trust somebody I need to have met the person face-to-face first.</p> <p>Power depends on my hierarchical position, my knowledge and expertise as a leader, and I need to be in control of what is going on.<sup>15</sup></p>	<p>Trust does not require any previous face-to-face meetings.</p> <p>The more I use my hierarchical power the more I will lose trust among my team members virtually and the less power I will have as a result. The only way I can gain power is by developing strong relationships and earning their trust. This trust in turn might be multi-faceted and may vary a lot according to the context as to what will foster or deter its development.</p>

*Table 3: Concepts and assumptions to question*

<sup>15</sup> One could argue that even the assumption of “being in control” in the face-to-face gets strongly questioned by some authors, for example Streatfield (2001)

In the context of numerous conversations with consultants about my research, one very experienced German consultant, Matthias, for whom I have a lot of respect, said to me once (personal communication, November 2009): “Actually leading virtually is nothing new when it comes to the WHAT, it is all about achieving the same things that every leader needs to achieve in face-to-face too, only the way of doing it is different. For example when you speak about communication, listening, trust, these are also things that one needs to attend to in face-to-face”. At that time I found it difficult to respond but I felt intuitively that this statement somehow was not right. Coming to the end of my inquiry I can now better express my view of virtual leadership in relation to what Matthias was claiming.

More than the WHAT or the HOW, what really seems to matter is the question of WHO. As a virtual leader I need to radically reconsider my own sense of myself and my sense of others, how I relate to them, how I relate to my environment and space and time, precisely because of the shifting concepts mentioned in the table above. Attempting to lead effectively virtually inevitably leads me to reconsider these questions. It is as if the answers that I give to the WHO I am and how I am in this world come first and will have an impact on the WHAT I do and HOW I do it. One could argue that this is also valid in traditional leadership but I believe that this type of questioning is particularly critical in the virtual space, otherwise the whole team construct and my leading of it might fall apart rapidly. It is as if leading virtually accelerates and amplifies a need that has been present for a long time.

On the basis of my research, however interesting some of the existing models may be, including traits and behavioural leadership theories, I would assert that they are found wanting in the context of virtual leadership. For example the Action Centred Leadership Model by Adair (1973), described in Section 2.2.3, in my view lacks a key dimension, namely the one of self awareness. I mean here a self awareness which goes beyond the awareness of one’s self in terms of personality and behaviour. I mean an awareness that goes deeper and questions one’s sense of being and relating to others in this world at a more fundamental level. Leading virtually requires us to challenge deeply held assumptions about the nature of relationships, and of the relative importance of different senses in our meaning making process. It also changes the way power shows up in relationships, and it requires us to behave differently (for example we have to plan for informal ways of relating). I would apply the same caution regarding the so-called ‘six practices of

virtual leaders' by Malhotra et al (2007) also mentioned in Section 2.2.3, precisely because of the lack of self awareness and reflexivity dimensions.

In the context of my inquiry with my ADOC peers, Kevin Power stated the following: "[It is] a world [of virtual working] which is a common place and has the potential of a new territory at the same time." (Personal communication, October 2008). I could not agree more with this statement. In there I find a possible explanation for the argument between those who state that the internet is leading to a new paradigm (for example, Strangelove, 2008 or Tapscott and Williams, 2007, or Shirky, 2008) and those who state that this has been exaggerated (Case, 2006). Depending on how one deals with the internet phenomenon and hence virtual leadership, depending on the level of depth one considers, one might take one or the other stance.

Hine (2000) makes a very helpful analysis and establishes the contrast between two emerging views on the internet. The first view of the internet is that it represents a place, cyberspace, where culture is formed and reformed, constantly renegotiated based on people's background, culture, learning, etc. and constantly shaped. The second view of the internet is that it is a cultural artefact or a representation of how we think and behave in general. So far the second view has been privileged in Hine's eyes, and I fully agree with her. My findings show that the first view deserves more focus and research.

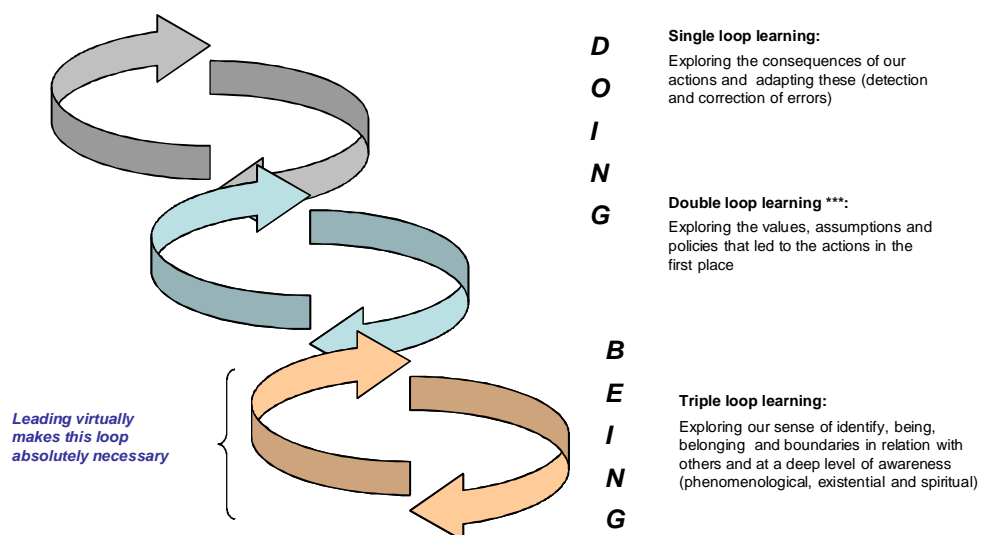
The question of effective virtual leadership is at the core of the first view: we as leaders have a choice on how we shape our interactions on the internet (or virtually) and we need to actively make that choice. This obliges us, however, to revisit in depth how we have shaped our identity and our relationships to others and our environment so far. In this process of questioning the way we have been constructing our identity and relationships to others and the universe lies the potential of entering into a new territory.

The virtual leader needs to make conscious choices, based on an all-encompassing deepened awareness and grounding, in terms of physical/sensorial, intellectual/existential and spiritual noticing which allow the exploration of new territories regarding our sense of existence as individuals, groups and organisations. Virtual working and virtual leading offers an excellent opportunity to explore our **being** and to know ourselves as human beings better. Not only does it offer this

opportunity; it makes it a sine qua non for good connectivity and effective leadership in the virtual space. Paradoxically it is not about pushing our awareness beyond our physical body; on the contrary it is primarily about knowing ourselves better in our embodied selves and realising how our mind has led us to define the norms (Lakoff and Johnson, 1999), the normal and the abnormal so far. It is more about being than thinking and doing. Furthermore, and as a consequence, I would argue that by becoming an effective virtual leader I become a more grounded leader, because I need to develop a sharper awareness, new skills and capabilities.

Hence in my eyes effective virtual leadership requires triple loop learning. In the Spring of 2009 I developed the model below.

