

# Social Connecting in Times of Physical Distance

## Final Report

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## Abstract

In the context of COVID-19, professional collaboration, and especially that in a virtual context, has moved to center stage. In order to ensure the quality of this virtual collaboration, it is all the more important that each individual feels included and that "social connecting" can thus take place. This creates the basic conditions for successful professional collaboration.

It is important that we distinguish "social connecting" from a purely sympathy-based connection. People in a team who like each other usually have no problem establishing and maintaining good connections with each other. However, if this leads to the formation of groups within a team in the form of an inner, sympathy-based circle and an outer circle, major problems can arise, especially in virtual settings. The members of the "outer circles" are clearly more at risk of becoming lonely in a home office situation.

Using the "Beyond Leadership" methodology as a possible form of collaboration, this preliminary study shows that "social connecting" can also take place successfully in a virtual context, regardless of pre-existing sympathies or antipathies. In a short time, it was possible to identify the same goals and values of the participants, which is a basic prerequisite for cooperation and successful collaboration. Success criteria for a "Social Connecting" in social distance were validated and presented on the basis of the elaborated I-P-O-I model (Input, Process, Outcome, Impact).

There is a need for further research on the impact of "Social Connecting" and its effect on the satisfaction with work and life in general and the future and competitiveness of companies in the virtual work context. Based on the developed I-P-O-I model "Social Connecting", further methods of virtual collaboration from the areas of group coaching and agile methods are to be used and tested for their effectiveness. The toolbox for virtual and physical "Social Connecting" resulting from a network platform for "Social Connecting" will help companies to achieve a suitable balance between successful physical and virtual collaboration. A corresponding research project is planned at the HWZ for 2021.

## Table of contents

<b>Abstract</b> .....	<b>2</b>
<b>Table of contents</b> .....	<b>3</b>
<b>1. Aim of the preliminary study</b> .....	<b>5</b>
<b>2. Literature research</b> .....	<b>5</b>
2.1 Input factors .....	6
2.1.1 Technology .....	6
2.1.2 Culture .....	6
2.1.3 Individual .....	7
2.1.4 Team .....	7
2.2 Process factors .....	7
2.3 Outcome variable: "Social Connecting" .....	7
2.4 Impact variable .....	8
2.5 Conclusion literature research .....	8
<b>3. Method</b> .....	<b>8</b>
3.1 Sample .....	8
3.2 Data collection procedure .....	8
<b>4. Research results</b> .....	<b>10</b>
4.1 Changing professional collaboration: virtual vs. physical context .....	10
4.2 Change in leadership: virtual vs. physical .....	11
4.3 Basic requirements for virtual collaboration .....	12
4.3.1 Team .....	12
4.3.2 Individual .....	13
4.3.3 Culture & values .....	13
4.3.4 Technology .....	13
4.4 Social Connecting nach der "Beyond Leadership"-Session .....	14
4.5 Reasons for "Social Connecting" .....	14
4.5.1 General format "Beyond Leadership" .....	15
4.5.2 Team .....	15
4.5.3 Individual: characteristics and behaviors of the other participants .....	16
4.5.4 Individual: Own characteristics and behaviors .....	16
4.5.5 Moderation .....	16
4.5.6 "virtual setting" .....	17
4.6 Benefits of Virtual Beyond Leadership .....	17
4.6.1 Content advantages .....	17

4.6.2 Practical advantages .....	18
4.7 Disadvantages of Virtual Beyond Leadership .....	18
4.8 Suggestions for improvement Implementation of Virtual Beyond Leadership .	19
4.8.1 Moderation .....	19
4.8.2 Technology .....	19
4.9 Recommendation: virtual vs. physical implementation of Beyond Leadership	19
4.9.1 Prior knowledge of "Beyond Leadership" .....	19
4.9.2 Content aspects .....	20
4.9.3 Participants.....	20
4.9.4 Group size .....	20
4.10 Impact .....	20
<b>5. conclusion research project.....</b>	<b>20</b>
<b>6. reference list .....</b>	<b>24</b>

## 1. Aim of the preliminary study

The preliminary study aims at elaborating important findings from science on the topic of "Social Connecting" in times of social distance and to validate and further develop them with a first empirical survey. Social Connecting creates the conditions for inclusive practices in a virtual context. In doing so, the uniqueness of each person and at the same time the desire to belong to the team is recognized even in times of social distance (Gibson 2020).

These findings will contribute as a basis for the design and further development of a virtual version of Beyond Leadership and provide insight into what success criteria make social connecting effective in a virtual setting.

