

UNDERSTANDING LEADERSHIP OF REMOTE WORK: A TEACHING CASE ON HOW AUTHENTIC LEADERSHIP CAN IMPROVE REMOTE WORK OUTCOMES

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ABSTRACT

The COVID-19 pandemic forced many companies to shift to remote work. As the world opens back up, many companies found the benefits of remote work and have decided to adapt a hybrid approach or even make remote work permanent. This teaching case highlights several leadership challenges arising from a remote workforce. It explores how management can improve outcomes through Authentic Leadership. This case is designed to augment Authentic Leadership instruction as well as apply it to unique challenges that arise with a remote workforce.

Keywords: Authentic Leadership, Management, Remote Work, COVID

INTRODUCTION

On a cool Florida afternoon in late January 2022, Nancy, Gary, and their management team of Xcira sat in their respective houses and participated in a video conference call. Even after many months of remote meetings, it still felt odd to Nancy. She knew it was now the new normal and she needed to adapt. At the start of the COVID-19 pandemic, Xcira had decided that all employees would begin working remotely. No one expected that it would last as long as it did, or that they would be considering making remote work permanent. Within the next three months their expensive office lease would need to be renewed so they had to decide if they would make remote work permanent or if they would have their workforce go back to the office.

After a few moments of informal chitchat, Nancy began the meeting. “Our business, our culture, and our people have changed over the last several months due to the pandemic. We are an incredibly resilient bunch. Over the last several months, most of us have moved into home offices with imperfect environments, some working from their kitchen tables while their kids played games around them. This has been difficult; and we have mostly done well.”

Gary interjected, “But is this sustainable long term? I know it is beginning to take a toll on many of you and many of our employees. It has also taken a toll on our customers and, as a result, on our business. We have learned a lot about ourselves individually, and as a company. After a short pause and a breath, Gary continued. “Over the next month, we need to decide how we operate our business long term. Do we continue with the remote work permanently, and if so, how do we change our leadership approach to support this?”

At this point, Nancy turned to the development manager and said, “Jeff, as the leader of the development organization, can you work with your team to provide a recommendation? Given our looming lease renewal timeline, we need a decision by the end of the month.”

Without hesitation, Jeff smiled, nodded, and said “absolutely.” He then got to work.

Company Background

Xcira was a Software and Services company providing technology for auction houses around the world. The company was founded in 1998 by Nancy Rabenold. As the founder, she saw an opportunity in the live auction market to embrace the internet, enabling remote bidders to participate in auctions.

At the time this was a bold idea. Their platform revolutionized several auction industries such as automotive, heavy industrial equipment, bloodstock, and livestock.

Nancy and Gary – CEO and COO

Nancy and Gary Rabenold started Xcira with many years of experience from IBM and Nancy’s background in the auction industry. Nancy grew up with auctions. Her father’s construction business gave her the opportunity to see how the auction business was run and provided her with many insights into the industry. Nancy and Gary’s background, inventiveness, and customer-focused viewpoint made them the perfect team to launch this business and modernize the industry.

Nancy and Gary have always believed in transparency and followed the beat of their own drum. Early on in their journey, they decided how they wanted the business to operate and defined corporate values to match their belief system. This system provided the moral compass to lead their day-to-day journey. Nancy and Gary fundamentally understood that as times change, they must adapt.

Jeff – Vice President of Technology

Nancy and Gary hired Jeff Whiteside as the Vice President of Technology in 2015 to lead their development organization. Jeff started his career as a software engineer. Over the years he has transitioned into leadership roles focused on transforming organizations with traditional software development lifecycles to organizations that were agile, and value driven.

Short Background on the COVID-19 Lockdown

At the start of January 2019, the world began receiving reports of a new severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2). By January 2020, the first cases of COVID-19 were reported in the United States and by early February a Public Health Emergency was declared. By March, the World Health Organization identified COVID-19 as a global pandemic and the United States issued a National Emergency (Listings of WHO's response to covid-19, 2020). States and counties began to issue lockdown and quarantine orders for their businesses, events, and citizens.