### Triple Loop Learning



\*\*\*Source: after Argyris, C. and Schön, D. (1996) *Organisational learning II: Theory, method and practice*

Figure 8: The triple loop learning model I developed early in 2009

I am aware that the concept of triple loop learning in itself is not new. In the last five years other researchers have developed very similar concepts unrelated to the virtual space. I am thinking here in particular of the concept of triple loop awareness coined by Starr and Torbert (2005), or of triple loop learning described by Peschl

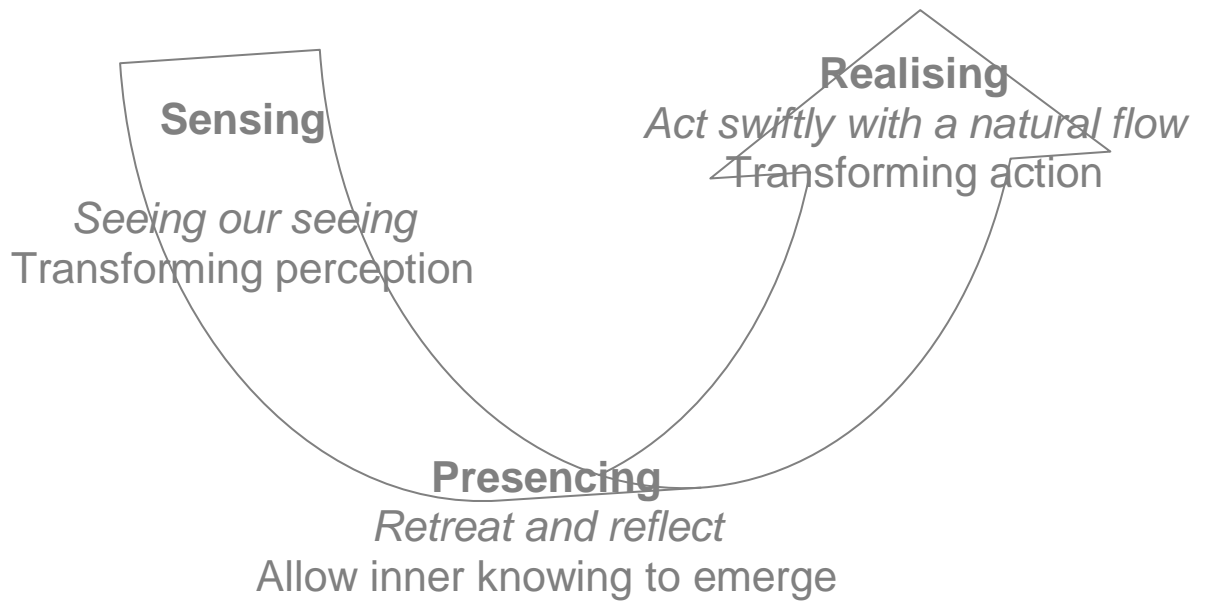
(2007). Although I developed the above concept unaware of the existence of the former two, I am very much struck by the degree of similarity between all three.

The concept presented by Starr and Torbert (2005) of a triple loop awareness is focused on the notion of awareness and presence: “Contrasting it with single- and double-loop feedback in a person’s awareness, the triple loop supposedly affords the capacity to be fully present and exercise re-visioning, frame-changing timely leadership” (Starr and Torbert, 2005, p.85). It is not about specific actions, or even overall strategies leaders can develop, but more about our very present awareness so that we feel our own presence and that of everything and everybody around us. According to Starr and Torbert this kind of awareness then enables the individual to transcend their schemata of understanding and recognise how these are guiding and limiting our understanding. In other words this awareness is also of a trans-conceptual nature; for example it enables us to transcend the concept of time or ‘here and now’, as I referred to in this paper.

For Peschl (2007) the triple loop learning concerns the existential level. It is mainly about redirecting one’s attention from the outside world into one’s interior world and, through an acute awareness, noticing what is emerging from within. It is not about ‘looking for something’ but about ‘letting something come to you’, the latter being something deeply connected with your will, deep intention and purpose. Peschl explains that the moment of ‘letting something come to you’ might feel like a moment of emptiness that “can cause existential fear in some cases, because one loses the epistemological ground on which one is standing which normally provides a rather cognitive framework” (Peschl 2007, p.140).

Both aspects, the one of being fully present as a way to transcend given concepts and the one of directing one’s attention towards the inside as opposed to looking for the answer out there, constitute key parts of Peter Senge’s so-called U theory, or the second type of learning model, which I would like to represent as follows:





*Figure 9: The U-Theory by Senge et al (2008, first published in 2004). Adapted version by combining representations of the authors*

The first element of ‘sensing’ in the model of Senge et al (2008) is key to my mind, because it involves the need to slow down in order to see with fresh eyes by becoming aware and stopping our habitual ways of thinking and perceiving. I believe that this is very much what most of my co-inquirers have been talking about (eg one MilkCo interviewee, William, Sten, etc - see Section 5.1) and where the audio and web-based way of working encourages everybody to slow down (see Section 5.1.3).

Senge et al (2008, first published in 2004) mention an interview with Master Nan Huai Chin, regarded in China as the most important living Buddhist master and a major force in the revival of Buddhism in the country, and also considered by some as ‘the’ eminent Confucian scholar:

“Master Nan then added that the core of the Confucian theory of leadership formation rests on the idea that ‘if you want to be a leader, you have to be a real human being. You must recognize the true meaning of life before you can become a great leader. You must understand yourself first.’ (Senge et al, 2008, p.180)

Senge et al underline that the “success of an intervention depends on the inner condition of the intervener” and “That’s far more important than techniques or strategies for change” (Idem, p.180). They demonstrate that the leadership required in our global institutional networks and organisations paradoxically comes back to the old idea of the ‘cultivated self’ as the ‘leader’s greatest tool’ to cultivate the wisdom of groups and larger social systems: “That’s why I think that cultivation, ‘becoming a real human being’, really is the primary leadership issue of our time, but on a scale never required before. It’s a very old idea that may actually hold the key to a new age of ‘global democracy’” (Idem, p.186).

These words resonate very strongly with my findings: as I mentioned, exploring the question of ‘who I am’ is most critical, and experimenting with this new understanding is required if one wants to lead virtually. One could call this ‘self-cultivation’ in Senge’s terms. In so doing I become a ‘real human being’ (in Master Nan’s terms), hence I become ‘a real leader’. Interestingly, if cultivating self is the most critical condition to leading effectively virtually (and I believe that I have shown this in Chapter 5) then by learning to lead virtually I become a *real* leader.