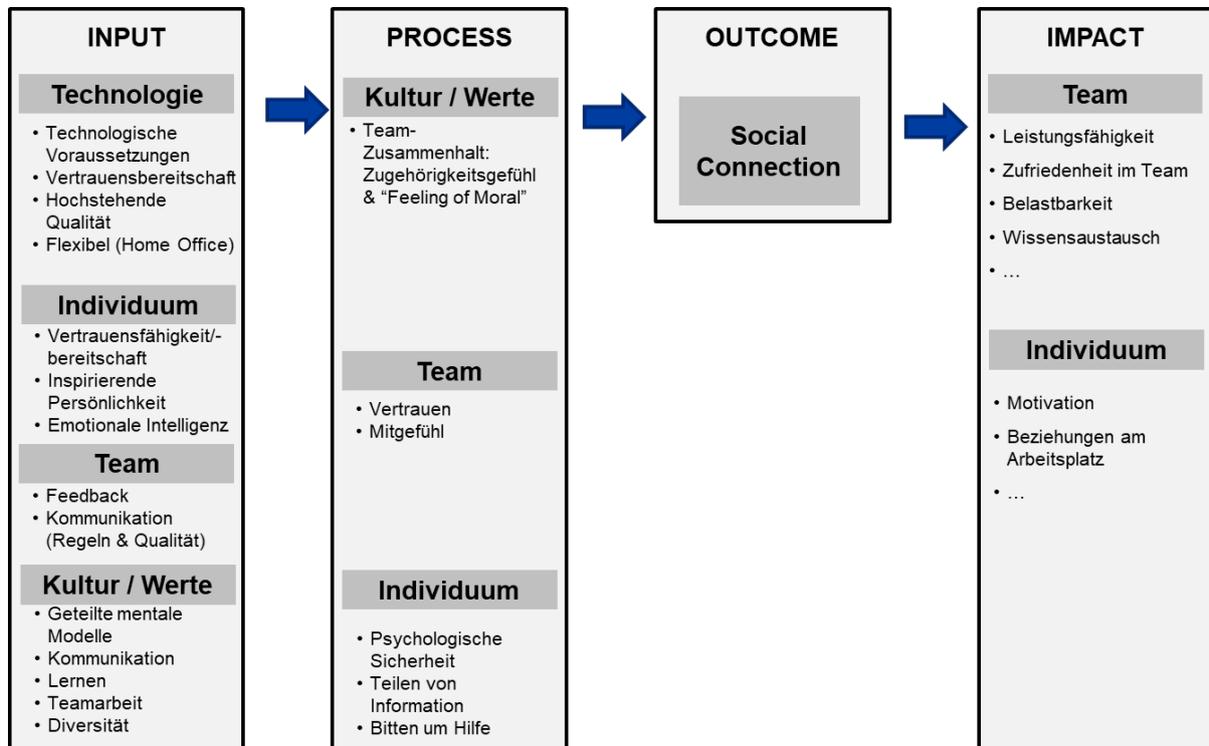
## 2. Literature research

According to recent research in social connecting, in the virtual context, shared leadership and empowering leadership take on a more important role for inclusive practices than the traditional understanding of leadership (Hertel et al., 2005; Hill & Bartol, 2016). That leadership roles are distributed among diverse team members is the essence of Beyond Leadership (Mölleney & Sachs, 2019). The Beyond Leadership concept thus fulfills an indispensable condition for the virtual context, which represents the starting point for all other success criteria.

The literature review in the area of virtual collaboration, virtual leadership and virtual teams allowed us to develop a first framework (see Figure 1) for Social Connecting in order to identify success factors for virtual collaboration and thus also "Beyond Leadership".

The Input-Process-Outcome Framework is a suitable framework to analyze and review virtual collaboration (Hoch & Kozlowski, 2014). We have added the impact aspect to this framework.

Figure 1: Social Connecting IPOI Framework



## 2.1 Input factors

Input factors represent those factors which are available as a basis and with which groups start virtual collaboration. Basic requirements for virtual collaboration can be derived from this. These can be divided into different categories.

### 2.1.1 Technology

For virtual collaboration to work, it is imperative that the **technological requirements are in place**, but also that people **are willing to trust the technology** (Choi & Cho, 2019). Virtual systems that are easy to use and enable interactions in a simple way contribute to trusting relationships in a virtual team. Companies also need to guarantee that the **technology works both in the office and from home** and that the **quality is high** so that people can work efficiently without any problems (Ford et al., 2017).

### 2.1.2 Culture

According to the literature review, **shared mental models** play a crucial role in virtual teams. Shared mental models are organized knowledge structures that allow people to interact with the environment and to recognize, remember, and form expectations about the behavior around the individual (Rouse & Morris, 1986). Such mental models are critical to success in a virtual context because they guarantee that one knows the individual team members and where the necessary information and resources are to work effectively as a team.

To make virtual collaboration successful, there must also be a culture that values **communication, learning, teamwork and diversity** (Brimm & . Murdock, 1998) This culture must prepare employees sufficiently for virtual collaboration.

## 2.1.3 Individual

The **willingness of** individuals to **trust each** other plays an important role so that trust can ultimately be built in a virtual setting and successful collaboration is possible (Levine, 2019). In addition, **inspiring personalities** in a group in a virtual context **can** promote identification of the group as a whole (Howell & Shamir, 2005). Individuals with high **emotional intelligence**, especially among leaders, are another important prerequisite for virtual collaboration to work (Mysirlaki & Paraskeva, 2019). Emotional intelligence is understood as the ability to perceive, assess, express, and regulate emotions (Mayer et al., 1997).

## 2.1.4 Team

Regular **feedback** is considered central to achieving good performance in virtual teams (Geister et al., 2006). Clear **norms and rules for communication** and coordination must be in place (Larson & DeChurch, 2020; Mysirlaki & Paraskeva, 2019). The **quality of communication** is also important here. Individuals must communicate in such a way that their concerns are clearly understood by others, facilitating collaboration (Chang & Wu, 2014).

## 2.2 Process factors

In general, it has been shown that mainly four process variables are of importance.

On the culture/values level, **team cohesion** is an important success factor in the virtual context (Mysirlaki & Paraskeva, 2019). This team cohesion is composed of the sense of belonging to a certain group and the "feeling of morality" related to membership with that group (Bollen & Hoyle, 1990).

At the team level, trust and compassion play an important role. If the basic prerequisites (input) are in place, participants can develop **trust in the** other people. Trust is particularly relevant in the virtual setting because people are physically far away from each other and with the help of trust the psychological distance can be reduced (Liao, 2017). In terms of **compassion**, Gibson (2020) elaborated on criteria in the context of the Corona pandemic that nevertheless evoke care in connecting in times of social distancing. Gibson (2020) sees compassion as an important factor for successful Care in Connecting to occur. Compassion is demonstrated through the following aspects: (1) *Inclusion*: differing opinions are considered while shared values and spirit are present. (2) *Co-Presence*: psychological closeness, which can be better achieved through certain technological tools (e.g., personal video messaging) than with others (e.g., email). (3) *Vitality*: Interaction with others can also give one energy in a virtual context and generate both positivity and resilience.

At the individual level, **psychological security** is increasingly discussed in the literature. This is understood to mean that one can be who one is without fear of negative consequences (Kahn, 1990). Such psychological safety becomes even more important in the online context (Zhang et al., 2010). In terms of individuals' behaviors, **sharing information** or **asking for help** was found to be particularly important in the virtual context (Breuer et al., 2020).

## 2.3 Outcome variable: "Social Connecting"

In this project, we are interested in which factors cause "Social Connecting", which is why this variable is our outcome variable. In the specific context of Beyond Leadership, we understand Social Connecting as the extent to which one knows a person personally. This means that if a "Social Connecting" is present after a "Beyond Leadership" session, one was able to get to know the other person(s) well or to get to know additional/different aspects of the person (if one already knew the person beforehand).

## 2.4 Impact variable

Successful social connecting can bring many positive benefits. These include increased team performance or team satisfaction (Dulebohn & Hoch, 2017; Mysirlaki & Paraskeva, 2019). Social connecting as part of virtual leadership can additionally have positive effects on individual performance. This can be evident in increased motivation and improved workplace relationships (including increased loyalty), among other things (Liao, 2017).

## 2.5 Conclusion literature research

All in all, this literature review has shown that, on the one hand, basic requirements for virtual collaboration and, on the other hand, process variables can be decisive for the success of "social connecting". This theoretical framework will be further developed with an initial data collection.

## 3. Method

### 3.1 Sample

The first group consisted of 13 participants, some of whom already had experience with Beyond Leadership. The participants were not part of a fixed team, but knew each other in part from the Initiative Zukunftsfähige Führung (IZF). The second group consisted of 8 participants from the same company, i.e. the participants already knew each other and the Beyond Leadership method was used to discuss a specific "center point".