Xcira's Journey with Remote Work

Once the COVID-19 pandemic hit, Xcira mandated that all employees work from home. This new work-from-home culture was embraced by many within the organization. Many liked the freedom it provided to structure their day to fit their unique needs. Others loved the time saved from not having to commute to work. This decision also created several surprising and important challenges. Many of these challenges centered around human psychology and its relationship to work. To be successful long-term, understanding these challenges, defining management and leadership models to mitigate them, and building a new leadership culture in the organization was critical.

There were several questions Xcira needed answers to. First, how would their business adapt to the expectations of a fully remote workforce? In the past, many organizations, including Xcira, have experimented with, and allowed workers to telecommute periodically. Forcing the entire workforce to "go remote," in one breath, was a difficult challenge, and one that could have hidden and dangerous side effects if not attended to?

Second, how did these challenges impact leadership? How did fully remote organization ensure their employees were properly motivated, engaged, and productive so they maintain high performance, job satisfaction, and achieve the expected results? How did communications have to change to ensure adequate alignment, understanding, and direction?

Along with evaluating their leadership approach, Nancy tasked Jeff to recommend how to address their upcoming lease. As Jeff evaluated the situation, he saw three options:

1. Request their employees come back to the office while following CDC guidelines. This would lead them to pre-COVID-19 business operations once safe to do so.
2. Permanently close the office and have all employees work remotely. Given the experiment over the last eight months, they believe this could be successful, but would have required changes in the leadership, organization, and processes. It would also save them significant monthly expenses.

3. Implement a hybrid approach that supported full remote work capabilities but allows for teams to gather when necessary. This would allow Xcira to downsize the office space and provide more suitable work accommodations for many employees.

Addressing Remote Work Leadership Challenges

Although leading teams is never easy, leading an all-remote team had its own unique challenges. These challenges ranged from communications to fighting procrastination, to work-home integration, to isolation and loneliness. Xcira faced several of these challenges and Jeff needed to build strategies to address them.

Work-life Integration Challenges

Sam, one of Xcira's QA engineers, had a difficult time balancing work responsibility with family duties because his son was also at home for e-learning. Much of Sam's workday was consumed by activities that take considerable focus and energy. Many tasks relied on collaboration with teammates and communication with managers as well as focused documentation and writing. He struggled each day to ensure his work responsibilities did not prevent him from being a good dad. He also struggled each day to ensure his home responsibilities did not interfere with his work performance. When Sam first started working from home, he was excited and optimistic. Now, he ended most days overwhelmed and exhausted working after he put his son to bed to catch up from what was missed throughout the day.

Jeff heard many stories like this during his weekly one-on-ones. He asked questions and looked for ideas and opportunities to solve these problems. On one occasion, Sam suggested he had difficulty focusing during the 9:00 am team meeting because he was also working with his son. Jeff felt strongly that the team should meet first thing in the morning to get a good start to the day, but clearly this was challenging Sam. Jeff decided to move the meeting to a time that better met the entire team's schedule and patterns.

Additionally, this provided Jeff an opportunity to support Sam by suggesting more job autonomy, giving him the encouragement to structure his job and schedule in a way to make it most effective for his situation, such as starting later and taking breaks when it was most helpful to his family. Also, Jeff shared that he personally set boundaries so that he started and stopped his workday at specific times so the work did not bleed into his family time. He suggested that Sam try this as well.

Isolation Related Challenges

During a weekly one-on-one with Max, a senior software engineer, Jeff noticed that Max was not as cheerful and optimistic. He took a note to continue observing this. After several more weekly discussions, Max's demeanor had not improved. Max lived alone, which had never been an issue for him as he was a proud introvert. It had surprised Max, however, that in this new world of working remotely, he

would feel a sense of isolation. This sense of isolation began to affect his attitude, his emotions, and even his job performance.