For me Senge’s words echo Wilber’s view on leadership mentioned in Section 2.2.3, and I repeat these here for easy comparison:

“Simply focussing on the global technological net misses a truly crucial feature: what levels of consciousness are moving through that net? What good is it if the entire globe is at moral stage I? That would merely spell global war. [...] - unless we put as much attention on the development of consciousness as on the development of material technology- we will simply extend the reach of our collective insanity (footnote in the text). This was the conclusion also reached by UNICEF [...], namely, that without interior development, healthy exterior development cannot be sustained.” (Wilber, 2001, p.130)

With no apparent link to Senge et al (2004), nor to Wilber (2001), Cunliffe (2009b) proposes the ‘Philosopher Leader’ concept as a different way of thinking about and developing leadership, combining the philosophical themes of relationalism, ethics and reflexivity. Cunliffe too suggests that the whole focus on leadership traits, principles, techniques and competencies is positivist in nature, and proposes as an alternative a philosophical understanding and a questioning of who we are and how

we relate to others. She advocates an approach that combines both *self-reflexivity* and *critical reflexivity*. She defines *self-reflexivity* as a concept drawing on philosophy (particularly on phenomenology and existentialism). She underlines the importance of questioning our ways of being and acting in the world and our ways of making sense of our lived experiences, linked with the aspects of responsible and ethical acting and the recognition that we shape and are shaped by our social experience. *Critical reflexivity* is more about questioning the assumptions underlying textual, theoretical and ideological positions as a way to think critically about social and organisational policies and practices, and as a result what is being considered as good leadership and management practice. Talking about the EMBA Leadership course that she was teaching, she concludes: “One value of this course for me was reaching the understanding that if one intends to be seriously reflexive, the who must precede the what.” (Cunliffe, 2009b, p.99).

All five different perspectives that I have shared above - the Triple Loop Awareness from Torbert and Starr (2005), The Third Loop Learning from Peschl (2007), the U-Theory from Senge et al (2008, first published in 2004), the raised levels of awareness in the concept of Wilber’s Integral Leadership (2001) and the ‘Philosopher Leader’ concept from Cunliffe (2009b) - seem to be pointing to the need for higher levels of awareness being necessary to inform deeper levels of knowing and decision making. This echoes my thinking represented in the triple loop learning model developed in Figure 8. Only when I manage to work with the question of WHO I am as a virtual leader will I be able to be effective and overcome the challenges encountered by most leaders in the virtual space. The hypothesis, which I hold more strongly and loudly at the end of this inquiry, is that the reason why leading and working virtually have so far remained a challenging and unsatisfactory experience for most is precisely because leaders, researchers and management theorists have concentrated on the How and the What but have neglected the Who. The Who has been the road less travelled so far, if travelled at all, although the fruits to be harvested are the ones of a deeper, more robust and grounded leadership. It seems to me that if virtual leaders want to be successful they have no choice but to take this road. By taking the detour of leading virtually, leaders will become better leaders; by becoming virtual leaders they will become **real** leaders.

In other words if we want to really access the nature of effective virtual leadership with all it brings in terms of newness, challenges and questions, we must have the

courage and strength to become self-reflexive. I mentioned in Chapter 3 that my stance in this inquiry has been less to offer clear answers and a clear model of virtual leadership and much more about formulating the critical questions and keeping them alive. I believe that this is congruent with self-reflexivity.

At the end of this inquiry I want to make an additional offer. Not only does the practice of virtual leadership require a new stance, but the research on virtual leadership obliges us to reconsider the way we think about leadership in general. Leadership research, as I mentioned in Chapter 2, has been immense in volume, rather inconclusive, and frustrating so far with contradictions at its core. The researchers and authors mentioned above (Torbert, Starr, Senge, Wilber, Cunliffe) as well as Ladkin (2010) were not focusing on virtual leadership when they published their new views on leadership. My understanding is that their efforts were motivated by a real sense that alternative ways of thinking about leadership in general were called for. It was like a converging moment in my own research when, looking for alternative ways of making sense of my research findings, I learnt about the thinking of these authors. To summarise my point, I would like to suggest that virtual leadership research might accelerate a fundamental shift in our thinking on leadership, a shift that has already begun in the last few years.

Furthermore when one manages to overcome the temptation to think within given categories and to fragment the way of exploring it in well known concepts, the effort to understand virtual leadership seems to invite us to go beyond the taken-for-granted; and possibly a larger construct, one beyond the leadership construct, might be unsettled. Kuhn's criteria for a paradigm shift (1996) seem to apply well in this context:

“Confronted with anomaly or with crisis, scientists take a different attitude toward existing paradigms, and the nature of their research changes accordingly. The proliferation of competing articulations, the willingness to try anything, the expression of explicit discontent, the recourse to philosophy and to debate over fundamentals, all these are symptoms of a transition from a normal to extraordinary research. It is upon their existence more than upon that of revolutions that the notion of normal science depends”. (1996, p.90-91).

At some point Kuhn explains the following: “One perceptive historian, viewing a classic case of a science’s reorientation by paradigm change, recently described it as ‘picking up the other end of the stick’, a process that involves ‘handling the same bundle of data as before, but placing them in a new system of relations with one another by giving them a different framework’ [footnote in the text]. Others who have noted this aspect of scientific advance have emphasized its similarity to a change in visual gestalt: the marks in paper that were first seen as a bird are now seen as an antelope, or vice versa”. (Kuhn, 1996, p 85). For example I am wondering how one might look at the concepts of leading and/or facilitating or at the concepts of trust or power in ten years from now, when I assume that more people will practice virtual leadership and more people will research in this field.

## **6.2 So what?**

Obviously stopping my reflection at the end of the previous section might leave the reader wondering about the concrete implications of this inquiry. As mentioned in Chapter 4, I would like to define the quality of my research foremost through its ‘usefulness’ for virtual leaders. Having explained at length why I think that ‘to do lists’ have only had a limited use and why it is important to focus on the WHO, how can I find a way to be helpful and to remain congruent with my approach at the same time?

Even if the aspects that I raised in the previous section about self-reflexivity and self-cultivation as a virtual leader might lack the concrete and tangible action orientation that managers and leaders are used to receiving nowadays, I don’t think that they are therefore less useful. They might leave leaders thinking: So what? Where do I start? What do I do now?

I would like to address these questions and, based on the results of my inquiry, attempt to offer guidance and help.

Before doing this though, I would like to underline two elements of what I believe should contribute to the ‘usefulness’ of my inquiry for the leaders-readers. First, I hope that the concrete lived examples of my co-inquirers and myself will be of use as they might be examples that my readers can associate with or recognise from their own virtual leadership experience. Second, my aim has been to map the territory as best I can and to be particularly mindful of key milestones along the

way. Hence the series of questions and/or guidance I am offering below are intended to help the leader-reader to be self-reflexive and to work on “The virtual leader that I will become”, as opposed to becoming the virtual leader that I, the researcher, advise that s/he should become.

I am now framing my questions and/or pieces of advice directly linked with the propositions that I have been formulating throughout my inquiry.