### 3.2 Data collection procedure

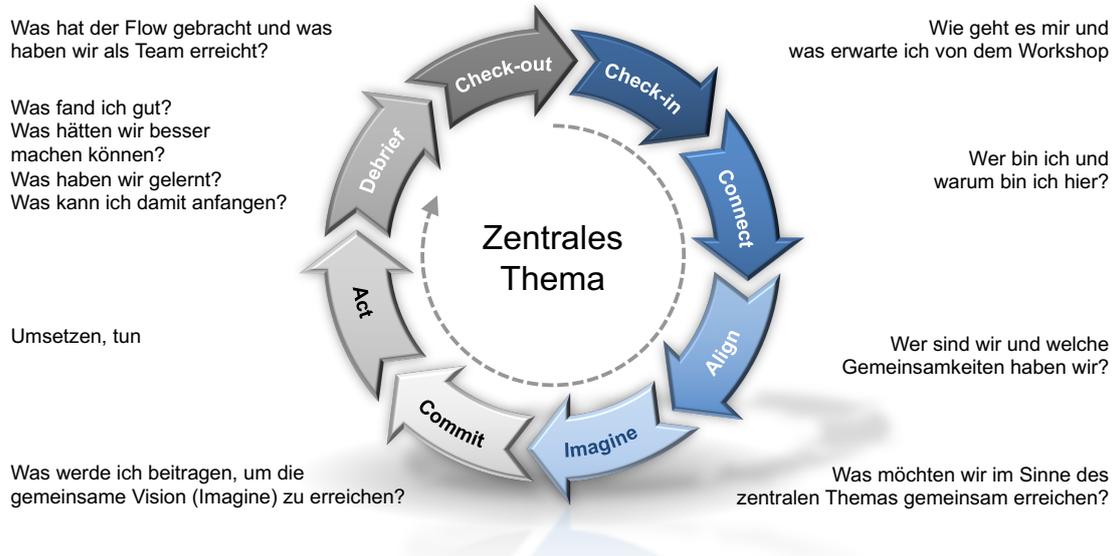
In order to extend the theoretical findings, the "Beyond Leadership" methodology was carried out virtually via Zoom with both groups. Before and after each, 30-minute interviews were done, also via Zoom. The interviews prior to the Beyond Leadership session served to learn more about the (1) general perceived change in collaboration and leadership in virtual and physical contexts, (2) individual experiences, and (3) perceived basic requirements for virtual collaboration.

The interviews following the "Beyond Leadership" session aimed to (1) assess the extent of "social connection" thanks to the method, (2) elicit the reasons for it, and (3) identify initial possible impact variables. In addition, general advantages and disadvantages of virtual collaboration were identified based on both rounds of interviews. An interview question guide was created for each of these interviews. The questions were based on the main categories anchored in theory.

In the "Beyond Leadership" session, each of the following phases up to and including "Commit" were conducted (see Figure 2):

**Figure 2: Phases of Beyond Leadership**

## Beyond Leadership Activation



## 4. Research results

The research findings presented below highlight the commonalities of the participant interviews analyzed.

### 4.1 Changing professional collaboration: virtual vs. physical context

According to the participants, **about 80% of the professional collaboration takes place virtually at the moment**, whereby the virtuality has decreased again a little compared to the spring. Before the lockdown, this ratio was practically reversed and about 80% of professional collaboration took place physically.

With an increasingly virtual collaboration, changes in professional collaboration were perceived. The interviews indicate that virtual collaboration requires **more planning and organization**. People no longer come to meetings spontaneously without an occasion, which is why appointments have to be actively arranged. Practically everything has to be planned.

Virtual collaboration is seen as **faster, more efficient and more productive**, and people can take advantage of idle time, which is more difficult in the physical setting. This is closely linked to the fact that people are more likely to focus **on the essentials**. Meetings have become more focused on the work content and one digresses less. On the other hand, there are influences in the virtual context that more easily tempt people to become **distracted**. The participants' experiences with virtual work mentioned in the interviews varied greatly in this respect depending on their area of responsibility and function in the team.

However, the increased productivity and focus on the essentials is also contradicted by the **possible extra work that** can arise because things cannot be clarified immediately in person and so e-mails have to be sent back and forth several times.

Another change in collaboration was perceived regarding the fact that virtually you have **less overview of the people present**, which can make collaboration more difficult. Physically, you have more opportunities to single someone out. People can "hide" more in the virtual context and also do things on the side. This also makes it harder to assess people's reactions.

In addition, virtual collaboration is characterized by **less social exchange and thus the suffering of the interpersonal**. Communication "between door and door" is lost and emotional topics are more difficult to address because emotions are no longer clearly perceptible and interpreting body language becomes more difficult and exhausting. This makes it more difficult to lead discussions, for example. To compensate for the loss of the interpersonal, "extra meetings" can be arranged to explicitly find time to discuss non-work topics.

Virtual work was described by some participants as **more monotonous than in the physical context** and technology in general as a **stress factor**. In contrast, some people appreciated the **new possibilities of virtual work**, such as the simplified sharing of documents or the offer of digital workshops (e.g. short meditation, live cooking).

The use of a particular technology for virtual work depends strongly on the work modality as well as the objective of a work process. However, on the basis of the interviews, it was possible to establish that the **use of telephone calls and e-mails in the virtual context is decreasing and** being replaced by video conferencing software and "instant messaging".

Regarding the individuals, the participants noted that some have a harder time with the virtual context than others, which manifests itself in the **use of different means of communication**. One participant mentioned a difference between generations. However, what factors lead to the difference in individuals' adaptation to the virtual context requires further investigation.

## 4.2 Change in leadership: virtual vs. physical

According to the interview partners' assessments, **communication** gains in importance in the virtual leadership context. On the one hand, people communicate **more often in order** to maintain contact as much as possible. In addition, communication is perceived as **shorter and clearer**.

Leadership in a virtual context also means leading on a **more individual basis** and responding personally to individual employees. This also means actively approaching employees, focusing on interpersonal relationships, and asking more often how things are going. Such aspects happen more spontaneously in the physical setting. In the virtual context, interpersonal issues have to be planned for more actively.