Jeff was concerned about Max's performance, but more importantly, Jeff was concerned about his wellbeing. With this heightened awareness, Jeff noticed others were similarly affected. Jeff realized that anyone could be facing these challenges and may need help to overcome them. This isolation and loneliness related to working remotely was a significant issue that the organization needed to address before it had more serious consequences. Given the mandated remote work, it was even more important to be aware and sensitive to everyone's situation, mood, and behavior changes. Listening, observing, and asking questions were crucial.

With Jeff's staff remote, he needed to heighten his awareness, be empathic, and be flexible. Going from an environment where people interact in person on a day-to-day basis, to an environment where you only interact through technology, when necessary, was an issue that needed to be addressed head on. First, Jeff wanted to improve his personal interactions with his team. He ensured that he met with each team member regularly in one-on-one meetings. Along with work discussions, Jeff made a point to make personal connections with each person.

Challenges with Social Support, Positive Psychology, and Collective Identity

Given the limited social interactions the team was able to have, Jeff became concerned that people were beginning to feel disconnected and out of touch with the organization. He saw signs of reduced motivation and engagement. There were even signs of cynicism and reduced attitudes that Jeff worried would become serious problems if not addressed.

Another challenge Xcira's management team faced was how to regain the "Xcira identity" that was eroding due to reduced community. They wanted to encourage and foster team bonding and positive social engagement. Jeff wanted to increase opportunities for social support, positive psychology, and a collective identity throughout the organization.

Authentic Leadership Overview

Jeff wanted to turn to Authentic Leadership to mitigate these problems. Authentic leaders are those that strive to be true to themselves, their ideals, and their morals as they lead and develop others. Its foundation is in positive psychology and moral reasoning and is characterized by purpose, values, and Integrity (George, 2004). Authenticity is "owning one's personal experiences (thoughts, emotions, or beliefs, "the real me inside") and acting in accordance with true self (behaving and expressing what you really think and believe)" (Cameron et al., 2003, p. 242). Authentic Leadership shares many characteristics with other positive psychology-based leadership theories but has several distinguishing characteristics. This theoretical perspective was developed through social science research and defines four key, related components including (Walumbwa et al., 2008):

Self-awareness and Self-regulation - Self-awareness is the process where people actively attempt to understand themselves, their strengths, their weaknesses, and their motives (Northouse, 2016). Self-awareness is closely related to self-regulation in that the growth a leader gains by better understanding themselves can be applied through more measured thinking and actions (Cameron et al., 2003). Self-awareness and self-regulation together enable the leader to respond intentionally to situations instead of just reacting to them.

Internalized Moral Perspective – An Internalized Moral Perspective is the self-regulatory process where people use their internal moral standards and values to guide their actions rather than be influenced by outside sources (Cameron et al., 2003). The actions and decisions of leaders with an internal moral perspective remain consistent with their core moral standards and values (Walumbwa, 2008). Leaders exhibiting an internalized moral perspective will base their responses to situations on their values and morals instead of being unduly affected by outside influences.

Balanced Processing – Leaders exhibiting balanced processing analyze information from multiple sources objectively before making decisions (Walumbwa et al., 2008). These leaders actively seek viewpoints challenging their positions, helping them craft more balanced and complete decisions (Walumbwa et al., 2008). Leaders exhibiting balanced processing also actively avoid favoritism and seek to minimize biases in gathering data for decisions (Northouse, 2016).

Relational Transparency – Relational Transparency relies on the leader presenting their true, honest self to others in an appropriate manner (Northouse, 2016). Authentic leaders remain open and honest in sharing their feelings, motives, and opinions (Kernis, 2003). This enables the leader to build real relationships based on trust and respect.

This characterization of authentic leadership focuses on a developmental perspective emphasizing continuous development and growth of authentic leadership skills, suggesting leaders can grow and improve their skills over time (Northouse, 2016).

Xcira's Next Steps

Xcira's management team experienced many challenges with remote work causing them to change their business and how they interacted with their employees. They experienced challenges ranging from work-life balance, communication, employee procrastination, and employee mental health, among other things. As Xcira moved forward with the decision, Jeff felt he needed to be open and honest with his teams and shared his own experience and challenges. He told stories relating his own difficulty balancing work and home life. He also shared how isolation had affected him and how he personally copped.