**Proposition 1: In order to lead effectively virtually, leaders need to have the willingness and capability to be self-reflexive. They can achieve this by experimenting with new ways of relating to and leading others and by taking the time to reflect about that at a deeper level. This requires taking risks and challenging the status quo in terms of managing, as well as deeply questioning their identity as leaders.**

***Therefore***

*Don't transfer into the virtual space what you have been doing in face-to-face, but slow down and reflect on what you are experiencing when you lead virtually: What are you learning about yourself? What are you learning about others? When do you seem to connect well with others? Which aspects become critical? Be prepared to work hard at reflecting and learning. This might feel lonely at times because not so many have chosen this road so far. You might want to read William's story again. You might also want to get the help of a coach to practice self-reflexivity.*

**Proposition 2: Leading others well virtually requires the development of a new awareness of and working differently (compared with face-to-face) with the basics of communication such as listening, focusing and engaging with others.**

***Therefore***

*Be prepared to question the assumptions that you make when you think that somebody is listening to you (or not), or is present and engaged (or not). Be prepared to revisit your practice when it comes to engaging with others virtually, and think of different ways in which to experiment. You might want to read again the ADOC peers' findings and to get some inspiration from William's or the InterCo's examples.*

**Proposition 3: Through our virtual work in audio and web-and-audio based environments we can develop a different listening ability, a sharper sense of connectedness with others in the field, a kind of seventh sense that enables us to connect at a deeper level (than in face-to-face) with ourselves, others and the universe. Because most management and leadership training has been closely focused on the visual and has privileged body language, to be effective in the virtual space leaders will need to develop the capacity to listen differently and more deeply.**

***Therefore***

*Put aside the myth of body language and relax into listening. Listen to the voice of others; slow down to go deeper. Learn to enter the voice as a world in itself with all it entails: the tone, the speed of speech, the pitch, the silences, etc. If necessary get yourself trained to do this.*

**Proposition 4: The virtual leader needs to be ready to radically reconsider his notions of 'being present' 'here and now' and to let go of the desire to control what others do in the virtual space. S/he needs to develop the skill to sense others' presence and to win others' attention. The concept of 'share of ear' (as opposed to 'share of voice') comes to mind as a critical one when it comes to leading virtually: it is not about how much you say but more about how much you attract people's attention.**

***Therefore***

*Try to relinquish your need to be 'in control'. Experiment instead with your own sense of engagement: how do you know that others are engaged? How can you win their attention? Do you really understand what motivates your team members to be in the virtual space with you? And more generally: how do you relate to others and to your environment?*

**Proposition 5: The virtual leader needs to recognise relationships as THE key pillar of his/her virtual leadership, and needs to be prepared to face challenges and a lack of understanding from traditional managers. Building and nurturing relationships in the virtual space and finding the appropriate ways to do so is an essential aspect of virtual leadership.**

**Therefore**

*How much time do you spend building and nurturing relationships in the virtual space? How do you feel when you do this? Do you feel that you do enough relationship building? If not, what gets in the way? What can you do about that? You might want to re-read Silvia's story.*

**Proposition 6: Leading effectively virtually requires one (or several) people to feel responsible for leading. In the virtual space this also means facilitating in a wide and complex sense, paying as much attention to the process as the content, making process and content become even more the same thing. It also includes highly conscious choices regarding the medium to use and how to use it. This in turn requires skills and competences that need to be taught and developed in people.**

**Therefore**

*Be prepared to radically question the practice of leading which you have known so far, and to stretch your understanding of leading. Management (in the sense of planning, co-ordinating activities, sending information, etc) might be necessary but it will not be sufficient. Be prepared to experiment with new ways that might include facilitative elements, or that might feel odd because you are at the crossroads between aspects that you might not be used to. Be prepared to take risks. Reflect on how you experience the experiment and ask yourself: What am I learning about my leadership in this space? What serves me well? Can I do that alone? What help shall I get? You might want to re-read William's story and his experiments.*

**Proposition 7: Leaders will need to be highly reflexive in how they contribute to the development of trust in their virtual teams, and to question intensively their sources of power in those teams. These will be different from the power sources that they might be able to rely on in a face-to-face context. To lead virtually, leaders will have to resist the illusion of control offered by technology.**

**Therefore**

*Understand what really motivates others to join you and your colleagues in the virtual team, and to follow you. This will take dedicated effort and time. Reflect on what might be your sources of power in the virtual space, on how*



*you use them and how they serve you. Reflect on the moments when you felt most trustful and on the moments when you felt most trusted in the virtual space with your team. What contributed to that? Compare and contrast your learning with Section 5.3.*

**Proposition 8: The current use of the internet in its widest sense, including web-based platforms, is mainly a mirror of the common practices and rules of communication. Users, virtual workers and virtual leaders cannot blame the technology for distorted communication. Instead they ought to become aware of the choices they have, of the opportunities to shape the use of technology and hence the culture that they want to promote in their virtual teams. While they don't need to be technology experts, they do need to understand how to shape a culture using the technology in question through constant and careful choices instead of letting themselves be shaped by it.**

***Therefore***

*Consider yourself the gardener of your virtual space. There are plenty of choices to be made as to the culture that you want to nurture in your virtual team. Make these choices on the basis of a deeper awareness of yourself and your colleagues in the space (see Proposition 1) instead of letting the technology make the choices for you. If you feel unsure as to the best technology and the best features to use, get help (not necessarily only from technology experts, but from other virtual leaders).*

I would also like to complete this guide with the view of MilkCo's virtual leaders. Several among them underlined the need to keep practising, hence emphasising the concept of virtual leadership as a new discipline:

*"Now I think that we have learnt a lot, but I can forget. I need to continue using it". "You need to do this frequently in order to increase your efficiency. It is a new discipline that needs to be practised".*

Finally I would like to finish with a provocation and tell you a true story. In 2009 I was working with a young leader employed by one of the leading telecommunication giants, and I was asking him about his experience of leading virtually, as I knew that he had begun to transfer a lot of his activities into the virtual space.

Here is what he told me:

“We had a few months to agree on and develop an implementation plan for this merger and here I was, in my cellar, in the middle of the night, working with the US and Asia, in my joggers and socks, my headset on, negotiating on one of the most important mergers for our company! My wife didn’t want the kids to be disturbed as it was late at night and I might have woken them up by talking on the phone for so long, hence I had to go and work in the cellar with my rabbit as my only companion. It must have wondered what I was doing!”.

The days of impressive desks in representative offices, glamorous jet setting and stays in luxury hotels might be numbered ... how do you feel about that? How might this affect your sense of identity as a leader? At least if you become an effective virtual leader you will be able to be much more choice-ful about when to travel in the world. You might have more time available for inner travels as a result.

## **7. My contribution and further areas of research**

In this chapter I will summarise what I believe my contribution to understanding virtual working and leading has been through this research, and I will indicate paths for further research in this field.

### **7.1 My contribution to understanding virtual working**

My aim in this research has been to help leaders to become more effective at leading virtually, therefore I have wanted to put my research in the service of these practitioners.

So far the topic of virtual leadership has hardly been studied, although in the last few years there has been some growing interest around it (See Chapter 2.1).

In most cases research methods have been limited to either internet-based surveys (online questionnaires) and/or semi-structured interviews of managers. In some other cases the research (in the form of questionnaires and/or interviews) has been limited to employees of one organisation only. While this approach might provide a useful start, the limitations are that the results only represent the views of managers at a certain point in time and do not necessarily allow for deeper reflection on their experience and learning. This limitation becomes even more critical if the manager interviewed has little or no experience of leading virtually, and therefore expresses views based on his/her traditional leadership experience with a priori view on virtual working and leading.

Before 2005 most books and articles on virtual working concentrated on the management aspects of it, focusing on the task and 'to do' lists, and were more the results of their authors' views and personal experience rather than in-depth research.