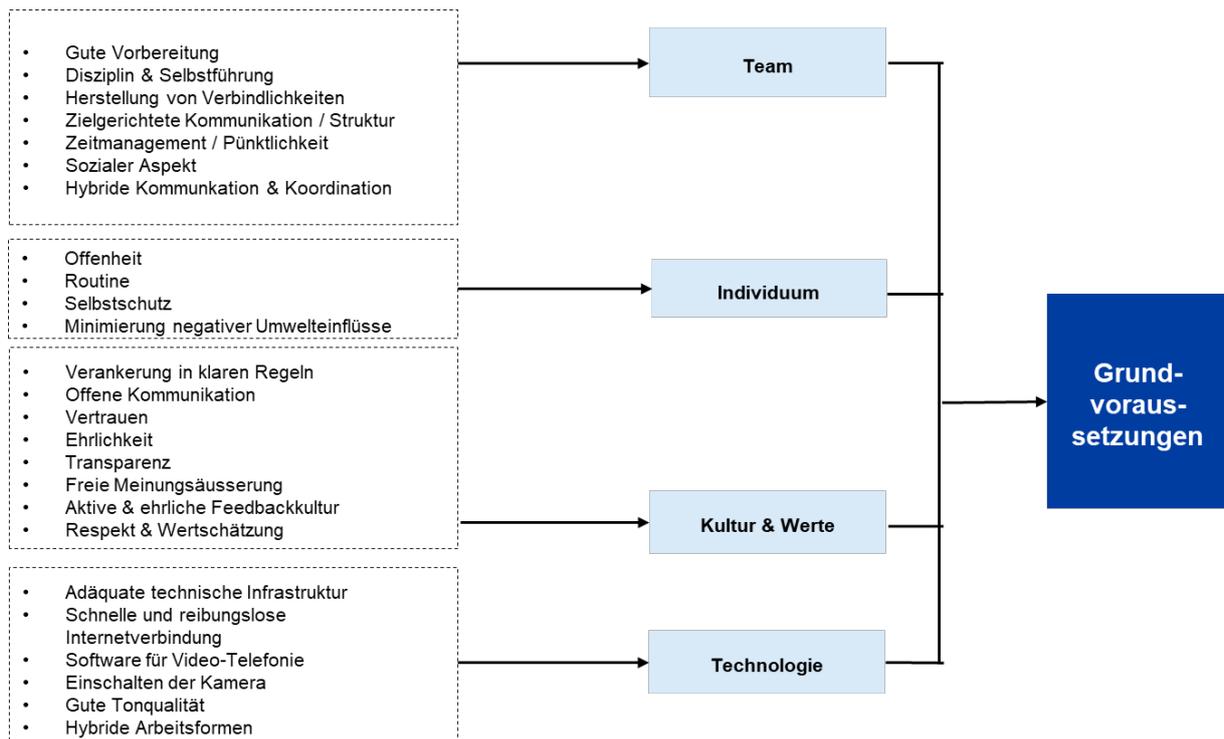
Building a **basis of trust** is considered very important in the virtual context. This goes hand in hand with handing over personal responsibility and relinquishing control. You have to give people the opportunity to organize themselves.

In this context, regular **feedback** also plays an important role. Employees should receive more regular feedback on their work, especially if they do not see each other physically on a regular basis.

## 4.3 Basic requirements for virtual collaboration

The basic requirements for virtual collaboration can be divided into the following categories, which are discussed below: Team, Individual, Culture & Values, and Technology. These categories were adopted based on the literature review. Figure 3 graphically summarizes the findings of this chapter.

**Figure 3: Basic prerequisite for virtual collaboration**



### 4.3.1 Team

Communication and coordination in a team in a virtual context require **good preparation** on the part of the team members, especially for meetings. This includes **discipline and self-leadership**, so that work steps and processes as well as associated documents are coordinated and clear. Consciously **creating commitment** remains relevant in the virtual context as well.

Structure in teamwork can be conveyed through **targeted communication** (e.g., active moderation, see Chapter 4.5.5), which also increases the binding nature of decisions. Asking about the understanding of the communicated message contributes to common understanding.

**Time management** must be adapted to the virtual context, especially regarding virtual meetings. Clearly defined time windows allow an optimal allocation of energy during a working day. The participants mentioned that meetings should tend to be shorter than in the physical context. In addition, **punctuality is** a key prerequisite for collaboration in a virtual context, as online meetings usually start and end on time.

The life of the **social aspect**, which many participants perceived as lost to a certain extent in the virtual context, plays a central role in virtual teamwork. Building humanity on the emotional level, explicitly asking about people's well-being and interests, and actively addressing fears are essential here.

Although team **coordination in** a virtual context is often equated with coordination in a physical context, the former is perceived as more flexible and shorter-term. A **hybrid** form of

communication and coordination in the team was perceived as optimal by some participants and clearly preferred to pure virtual communication and coordination.

## 4.3.2 Individual

**Openness** to the virtual context determines, among other things, how easily an individual adapts to the new context, whereby the participants found strong differences between individuals in this regard. According to the participants, the behavior of extroverted and introverted individuals does not differ significantly from the physical context. For shy individuals, however, it can lead to more difficulties depending on the situation ("compulsion to be in visual focus"). With regard to confidential matters, a general reservation was noted when these had to be communicated via video call, but this can be overcome by exemplifying openness.

**Routine** in the virtual work context gives employees security and can minimize "rigid" behavior. Routine should also be accompanied by **self-protection for employees in order** to optimally reconcile working hours, which tend to be longer in the virtual context than in the physical context, with their private lives.

**Environmental influences** have a direct impact on an individual's focus on their work. In the virtual context, an adequate home office can lead to higher productivity and active participation due to higher attention and concentration. Consequently, it is important to understand the physical contexts in which individuals find themselves in the virtual context. Depending on the residential and family situation, a hybrid work arrangement may be an ideal solution.

## 4.3.3 Culture & values

Strong shared values anchored in the organizational/work culture are also essential in the virtual context and should be adapted to it. These values should be set out in **clear rules** (incl. team principles). For example, the confidentiality of virtual conversations must be clearly regulated: who is listening to everything?

**Open communication** was named as a priority by the participants, whereby basically the same shared values were felt to be relevant in the virtual context as in the physical context.

**Trust, honesty and transparency take on a** new role insofar as control takes on a different form in the virtual context and individuals can "hide" more easily. The **free expression of opinions** and joint involvement of all participants also play a central role here, since the virtual work context is generally perceived as more distant. An **active and honest feedback culture** can overcome this distance.

**Respect and appreciation are** also considered indispensable values in the virtual context, and participants associated these in particular with letting people finish during meetings.

## 4.3.4 Technology

The existence of an **adequate technical infrastructure**, which among other things allows interactive and productive work, is indispensable in the virtual context. Particular attention must be paid to a **fast and smooth Internet connection**.

**Software for video telephony** and holding meetings that guarantee smooth synchronization of image and sound is of great importance in the virtual context. **Turning on the camera** can lead to more personal conversations than by phone, as it additionally incorporates non-verbal communication, which usually leads to faster establishment of a relationship with the counterpart.

Several participants mentioned the relevance of ensuring **good sound quality** in the virtual context, especially for longer calls.

Where desired and possible, care should be taken to ensure that the technical infrastructure allows for **hybrid forms of work in order** to meet the needs of all individuals as best as possible.