Xcira needed to decide if they would bring everyone back to the office, if they would close the office and continue to work remote, or if they would continue with a hybrid approach. This decision needed to be made quickly. They knew that the final decision would have lasting effects on the business, their employees, and their customers.

To quote Nancy, “If nothing else, this pandemic has taught me that reflection is a personal mandate. While watching the news, I can’t help but wonder what it must feel like to endure sitting in mile-long food lines, reading an eviction notice, losing a loved one in the hospital who died alone...Hopefully, it inspires us to reach out and do something for someone...I still believe in the biblical reference, “To whom much is given, much is expected.”

Discussion Questions

1. Identify examples of Authentic Leadership characteristics the Xcira management team embody?
2. How does Xcira’s leadership team apply Authentic Leadership characteristics to address the remote work challenges?
3. Which of the three work accommodation decisions should the Xcira management team make? Provide justification for your decision.

Teaching Notes

Synopsis

In 2020 the COVID-19 pandemic dramatically shifted how most businesses operated. Businesses were forced to mandate their employees work remotely. A remote workforce introduces different challenges for employees and their leadership. Leading remote organizations, the same way they led an on-premises workforce can produce undesired results (Kelley and Kelloway, 2012). Research has suggested that remote work has a positive effect for employers and workers alike; for employers, remote workers will work harder, put in longer hours, and be more devoted to the organization (Felstead & Henseke, 2017). Remote workers are rewarded through more flexible work arrangements leading to higher enthusiasm and job satisfaction (Felstead & Henseke, 2017). Unfortunately, the evidence for this is mostly incomplete (Felstead & Henseke, 2017). Historical remote work research was limited, mostly antidotal, and mixed at best. COVID-19 introduced an interesting case study because it forced businesses to go remote, which provided an opportunity for new research (Wang et al., 2020).

In challenging times, like the COVID-19 pandemic, true and clear leadership are even more important (Avolio and Gardner, 2005). A remote workforce requires a different form of engagement between leadership and their followers. For example, serendipitous, “water cooler” interactions no longer naturally occur. Since many management interactions occur this way, new approaches for communication and knowledge gathering must be developed. There are many established leadership

models useful for providing a framework and guidance for remote work. This case recommends that the Authentic Leadership Development (ALD) model can be a valuable framework when leading and managing remote teams. It explores several challenges organizations face when adopting remote workers and provides practical research-based recommendations for leaders.

The case follows Xcira, a Tampa, Florida, Software and Services company as they transition to remote workers. The case illustrates several challenges Xcira's management faced and asks how an ALD approach could be used to successfully mitigate the challenges. Most importantly this case provides opportunities to discuss how leadership must change to support the inevitable outcome of COVID-19. This idea is not merely theoretical as many technology organizations such as Facebook and LinkedIn have already indicated remote work will continue indefinitely and have even begun to hire c-suite remote work executives (Castaldo, 2020).

Case Objectives and Use

This case highlights several challenges heightened by a remote workforce and provides opportunities for applying authentic leadership theory to those challenges. It also encourages discussions on how different situations lend themselves to different leadership approaches. The case can be taught in introductory undergraduate leadership courses.

Learning Objectives

After examining this case and engaging in classroom discussions, students will gain the following skills and experiences.

1. Describe the characteristics of Authentic Leadership theory.
2. Recognize challenges of managing a remote workforce.
3. Compare and contrast how managing remote workers is different from managing non-remote workers.
4. Apply Authentic Leadership to address the three remote work challenges presented in the case.

Discussion Questions

1. Identify examples of Authentic Leadership characteristics the Xcira management team embody? (LO1)
2. How does Xcira's leadership team apply Authentic Leadership characteristics to address the remote work challenges? (LO1, LO2)
3. Which of the three work accommodation decisions should the Xcira management team make? Provide justification for your decision. (LO3, LO4)

Linkage to Concepts and Theories

The case illustrates two main concepts in leadership theory and research: (1) Authentic Leadership Development Theory (Avolio and Gardner, 2005), and (2)

Work Design (Parker, 2014). The case study highlights the importance of context in leadership and applies Authentic Leadership as a means for improving efficacy for remote work, leveraging the learnings within the Remote Work Framework (Wang et al., 2020).