Based on all the above mentioned aspects, this research - and hence the contribution that I hope to make as a result - is unique, in the sense that in my study of virtual leadership I have applied the methodology of Action Research, which as far as I can see (in April 2010) has not been applied so far to this topic. I have worked with a combination of research methods such as collaborative inquiry, sustained inquiry with individual leaders (in the context of coaching), semi-structured

interviews and journaling. In my research I have involved several people (the vast majority of them being leaders who lead virtually) from different organisations and I have accompanied them for a duration varying between six months to two and a half years. Furthermore another important aspect of my work has been to combine second and first person inquiry in this research (Torbert, 2001). My work has been about making sense of what my co-researchers and I were finding in terms of the virtual leadership experienced, either on the side of my co-researchers or between my co-researchers and myself, and the questions were: “How are we experiencing virtual leadership between us?” and “What sense are we making of the virtual leadership that you - my co-researcher - are experiencing?”. I also made sense of virtual leadership through my own experience of leading virtually and by sustaining the question; “What am I learning as a virtual leader?”. My intention has been to provide a multifaceted research framework that would work like a kaleidoscope across several inquiry strands and across the first and second person inquiry perspectives, and enable me to identify the emerging themes that seemed most critical and common among the strands.

In summary, I would claim that my contribution is not only linked to the fact that I have researched into a topic that has been poorly examined so far, but that it is also linked to the approach that I have chosen for looking at this topic. I hope that the multiple life examples that I have provided along the way and the unanswered questions that I have been keeping alive throughout will offer to research fellows interesting paths for further work.

## **7.2 Further areas of research**

I would like to come back here to the questions that I raised in Chapter 5 (printed in orange) and show how these, with additional ones, can represent important areas for future research.

My attempt to map the territory of virtual leadership is far from complete. My mapping has occurred as the result of a few journeys of leading virtually with my co-researchers. I/we have been drawing the map as we went along. And there are still many more journeys to undertake before being able to claim that it is a true map.

I would like to encourage others to persist in the stance of pursuing further wide exploration of the topic of virtual leadership in a holistic way, as opposed to

fragmenting and going down one specific theme of inquiry within this field (eg trust in virtual leadership, or the role of audio in virtual leadership), because I believe that there is much more ground to be covered first, and that from this holistic inquiry new categories of learning might emerge.

As a further major step I would suggest the need to gather, explore and inquire into further stories and 'moments' of virtual leadership, and to do this through the phenomenological lens as being perhaps the most appropriate lens, enabling the researcher to remain open and to stay beyond the classic categories in terms of management and leadership research.

I would also like to suggest further aspects for future research that might admittedly lead to some fragmentation of perspectives, but the latter will have the merit of stemming directly or indirectly from the idiosyncrasies of the virtual environment, as opposed to the traditional management and leadership categories:

- I am conscious that my inquiry has implicitly maintained the distinction between the synchronous ways of working - what people do at the same time but from different locations, eg teleconferences, WebEx, net-meetings - and the asynchronous - what people do in different times and in different places, eg by using blogs, asynchronous conferences, intranet websites like SharePoint, etc. - and that this might actually prove to be an important and necessary differentiator in the virtual space. This distinction and differentiation in an explicit way might represent an important subject of inquiry at some point, as both modi operandi involve different team dynamics and ways of working virtually.
- Furthermore my inquiry has not specifically considered the use of the so-called 'social media' such as Facebook, Twitter, LinkedIn, Xing, Plaxos, etc.. I believe from my experience that these media currently play a big role, particularly in extra-organisational exchanges, and might become even more important with the 'digital natives' entering the corporate world. In this inquiry I decided to concentrate more on the virtual leadership within organisations as a way to start, because I believe that this focus answers the most pressing need, based on the experience of the requests that I get from clients. However I anticipate that the landscape will change and that it will be key to consider extra-organisational virtual leadership (ie leading team

members from different organisations), and hence also social media. In addition, as mentioned in Section 5.1.6, research into the use of social media, particularly the virtual informal intra-organisational exchanges, might also provide very useful insights when it comes to leading virtually.

- Taking a more psychological perspective, I believe that attempting to address the question around people's perceptual filters and representational systems (visual, auditory, etc. in NLP terms) and their impact on people's leading and working virtually (see Section 5.1.3) might be useful and represent a specific inquiry strand worth pursuing.
- Also, as mentioned in Section 5.3.3.1, Caldwell's (2004) work on 'virtual management intuition' seems to me to be particularly relevant in the context of virtual leadership and deserves some dedicated research, not only in relation to trust in the virtual space but also in relation to leading virtually in general.

Finally, my inquiry has been focused on European leaders, although it included leaders from the US, South America, India and Asia, because my key co-researchers are British, German, Belgian, and I am French. I am wondering for example about the answers that Asian leaders might give to the questions that I am raising about leading virtually at the end of Section 5.2.1. I believe that exploring virtual leadership through an Asian lens might help to unsettle further the traditional categories of management and leadership research that we know from the Western world, and in so doing contribute to letting new categories and new learning emerge.

## Closing remarks

At this stage of my inquiry the word 'conclusion' does not feel appropriate to me. My inquiry into virtual leadership started before my doctoral work and will certainly carry on after that in the context of my practice. Therefore I can only close my reflection for the purpose of this paper. I will do this by coming back to what my intentions have been regarding my ADOC research and by offering some closing reflection on these.

At the end of Chapter 1 I mentioned that I was seeing my research in virtual leadership also as an enactment of my own leadership, because I wanted to take a lead in this field. How much I have succeeded will be for the readers to decide. From my perspective I feel that I have at least started to do so by choosing to take an established topic (virtual working) into new territory (virtual leadership) in an attempt to uncover new ways of looking at the field, and to provide possible answers, or rather questions as guides, to address an ongoing dissatisfaction, namely that virtual working so far has remained an unsatisfactory practice.

At times this has meant working against the flow, saying 'no' to faculty, and taking risks in terms of the way I have carried out this research. This has also meant intense moments of doubt as well as strong moments of excitement when learning with my co-researchers. It also meant moments of frustration, followed by great insights with some of my ADOC peers.

Taking a lead in the field of virtual leadership in addition means in my day-to-day work careful listening and giving ongoing encouragement to clients, who are often sceptical about the value of working and leading virtually when they start. This requires a constant dance between my own enthusiasm and their scepticism. I am continuously seeking for ways to engage them on a fruitful learning journey about virtual leadership; they might have strong scepticism as a common denominator to start with, but still be unique in the place from which they start their journey (eg. some of them will have developed years of bad virtual working practice focusing only on the task, the 'what', and hence be weary of the topic; others might be just about to shift to virtual working and feel unsure and curious at the same time, etc.).