## 4.4 Social Connecting nach der "Beyond Leadership"-Session

In a first step, it was of interest to what extent a "social connecting" had taken place thanks to the virtual "Beyond Leadership" session. The feeling of inclusion of the individual in the "social connecting" (Gibson, 2020) was surveyed according to the criterion of the extent to which the individuals were able to get to know each other (better) in the context of the session. This question was asked using a scale from 1 = "not at all better/good" to 10 = "very good/much better."

If the persons already knew each other, the aim was to find out to what extent the persons were able to get to know new aspects of the person. Some of the respondents stated that they were **able to get to know the persons even better** (scale values between 5 and 9). New aspects were discovered. For example, one interviewer stated that people got to know each other in a different way than usual. One learned things that one did not know about the person before (e.g., private things). The session also contributed to getting to know each other better in terms of a **trusting relationship**. Another part of the respondents of the 2nd group, could get to know their team members more intensively, but this session confirmed their "physical" appearance. In this sense, not so many new aspects were discovered in this group.

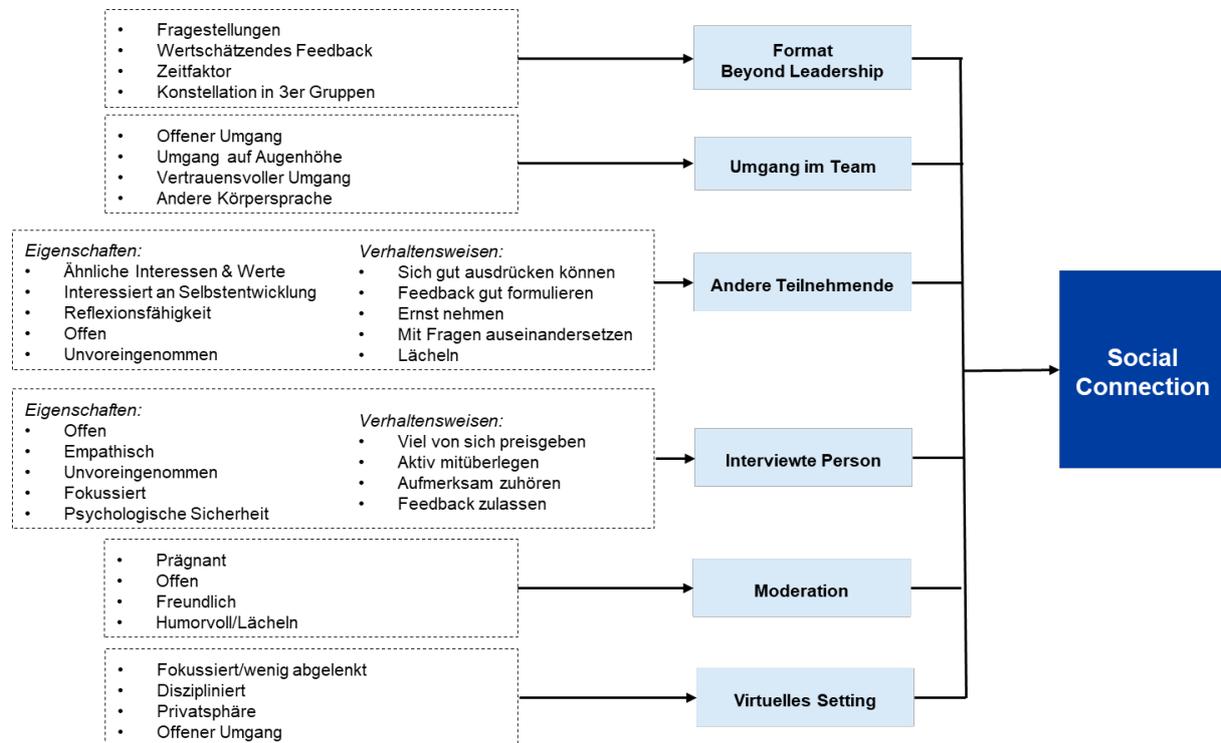
A connection could also be established with people who did not yet know each other. However, the scale values varied greatly, from 3 to 10.

Some participants suggested capturing "social connecting" using a scale from 1= "unknown person" to 10= "good friends."

## 4.5 Reasons for "Social Connecting

Different reasons were given as to why participants were able to get to know each other better through the Beyond Leadership Session. As expected, some of these reasons had strong overlaps with the basic prerequisites and process variables for virtual collaboration, which is why the same main categories are used. The main category "individual" was divided into "characteristics and behaviors of other team members" and "own characteristics and behaviors". In addition, three new main categories were formed, specifically related to methodology (4.6.1, 4.6.5) and virtual setting (4.6.6). These reasons can be considered success criteria for a Virtual Beyond Leadership. Figure 4 summarizes these success criteria graphically.

Figure 4: "Virtual Beyond Leadership" success criteria



## 4.5.1 General format "Beyond Leadership"

The general format of "Beyond Leadership" contains essential components that have enabled "Social Connecting."

Thus, through the **questions of** the method (e.g. "Who am I and why am I here?"), the personal is on the agenda without having to talk about professional topics. Avoiding "small talk" makes it possible to get to know new perspectives of the person.

In addition, the **appreciative feedback** - a central component of the method - was crucial for the further course of the session. Through the positive feedback, a "social connecting" was promoted.

The third point mentioned was the **time factor**. The method requires participants to focus on themselves personally within a very short time and to get to the point. A "social connecting" was therefore possible very quickly. According to the participants, this connection would probably not have been established so quickly in other formats.

In the 1st group the breakout sessions were conducted in groups of 2, in the 2nd group in groups of 3. While the group of 2 had advantages compared to the group of 3, such as more intimacy and that the participants felt less exposed, on the whole **the constellation of 3 was perceived as more positive**. According to the participants, this constellation simulated a natural conversation. In addition, a stronger dynamic was perceived. The fact that one receives appreciative feedback twice was perceived as very positive. The content of this feedback was also very individual. The participants also did not have the feeling that the feedbacks were repetitive, quite the opposite: the increased input was perceived as very enriching and one received more opinions on a certain topic. Overall, you get more impressions in threes, whereas a constellation of 2 would possibly be more one-sided.

## 4.5.2 Team

Aspects of interaction in the individual group constellations also contributed to "social connecting". The **open way of dealing with** each other was frequently mentioned. The participants

got involved in the situation and came to the setting in a positive mood. Regardless of the group constellation, the interaction was characterized by openness and informality.

Communication was characterized by **eye-to-eye interaction**. The participants felt equal, even when different people from different positions met. You could always say what you wanted. The **psychological security** - to give oneself as one is, without fear of negative consequences - was therefore very high.

The interaction was also described as **trusting**. This aspect is closely related to dealing at eye level: Coming to a common point together with very different individuals was perceived as an expression of trust.

Because the participants took part in the setting in their usual environment, the **body language** was also different (e.g. different clothing). This aspect also contributed to the fact that communication was more at eye level and status symbols were omitted.