Authentic Leadership

Employees are craving positive, transparent, and honest leadership to inject trust, empathy, and integrity into their work lives (Northouse, 2016). Authentic Leadership Theory can fill this need. As authentic leadership is still being researched and understood three perspectives that have taken hold: (1) Intrapersonal Perspective, (2) Interpersonal Perspective, and (3) Developmental Perspective (Northouse, 2016).

For this case, the Developmental Perspective will be applied. This perspective characterizes Authentic Leadership as something that can be learned and not just a fixed trait that a leader possesses (Northouse, 2016). This perspective describes Authentic Leadership as a pattern of leader behavior developing from a leader's positive psychology and core ethics, including Positive Psychological Capacity, Moral Reasoning, and Critical Life Events (Newhouse, 2016). This theoretical perspective was developed through social science research and defines four key, related components: self-awareness, internalized moral perspective, balanced processing, and relational transparency. (Walumbwa, 2008).

Remote Leadership – Work Design Approach

Historically, the ability for employees to work remote was periodic and based on individual's status and situation (Wang et al., 2020). Recently, due to the COVID-19 pandemic, remote work on a global scale was widespread and forced. As this trend may persist, it is crucial that leaders adapt to the new needs of their organizations and their employees. The challenges leaders face under this new reality are starkly different than the challenges they faced in the past. Leadership has been shown to be vital for remote team performance and success (Hambley et al., 2007).

This case study suggests describing the challenges of remote work through the Remote Work Framework, which outlines remote work characteristics, remote work challenges, individual factors, and expected outcomes (Wang et al., 2020). This framework is useful in evaluating how leaders can better serve their employees and organizations in a remote work setting. The research helps recognize the challenges that remote workers face and provides valuable insight into how to interact with remote workers and design their jobs to best serve them. For example, some individuals who are not *self-disciplined* will struggle with remote work, therefore jobs may need to be tailored specifically for the individual.

Research Methodology

The methods of data collection were both primary and secondary. Primary data were collected through face to face and remote interviews with the primary subject. Secondary data were obtained through research journals and articles. The primary case study development was produced through the primary author's firsthand discussions, interactions, and experience with Xcira. The examples and situations have been real-life examples.

Discussion Questions Answered

1. Identify examples of Authentic Leadership characteristics the Xcira management team embody? (LO1)

Strong answers will show examples of the four defined characteristics of authentic leadership:

Self-Awareness

The Xcira Core Value of "Never be content with less than your best" represented a strong narrative to understand your capabilities and work to deliver on them.

Gary's statement that "Development and change are a process, and we will continue to learn and grow" demonstrates an understanding that self-awareness and growth is not a finite state, but a process that can change over time. Jeff demonstrated self-awareness by reflecting on his strengths and weaknesses as well as on the remote work experiences of his teams. He reflected on the dangers remote work brought to the business and articulated the challenges that needed to be addressed.

Internalized Moral Perspective

In building their business, Nancy and Gary created, communicated, and lived by authentic leadership values. For example, *Value #2 – Do the right thing – profits should never trump virtues*, demonstrates a high level of Internalized Moral Perspective.

When Max's performance began to suffer, Jeff demonstrated a strong internalized moral perspective as he looked at Max's degradation in performance through an environmental context lens and saw ways to help instead of just critiquing the performance issues.

Balanced Processing

Jeff also exhibited balanced processing by listening to Sam's concern about his ability to focus during the 9:00am daily meetings. He listened and was able to make a decision that benefited the organization in the situation, even when it was contrary to his own policies.

Relational Transparency

Gary recognized and was transparent regarding the ongoing challenges the organization faced and that leadership must adapt and grow with the challenges. This highlighted an awareness and empathy for the challenges their employees faced.