As a result of this research I feel that I have strengthened my own virtual leadership in several ways. Firstly, through my own process of reflexivity I have learnt to own

my expertise in the field and to be more directive at times (see Section 4.3). This felt rather odd in the beginning but I find myself getting more and more at ease with that stance. Secondly, I have also learnt to trust and work more actively with my intuition (following what I sense is necessary) as opposed to trying hard to do things the 'right' way. When it comes to research for example: when entering relatively uncharted territory there is not necessarily a 'right' way of doing things. As described in Sections 4.3 and 4.4 it took me some time to let go of "the right way" illusion and to carefully and tentatively feel my own way into what would be appropriate for my research. Finally I have learnt to work with my passion in a more generative way. The concept of "practical authoring" (Shotter, 1993) that was so helpful in my interpretation of research outcomes has proven to impact also on my leadership in the virtual space, and has enabled me to find a way to engage with my clients that invites them to dance with me, as mentioned above, and explore their virtual leadership. This is in contrast to my prior passionate stance that others might have perceived as an attempt to convert them.

Above all, as mentioned in Chapter 4, my intention has been to help leaders to learn about virtual leadership. I sincerely hope that the examples explored with my co-researchers and the resulting emerging propositions will resonate with the leaders out there and provide them with the insights, provocation, questions and inspiration that they need to develop their own examples of success and become 'real' virtual leaders.

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## Appendices

## **Appendix 1: Briefing and contracting document used for inquiry work with William, Sten and Silvia**

### **Virtual Leadership Inquiry**

#### **Briefing for Virtual Leaders**

**July 2007**

### **Purpose of research**

The research will take place in the form of an inquiry aimed at exploring the following aspects of virtual leadership:

- The nature of communication in a virtual environment
- The nature of connectivity in a virtual environment
- Trust in a virtual environment
- Influencing in a virtual environment
- What makes people willing to be led by a person (or a group of people) in a virtual environment, or not?
- The nature of leadership in a virtual environment
- The need for embodiment in leadership (or what it means to be led by an 'absent' leader)
- The nature of follower-ship in a virtual environment
- How virtual leadership is different and/or similar to face-to-face leadership
- The profile of virtual leaders
- Skills and competencies of virtual leaders.

### **Research approach**

The research will be conducted predominantly from within a participatory paradigm and the selected approach is the one of Action Research.

The underlying ontology for this research includes the following assumptions:

- Reality is based on perceptions, and the researcher and the 'researchee' (who becomes a co-researcher), construct reality together

- Hence the researcher makes sense together with the ‘researchee’ of what is going on and of the implications for the subject matter inquired into.

This means in terms of epistemology that particular emphasis will be laid on the *experience* of virtual leadership, the *reflections* about it and the *practical knowing* emerging from it, the latter being then additionally informed by theory and models.

The plan is to accompany you as a leader of a virtual (and/or semi-virtual) team over a period of one and a half to two years in your leading activities with this team.

A typical procedure would be as follows:

- Meeting with yourself on a one-to-one basis to explore the topic of virtual leadership on the aspects mentioned above, as well as the challenges that you encounter and your learning edge in the area of virtual leadership
- Shadowing your planning of upcoming meetings with your team
- Shadowing your virtual interactions with your team members
- Shadowing your synchronous meetings with your team
- Debrief and shared reflection on synchronous meetings and other activities.

Where appropriate and necessary we would also involve team members or further third parties in the reflection loops mentioned above.

The research might also include:

- co-inquiry with two other leaders, also ‘researchees’, in the context of this virtual leadership.

We anticipate between seven to ten cycles of inquiry as described above. Obviously there will be spontaneous meetings or needs for inquiry and reflection that will be addressed as well, as these emerge.

We anticipate that the time requested from you to spend with myself in the context of this research will be approximately four hours per month. We anticipate that all this interaction between you and myself (or the major part of it) will take place in a virtual environment.

## **Research process**

Some hypothesis will be formulated and tested out during the cycles of inquiry described above. Intermediary conclusions will be formulated and built into new emerging hypothesis that will be tested out in the following cycle of inquiry, and so on. We anticipate that after seven to ten cycles of inquiry, the research will have sufficiently progressed to achieve substantial and well funded results, although we are clear that learning on the topic of virtual leadership will be *living and ongoing*.

Good quality research outcomes will be ensured not only through the seven to ten cycles of inquiry with yourself as a virtual leader, but also through the cross-learning coming from similar cycles of inquiry with two further virtual leaders. In addition, secondary research will also be taken into account to process learning as we go along.

## **Benefits for yourself: “What’s in for you?”**

- Ongoing coaching regarding your leadership
- Learning from inquiry with other leaders
- Learning from new research outcomes as they emerge.

## **Confidentiality**

We ensure confidentiality related to both business and/or personal aspects involved in the research. Descriptions of research outcomes will be agreed with yourself before being published.

## **Further agreements**

We would like to offer the following understanding for this research:

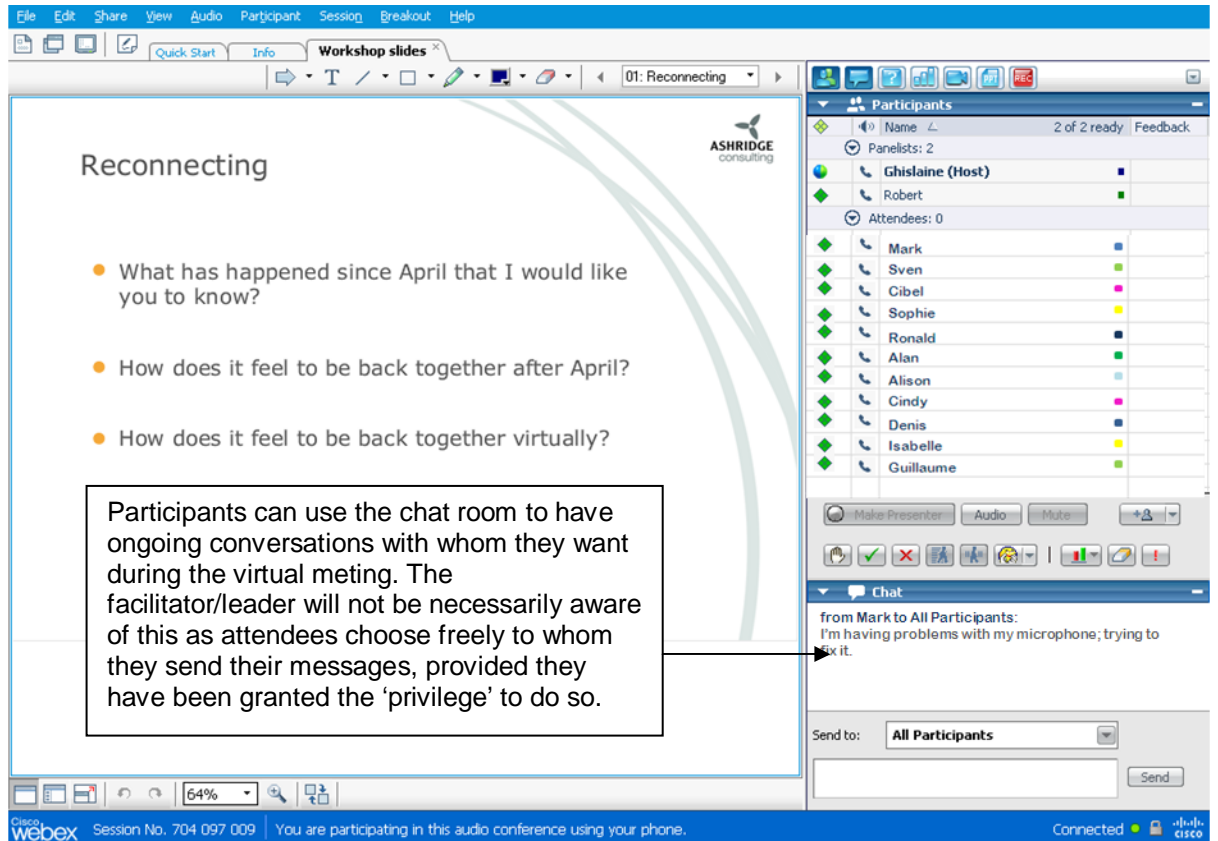
- Researcher and researchee (yourself as a co-researcher) have a joint responsibility for the quality of the results. This means that both parties are expected to apply critical thinking and possibly express concerns, questions, doubts as to the development of the research if something doesn’t feel right or doesn’t seem to go in the right direction