### 4.5.3 Individual: characteristics and behaviors of the other participants

**Characteristics.** The interviewees perceived certain characteristics of the other participants that contributed to "social connecting". Participants were perceived as having **similar values and interests to their own**, engaging in **self-development**, and also having very good **reflective skills**. These aspects facilitate the formulation of personal perceptions. Consistent with the open interaction with each other (see above), the other participants were assessed as **open**. Curiosity and positivity characterized the participants. The participants came **without prejudice** and there were no reservations about the setting, but also about the other participants.

**Behaviors.** Different perceived behaviors of the other participants could contribute to "social connecting". In the individual rounds, it was observed that people were very **good at expressing** themselves and talking about personal things. The participants had the feeling that the respective **feedback** was **well thought out**, that the person had **dealt with the question** and that the person was **taken seriously**. Last but not least, the regular **smiles** of the participants had helped them to connect and feel comfortable.

### 4.5.4 Individual: Own characteristics and behaviors

**Characteristics.** By and large, the characteristics and behaviors that the interviewees had perceived in the other participants (see above) were also perceived by themselves. For example, the interviewees perceived themselves as **open, empathetic, and unbiased**. They had also perceived themselves as very **focused** in the sense of concentrated, but also thematically (focus on the positive).

**Behavioral patterns.** Because the interviewees felt comfortable, they also **revealed a lot about themselves**. They were able to "speak freely," even if it was sometimes an unfamiliar feeling for them. They had **actively considered** what the individual questions meant to them and how they could contribute to the group.

They had also perceived themselves as attentive **listeners** and as people who **allow feedback**.

### 4.5.5 Moderation

The facilitator also contributed to the fact that the basic building blocks for "social connecting" were in place; on the one hand thanks to the nature/personality of the facilitator, on the other hand thanks to the approach.

**Personal manner.** The presenter's **concise, open, easy-going, friendly and humorous manner** made the participants feel comfortable and trust the presenter right from the start. He had a **lot of smiles**, which carried over to the mood of the others, even in the breakout sessions.

**Procedure.** The moderator's approach was very **structured and understandable**. He had also repeated things several times, which was perceived as positive. In addition, there were never any open questions when one was assigned to a breakout session. It was also perceived as positive that he **accompanied the process** (technical role), but remained uninvolved in the conversations in the breakout sessions and did not witness them in terms of content. This allowed the participants to remain undisturbed among themselves.

The moderator had **kept to the time limit**. This was very much appreciated and is considered even more important in online settings, because often participants are less flexible due to the many virtual meetings.

The **breaks** given by the moderator were also seen as positive and necessary. The **interaction with the Google Jamboard** offered enough variety.

#### 4.5.6 "virtual setting"

Participants also mentioned specific aspects related to the virtual setting as reasons for "social connecting." In particular, the virtual setting allowed them to **focus and concentrate**. One has fewer distractions and one is fully focused on the other person. In addition, the **discipline** described above was attributed to the virtual setting. Overall, many advantages were associated with the virtual setting, which are explained in more detail in section 4.7.

### 4.6 Benefits of Virtual Beyond Leadership

Overall, the virtual variant can have the advantage of (1) better understanding, (2) better absorption (3) and further processing of information. These aspects were often compared with the physical setting, which is why advantages and disadvantages of the physical variant are also described in isolated cases.

#### 4.6.1 Content advantages

Participants also recognized content-related advantages of the virtual setting. Thanks to the virtual setting, one is **more focused or less distracted by** the breakout sessions than in physical settings. There is no opportunity to look around and observe the other groups. One is also less distracted by the physical appearance, and less likely to think in "pigeonholes." There is also less distraction from smells or background noise, and for the most part people understand each other better acoustically, which is a practical advantage (see below). Distractions by non-verbal signs also play a smaller role in the virtual setting. This focus had led in the setting to really taking time for the person.

The virtual setting also allowed for more **intimacy and privacy**, according to the participants. The participants were in their personal environment, which made the whole situation more confidential. In addition, the camera gave an impression of how the person lives in private (e.g., furnishings), which meant that some aspects of the person could be taken away. Through the background, the participants could make a statement about what they wanted to reveal about themselves and what they did not want to reveal. Also the time details in the form of chat messages were perceived as more private and personal.

Another advantage mentioned was the **strong discipline** due to the clearly defined structure. This discipline is made all the stronger by the minimization of distracting factors in the virtual setting. The virtual setting is therefore particularly suitable for working intensively on a topic in a concentrated, speedy and targeted manner.

According to the participants, the **open interaction with** each other (see above) was strengthened thanks to the virtual setting. The fact that the participants took part from a place where they felt comfortable also made it easier for them to open up. This openness was not only present in the breakout sessions, but also when everyone was in the same virtual room.

In contrast, according to participants, the physical setting often exhibits a reserved mood and has a much stronger workshop character, which creates distance between participants.

## 4.6.2 Practical advantages

The virtual setting has the advantage that it is **faster to implement and therefore** more **efficient**. On the one hand, this aspect refers to the fact that it is less time-consuming to organize. All logistical issues are eliminated. Online appointment setting is also less complicated. On the other hand, there are also time gains in the implementation of the method itself: A protected space (the breakout session) is created more quickly, where participants can exchange ideas without being disturbed. The breaks in between can also be better observed and the "time losses" between the individual breakout sessions are minimized. Participants from different locations can also take part, which would not have been an option for a physical setting. The timing in the chat function also did not interrupt the flow of the session, as is often the case in physical settings.

These statements are closely related to the structuring possibilities of the two settings. Overall, the virtual setting was perceived as **more structured** than the physical setting, in which the tendency to digress is much greater.

The **random division** into groups was also mentioned as an advantage of the virtual setting. Thanks to the random division, there was (1) a surprise effect, which lightened the mood even more, (2) the participants did not have to make a decision themselves, and (3) one exchanged ideas with people with whom one would otherwise not necessarily exchange ideas (e.g., due to prejudices).

## 4.7 Disadvantages of Virtual Beyond Leadership

Although the virtual variant has many advantages according to the participants, disadvantages were also noted.

Even though the short sequences in the respective groups can be attributed to the method itself, the extreme **"time boxing"** was perceived as an aspect that is even more visible in the virtual setting. Practically without interruptions, the participants were transferred from one constellation to the other, which also caused stress. As a result, they simply felt they had too little time to get to know the person properly. This stands as an antithesis to the "efficiency" and "focus" gained (see above).

In addition, some disadvantages directly related to the **technology were** addressed. For example, the Google Jamboard (the platform for interaction) did not work for everyone. This resulted in distractions. In addition, the **random division** into groups was welcomed (see advantages), but it did **not always work**. Repeatedly, people were told that they were always in the same group with the same people.