Jeff shared his own experiences dealing with the challenges working remotely and how he coped.

2. How does Xcira's leadership team apply Authentic Leadership characteristics to address the remote work challenges? (LO1, LO2)

Strong answers will demonstrate how Xcira's leadership team applied authentic leadership characteristics to the three remote work challenges and describe how each challenge is addressed by the authentic leadership characteristic.

Work-life Integration

As Sam demonstrated, working from home caused challenges relating to how he would organize his work schedule with his family schedule. Jeff recognized that this was an issue, suggested to Sam that he had authority and autonomy to structure his job to best meet his situation, even as it is different than Jeff's own approach. This is an example of Balanced Processing. For example, Jeff suggested that Sam could take some time in the morning to work with his son and take breaks at helpful times during the day.

Jeff also showed Relational Transparency by sharing that he structures his workday by limiting when he starts and when he ends his day ensuring that work does not bleed into his family life.

Isolation Related Challenges

One of Xcira's core values is to "Work Together." This has become more difficult given the nature of remote work. The self-awareness that these challenges exist, and that it is leadership's job to address them, enables Xcira management to introduce policies, provide the necessary support to their employees, and be sensitive to their situation. Xcira management's internalized moral perspective also enables them to be more sensitive to their employees' circumstances and provided more personal interactions to reduce isolation.

Challenges with Social Support, Positive Psychology, and Collective Identity

Jeff recognized that, as a remote organization, more effort and focus needed to be applied to providing enhanced social support, a positive outlook, and foster an organizational identity. This awareness was supported by an internalized moral perspective and relational transparency. This provided Jeff and the Xcira management team an opportunity to encourage positive interactions. They can improve positive psychology through leveraging relational transparency in communications by highlighting stories of hope, optimism, and resiliency.

They can build a strong collective identity by providing opportunities for employees to share common experiences leveraging online forums and other communications. Xcira management should increase their individual and group interactions and remain aware of potential issues, changes, or concerns. They should provide open and honest feedback as well as support as needed.

3. Which of the three work accommodation decisions should the Xcira management team make? Provide justification for your decision. (LO3, LO4)

Xcira should take option three – a hybrid approach combining both remote capabilities and face-to face opportunities. This provides them with the benefits of flexibility and best accommodation. It will also provide them with reduced expenses due to a smaller facility. Implementing a hybrid approach that supports remote work capabilities and allows for teams to gather as necessary provides the best balance for the team.

Option 1, having employees come back to the office full time, may seem reasonable and could be viable. However, Xcira has shown that they can operate effectively, remotely, and for many the flexibility that remote work provided them, was a tremendous advantage to a small software company. Also, being remote during the pandemic, afforded Xcira to hire several strong employees that were further away from the office. Forcing everyone back into the office would put an unexpected burden on them.

Option 2, Permanently close the office and have all employees work remote, significantly limits future options. Without a physical office, employees who need a space would have limited options. This choice would also make it difficult to provide facilities for teams to do collaborative activities such as planning and design activities if they wanted that flexibility.

Teaching Suggestions

This case study assumes knowledge about authentic leadership and some elementary knowledge on remote work. Once Authentic Leadership is understood and the unique challenges of remote workers have been explored, it is important to tie them together by facilitating a discussion on how authentic leadership can support and improve remote worker leadership through this case study.

After a detailed reading, examination, and completion of the discussion questions, students should be encouraged to discuss as a class or in small groups. These discussions should be influenced by the students' experiences and background as well as their knowledge of the subject matter.

Epilogue

Xcira's management recognized the strengths gained from allowing employees to work remotely. They also appreciated the unique challenges the decision posed.

Xcira's leadership team decided to take a hybrid approach by allowing employees to continue to work from home most of the time. They also designated specific days employees were required to be in the office. These days corresponded to project events and other sessions that they felt were more effective through face-to-face interactions. Leadership

also decided to downsize their office to a smaller space saving them significant money. This decision gave Xcira the ability to design their office for better collaboration and allowed employees who were more comfortable coming into the office with a space to do that.

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