- Researcher and researchee commit to reciprocal availability and commitment to the work over the agreed period of time, although the research period might be shortened or extended in the case of major unexpected events, or simply in the event that the research requires less or more time than expected.



## Appendix 2: Meeting and working on the WebEx platform

The screen print below represents the way a virtual meeting is held on the WebEx platform.



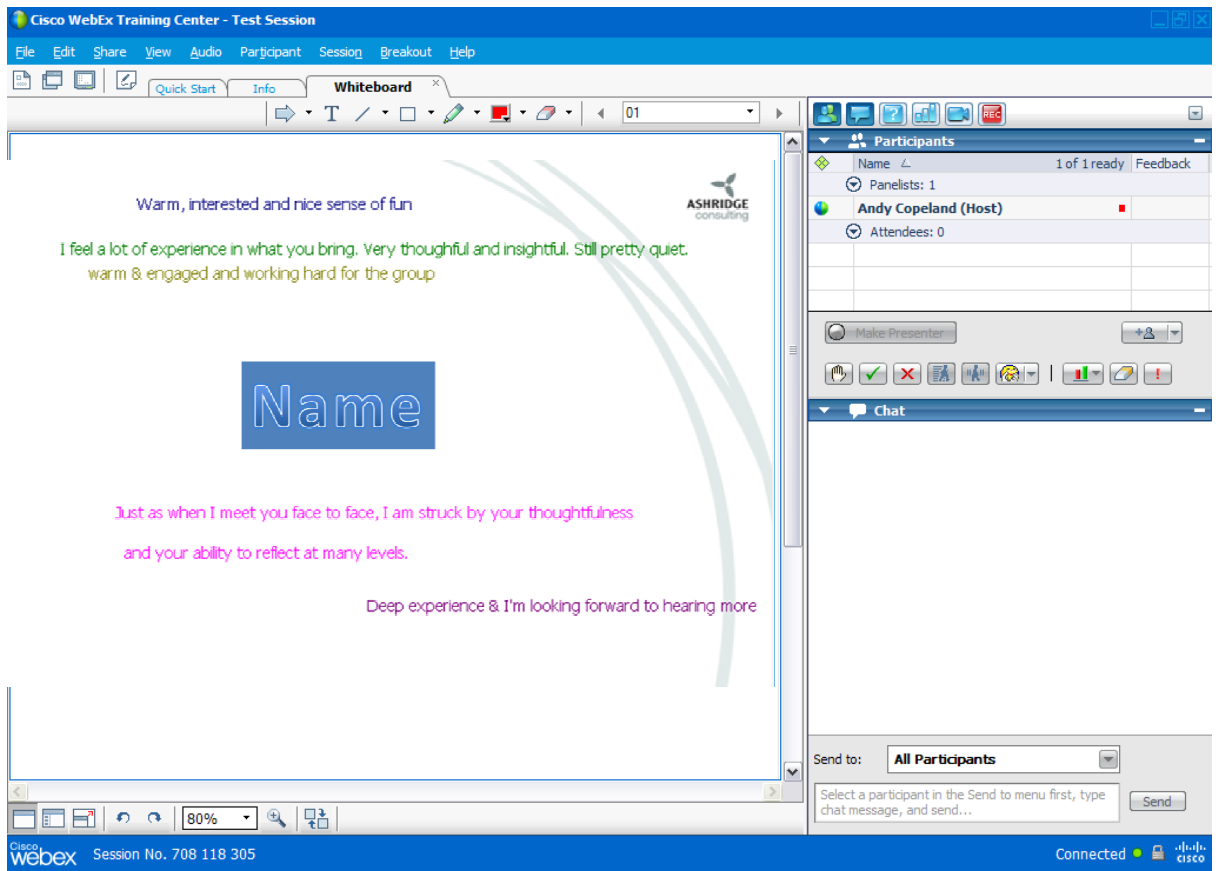
### Sharing and working on whiteboards

In addition to sharing presentations and documents in a session, the presenter and/or the attendees (provided that they have been given the opportunity or the so-called 'privilege' to do so) also have the option of sharing a whiteboard.

The presenter and attendees (if they have been granted the privilege) can draw and type on the whiteboard.

Sharing a whiteboard in WebEx is just like using a whiteboard or flip chart in a classroom setting. Whiteboards can be used for brainstorming and other collaborative activities. They can be used in parallel while other activities are happening on the platform, eg a presentation, a group discussion, etc.. Presenters

can also use a whiteboard to list session ground rules, or record ideas for later discussion. A whiteboard can be printed or saved.



## **Appendix 3: Example of a focus exercise**

### **Short history of this exercise**

In the context of my inquiry and experimentation with the virtual facilitation of action learning, the several experiments that I did with clients led me to realise the importance of being well aware of one's body and bodily sensations when doing virtual work. The reason for this is to avoid the projection of one's own feelings and emotions onto others in the virtual space, and/or the psychological phenomenon of 'confluence' where one gets into a kind of symbiosis with somebody else in the virtual space, making it impossible to distinguish between the two worlds (my world and the world of the other) any longer. In order to help my clients in the virtual world to be as grounded as possible and enter into a 'healthy' connection with others in the virtual place, I developed a so-called focus exercise and decided to make it an integral part of audio action learning. The detail of these findings and conclusions can be read in my AMOC thesis (Caulat 2004).

### **Example of a focus exercise:**

Close your eyes

Breathe deeply in and out, deeply in and out...

Imagine that you are a small laser travelling through your body

As a small laser you explore your body

You start with your feet

You feel the ground under your feet

You go into your toes, one toe after the other one

You notice any sensation or tension in your toes

Notice any sensation or tension in your heels

Slowly you go up your leg, up to your knees

Slowly go further up your thighs

Notice any sensations, any feelings in your legs

You breathe deeply in and out, deeply in and out...

You now go into your bottom

You feel your bottom on the seat: is your seat hard, soft, warm, cold...?