The way of the breaks was also mentioned as a disadvantage. So one was alone in the breaks and could not exchange with the others, even if one had the need. The **social exchange was thus rather lost**, which would have been present in a physical setting.

In addition, some found the session **tiring** due to the fact that they had to sit at the laptop for 2 hours at a stretch. Loosening up options would help at this point, but these are more likely to be used in physical settings.

It was also mentioned that the **filter from the screen** can be a **barrier to** the person and hinders intimacy. This barrier also leads to the fact that one could intervene less well in certain situations (e.g., if someone cries).

Overall, however, the advantages clearly outweighed the disadvantages.

## 4.8 Suggestions for improvement Implementation of Virtual Beyond Leadership

The participants suggested valuable improvements for a successful and smooth implementation of "Virtual Beyond Leadership", on the one hand regarding the moderation, on the other hand regarding technical aspects.

### 4.8.1 Moderation

At the beginning of each Beyond Leadership session, the format is briefly explained. However, so that the introduction does not become too detailed and take up too much time, it was suggested that the **"Beyond Leadership" introduction** be designed **visually**. Then the most important explanatory points could be presented briefly and concisely on 1-2 slides or in the form of a short video, or even sent to the participants in advance.

The **instructions within the chat function** could also be partially improved: 10 seconds before the time runs out during which the person is speaking, the signal "Now end" could appear. Following this, the instruction "Now please give feedback" would make it clear that the feedback round is starting.

The moderator could also **bridge more between the breakout sessions** and generally take more time. This way, the process would be perceived as less stressful.

The moderator could also play a **coordinating role** at the end of the session. For participants who did not know each other yet, there was a need to exchange contact details. Unfortunately, there was no time for this at the end of the session. So the facilitator could provide a list (if possible) or coordinate at the end of the session that contact details are exchanged. This is also an important point so that the valuable ideas that arise in such a session can also be developed further.

### 4.8.2 Technology

For one thing, the **time given** by the moderator and the time displayed did not always quite match, which took some getting used to, especially at the beginning. It would be useful to achieve **consistency in** this respect. The time information was also communicated via a chat function, which was not perceived in some cases. An **acoustic signal for the time information** would be helpful to clearly draw attention to it.

As mentioned above, the group assignment was rather one-sided despite the random generator. A technique that allows the **group assignment to be** completely recreated for each round would therefore be useful.

Lastly, it was suggested to test and launch the necessary **technical tools** (Zoom, Google Jamboard) in advance, if possible, to prevent technical problems.

## 4.9 Recommendation: virtual vs. physical implementation of Beyond Leadership

When asked which variant (virtual vs. physical) of Beyond Leadership one would rather recommend to a good friend, there was no clear answer, as both variants have their advantages and disadvantages. Moreover, this was difficult to assess for some participants, as they had not yet had any experience with the physical setting.

Which variant is most suitable depends on various factors. The main determining factors are: Prior knowledge of Beyond Leadership, content, and group characteristics.

### 4.9.1 Prior knowledge of "Beyond Leadership"

If the participants are not yet familiar with the format, it makes sense to conduct the method physically. The strict and efficient procedure in the virtual version has the disadvantage for

newcomers of feeling stressed and possibly not absorbing all the necessary aspects. In addition, fewer questions are asked online, which is very important, especially at the beginning. Once you know the format and have won over the people for it, the virtual variant is very suitable and the advantages mentioned above can be fully exploited.

## 4.9.2 Content aspects

The impressions of the interviews showed that it might be useful to conduct "Beyond Leadership" physically if you have to deal with a difficult topic (e.g. intergenerational conflicts, change processes).

## 4.9.3 Participants

If the participants do not know each other, it is considered sensible to choose the physical variant in order to be able to establish a personal connection with the participants. Even if it is known that the participants are less technology-savvy per se, the physical variant should be chosen.

If the participants already know each other and are also open to new technologies, the virtual variant can very happily be used.

The geographical distribution of the participants is also a decision criterion. If the participants are in different locations, the virtual variant is more suitable for practical reasons.

## 4.9.4 Group size

For larger groups, it might make more sense to choose the physical option. It is then easier to talk to all participants and to network. The clarity would be lost in a virtual setting with large groups.

## 4.10 Impact

Finally, the participants were asked to provide information on whether something could arise from the "Social Connecting" in the future (e.g. better cooperation, joint projects; can refer to a single person). This question was easier to answer in the 1st group than in the 2nd group.

Arguments that no joint projects can arise from the session, or rather fewer, were on the one hand the **lack of context and the lack of structure** so that something concrete can come out of it. In addition, the individual **breakout sessions** were perceived as **too short to** convey enough content at all.

Arguments for the emergence of something greater from the formed social connecting were that, despite the short time, one noticed whether the counterpart represented the **same goals and values**, which is necessary as a basis for cooperation and decisive for success. This "sense" of whether the other person is a good fit for cooperation could also be experienced in the appreciation part in particular.

## 5. conclusion research project

This preliminary study on the topic of "Social Connecting" forms the basis for the **further development of a virtual version of the "Beyond Leadership" method** and provides information on which **success criteria** make **Social Connecting** effective in a **virtual setting**. For this purpose, the Beyond Leadership method was applied virtually with 21 people in two groups via Zoom, and one interview per person was conducted before and after the session.

The research results are summarized in the **I-P-O-I model** (Input, Process, Outcome, Impact) in Figure 5. This model forms the basis for **analyzing other methods of virtual and**

**physical social connecting in a next step**, and in particular for identifying differences in process and impact.

With regard to the **basic requirements for virtual collaboration (input)**, numerous factors were identified in the four categories of team (e.g., goal-oriented communication, discipline & self-leadership), individual (e.g., openness, routine), culture and values (e.g., trust, honesty), and technology (e.g., adequate technical infrastructure, hybrid forms of work).

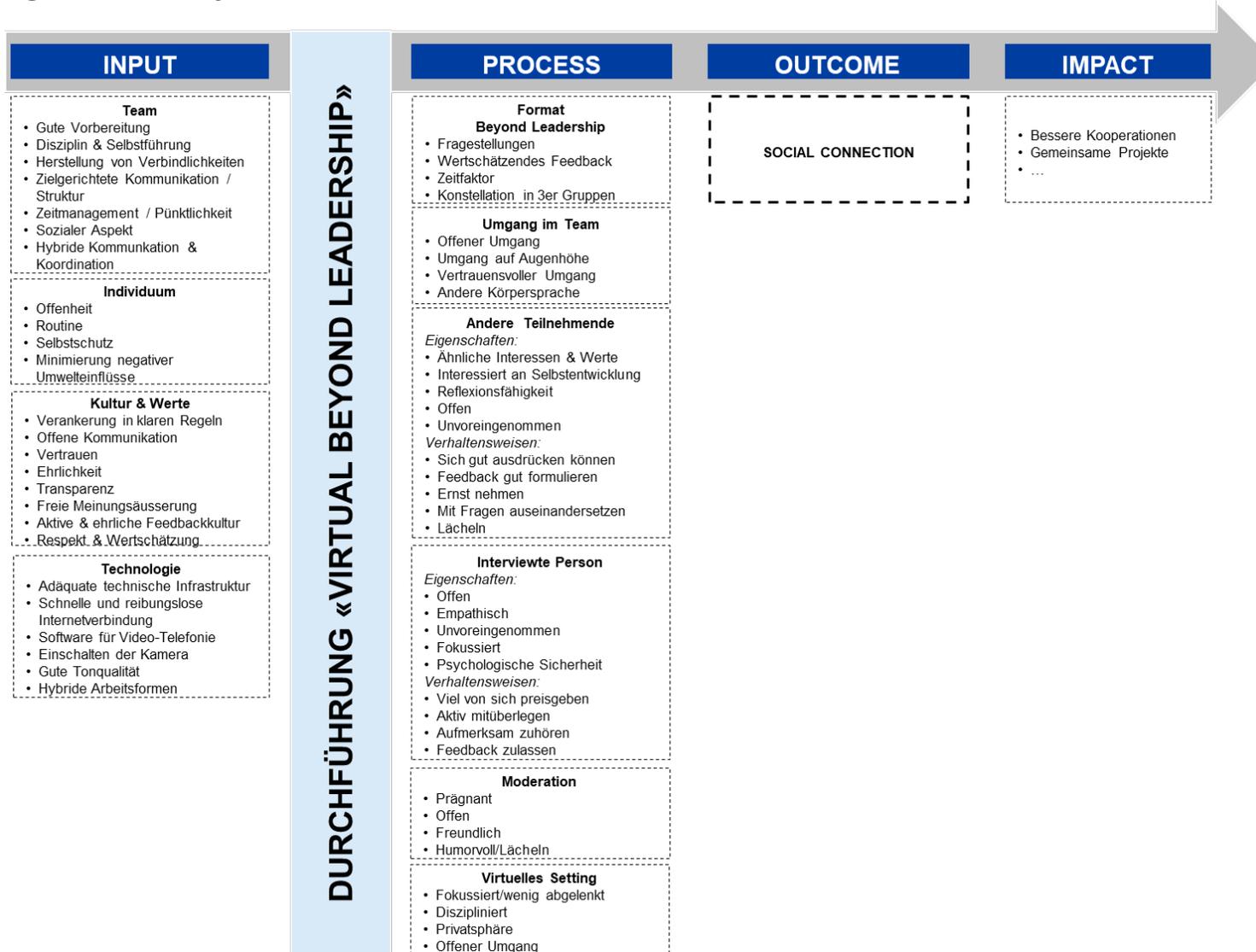
The **reasons for Social Connecting (Process)** in Virtual Beyond Leadership can be traced back to the Beyond Leadership format (e.g., personal at the center of the agenda, appreciative feedback), team (e.g., open interaction, psychological safety), characteristics and behaviors of other participants and the individuals themselves, facilitation (e.g., open, concise), and the virtual setting (e.g., higher focus, privacy in breakout sessions).

The study shows that **social connecting (outcome)** using the "Beyond Leadership" method also works in the virtual setting. People who already knew each other and those who did not yet know each other also got to know each other better in the virtual setting in the sense of a trusting relationship.

The development of something **further of virtual social connecting (impact)** requires more profound investigation. However, the preliminary study shows that participants were able to identify common goals and values in a short period of time, which is a basic requirement for collaboration. Nevertheless, the short breakout sessions and a lack of context and structure hindered the development of collaboration beyond the Beyond Leadership session.

The participants did not have a clear preference as to when "Beyond Leadership" should be conducted physically or virtually. Nevertheless, the study shows **factors that speak for or against the use of "Virtual Beyond Leadership"** (see Figure 6). **"Virtual Beyond Leadership"** is particularly appealing when there is familiarity with the physical version and participants are geographically dispersed. The physical setting is particularly suitable if the participants do not yet know each other, difficult topics are on the agenda and a large number of people are taking part in Beyond Leadership.

Figure 5: Summary of research results



**Figure 6: Factors for and against an application of Virtual Beyond Leadership**

Pro	Contra
<ul style="list-style-type: none"> <li>• Vertrautheit mit der physischen Variante</li> <li>• Teilnehmende geographisch verteilt</li> </ul>	<ul style="list-style-type: none"> <li>• Teilnehmende kennen sich nicht</li> <li>• Schwierige Themen auf der Agenda</li> <li>• Grosse Anzahl Teilnehmende</li> </ul>

Figure 7 compares the **advantages with the disadvantages of "Virtual Beyond Leadership"**. The advantages in terms of content relate in particular to the increased focus on the information conveyed as well as more privacy. The practical advantages include faster and more efficient implementation and factors associated with the technical possibilities (e.g. breakout sessions). Disadvantages of the virtual implementation of "Beyond Leadership" are, apart from the increased visibility and the "time boxing", mainly in the general context of virtual work (lack of networking, monotonous setting, technical problems).

**Figure 7: Advantages and disadvantages of Virtual Beyond Leadership**

Vorteile	Nachteile
<p><i>Inhaltlich:</i></p> <ul style="list-style-type: none"> <li>• Bessere Aufnahme und Weiterverarbeitung von Informationen: fokussierter auf Person</li> <li>• Mehr Intimität/Privatsphäre (Breakout-Rooms als geschützte Räume)</li> <li>• Starke Disziplin durch klar vorgegebene Struktur</li> <li>• Verstärkung des offenen Umgangs: weniger Workshop-Charakter; Teilnahme von gewohntem Ort</li> </ul> <p><i>Praktisch:</i></p> <ul style="list-style-type: none"> <li>• Strukturierter: kleinere Tendenz abzuschweifen</li> <li>• Zufällige Gruppeneinteilung</li> </ul>	<ul style="list-style-type: none"> <li>• Höhere Visibilität des extremen «Time Boxing»</li> <li>• Gefahr technischer Probleme</li> <li>• Pausen: kein sozialer Austausch (Networking)</li> <li>• Ermüdend da monotones Setting vor PC (2h am Stück)</li> <li>• Bildschirm als zusätzliche Distanz zur Person</li> </ul>

The I-P-O-I Social Connecting model now forms the basis for an investigation into how companies can achieve a suitable balance between physical and virtual collaboration. The model is not only relevant for virtual collaboration in the home office, but also for any kind of remote work (e.g. co-working spaces). Different methods are to be used and further developed in order to develop a toolbox for virtual and physical social connecting, which can be made available to a wide range of companies within the framework of a network platform.

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