You notice any sensation in your bottom

You now explore the lower part of your belly and of your back

You go up to your stomach  
You go up along your spine  
Notice the rhythm of your breath  
Notice any sensation in your stomach  
Notice any tension along your spine  
You now go further up to your chest  
You breathe deeply and slowly in and out, in and out...  
Notice any sensations in your chest  
You now go into your shoulders, your neck  
If you feel any tensions, in your mind, blow warm air into the tensions  
You now explore your face, your chin, your cheeks  
You explore your eyes, your forehead  
Notice any sensations behind your eyes  
Notice any sensation in your forehead  
Breathe deeply in and out, deeply in and out...  
You now explore your head, you explore the cavity of your head  
Notice any sensation, any tension, any noise...  
You notice the thoughts coming into your mind  
You let them come and go again, come and go again...  
You imagine a fresh breeze on your forehead  
You feel fresh, relaxed, fully alert  
Breathe deeply in and out, deeply in and out...

You now sense the presence of your colleagues in this action learning set  
You will think of each colleague, one after the other, including yourself  
You start focusing your mind on X (name one of the AAL set members)  
You remember her voice, the tone of her voice  
You remember what she said last time you talked to her  
If you don't remember what she said, just feel her presence now  
You breathe deeply in and out, deeply in and out...  
You now focus on Y (name of another member of the AAL set)  
[Repeat the above]

[Finish with yourself as facilitator as follows:]  
You now focus on Z (the facilitator)  
You listen to her/his voice, the tone of her/his voice  
Just feel her/his presence now

You now think of yourself again in this space

Notice how you feel, notice the thoughts coming and going [short pause]

Breathe in and out, deeply and slowly, in and out...

Just stay there for a little while [pause]

Now at your own pace, open your eyes

When you are ready, say your name and 'I am ready for the session'.

## **Appendix 4: Post-viva paper: why I want to stick to my open questions**

### **Virtual Leadership**

**Ghislaine Caulat – ADOC I**

**05/09/09**

*As a result of the viva Ghislaine has been requested to write a short piece about the choices she wants to make and the literature territory that is being called up as a result of those choices (a mind map might well be a good idea).*

Kathleen King, 27<sup>th</sup> July 2009

In this document I am responding to the request made by the ADOC faculty after my viva on 16<sup>th</sup> July 2009 (see above).

I want to pursue my efforts to answer the question “What does it take to lead virtually?”. I define ‘leading virtually’ as ‘influencing others in a technology-mediated world’.

My target readers’ group will be leaders in organisations. I want to subscribe to the criterion of usefulness in terms of validity of my research. Therefore I aspire to provide leaders with a useful (in the sense of something with which they can identify, understand, get inspired by and use directly in the context of their virtual leading) thesis for their work in the virtual space.

With this intention I am aware that I am stepping into difficult territory from an academic point of view. The academic difficulty lies on two parallel challenges:

- There is an inflation of research about leadership and a complete lack of clarity (and agreement) about what leadership actually is/means
- There is an inflation of ‘recipe books’ written about the area of virtual working and virtual teams, and still working virtually remains a big challenge, often a second-class type of work for most people

From an academic point of view I run the risk of conflating both inflations if I remain with the research frameworks developed and used so far in the areas of leadership and in the area of virtual working. Furthermore I believe an assumption that leading

virtually can be analysed from within the existing leadership paradigm only is a risky one. So far very little work has been done to actually research on virtual leadership. I am aware of one PhD by Dr. Timm Eichenberg (2007) as well as of a Doctor in Business Administration by Dr. Beat A. Buhlmann (2006)<sup>16</sup>.

I have chosen not to let my mind be framed too much by the existing leadership paradigm but to immerse myself first in the practical world of leaders who have discovered/ are still discovering how to lead virtually, and to inquire with them (I have done this for over 2.5 years now). In so doing I have been taking the stance of 'living the questions' (Donna Ladkin, in press) about 'what it takes to lead virtually', in the sense that I have made a conscious effort to keep my questions as open as possible for as long as possible. I took this decision based on a clear sense that I was tapping into a territory with many unknowns (although it has been written about for so many years) and therefore offering enormous potential for new discovery, provided I kept my (and my co-researchers') mind open to discovering the unknown.

I have chosen to start from the lived experience of these leaders as well as from my own lived experience of leading and facilitating virtually to develop my own framework, inquire and reflect about what I and my co-researchers are finding and learning. During the viva I was asked to make a choice in terms of whether I wanted to focus on virtual leadership or on virtual facilitation and whether I wanted to focus on specific themes such as power or presence. In my view complying with this request would lead me to work from within a pre-given framework of categories about leaders and organisations that has emerged in a predominantly face-to-face paradigm. This does not feel right to me as it is not congruent with my research question related to the virtual world. More importantly I can even state at this stage that one strong emerging pattern from my research is that the boundaries between facilitation and leadership in the virtual space are becoming blurred. Furthermore the topic of power in the virtual space that I start to recognise proves to be very different from the way power has been defined so far.

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<sup>16</sup> In the recent years there have been a few research attempts to analyse leadership in virtual teams. The articles, as well as both theses mentioned above, approach the topic first from a theoretical point of view and then check their hypothesis through empiric research. For example Dr. Eichenberg proceeds to a vast review of the literature on leadership and other disciplines, develops as a result 28 hypotheses that he then validates through an empirical study with an online questionnaire completed by 111 people. Based on the results he then derives models for effective Distance Leadership.

The deeper I go into the emerging themes from the research with real people learning how to lead virtually in the real world, the more I am finding that the phenomenon of leading virtually seems to be challenging the traditional concepts of leadership as well as the way to research and theorise about leadership. Does this mean that inquiring into 'what it takes to lead virtually' might lead to some paradigm shift in the thinking about leadership? While my primary aim will be, as mentioned above, to write something 'useful' for leaders and help them in their efforts to lead virtually, I may on the way capitalise on my findings and make the case for a shifting paradigm in leadership thinking and leadership research. However, I do want to keep the 'living the questions' stance vivid throughout my thesis and do not want to endanger it by addressing the need and giving into the temptation to make a case for a shifting paradigm.

During my viva I was asked to turn my narrative into an argument. This is what I am planning to do along the lines mentioned above.

In summary my argument will have the following flow: I will start with the substantial and systematic inquiry and learning from the (virtual) field of work with my co-researchers, then develop some hypotheses about 'what it takes to lead virtually' while at the same time developing my own framework to present these hypotheses within the categories that will emerge from the lived experience. I will justify this methodology by showing how the findings cannot be 'pressed' into the existing frameworks about leadership and/or facilitation. In so doing I hope to be able to invite my reader onto a journey of paradigm shifting in terms of his/her understanding of his/her own leadership, and more importantly to provide them with some 'living questions' that will make a difference to the way their team(s) will work, feel and think in the virtual space.

The key literature that I plan to use (in addition to the bibliography presented for my viva) will include:

- Keith Grint, *Leadership, Classical, Contemporary, and Critical Approaches* (1997)
- Keith Grint, *Leadership: Limits and possibilities* (2005)
- Roger Gill, *Theory and practice of leadership* (2006)
- Peter Northouse, *Leadership, Theory and Practice* (2007)



- Mats Alvesson and Stanley Deetz, *Doing Critical Management Research* (2000, reprinted 2006 and 2007)
- Donna Ladkin's book on leadership (to be published in 2010)
- Thomas S. Kuhn, *The Structure of Scientific Revolutions* (third edition, 1996).