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# Performance management practices in remote and hybrid work environments: An exploratory study

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**Orientation:** The coronavirus disease 2019 (COVID-19) pandemic and the resulting lockdowns have significantly impacted the work environment, increasing remote and hybrid work practices. This shift has posed challenges for managers and employees as they adapt to new working methods, impacting employee performance management in hybrid settings.

**Research purpose:** The study explored how managers have adapted their performance management methods in remote and hybrid work environments. It also sought to understand remote employees' experiences with performance management practices.

**Motivation for the study:** There is limited research on evaluating employee performance in hybrid work environments. This research identified this gap and explored how managers can best support employees' performance while working remotely.

**Research approach/design and method:** The study used an interpretivist and qualitative approaches. A purposive sampling technique selected 18 participants, and data were collected through semi-structured interviews following a phenomenology research strategy.

**Main findings:** Key themes included continuous performance communication, team deliverable meetings, the importance of face-to-face engagements, clarity on performance expectations, trust, and well-being. Managers and employees used one-on-one and team sessions to track deliverables, discuss work challenges, and communicate performance expectations. Clearly defined performance expectations are crucial in hybrid and remote settings.

**Practical/managerial implications:** The study highlighted the effects of hybrid work on interpersonal relationships and emphasised the need for managers to adapt performance management practices to ensure consistent standards for all employees, regardless of location.

**Contribution/value-add:** The findings can inform the development of performance management guidelines tailored to remote and hybrid work, helping managers enhance their effectiveness and create positive employee experiences.

**Keywords:** adaption strategies; COVID-19; hybrid work; performance management; remote work.

## Introduction

When the coronavirus disease 2019 (COVID-19) pandemic struck the world in 2020, severe job changes for employees and managers and working from home (WFH) became compulsory as it was a drastic measure to curb the spreading of the virus (British Broadcasting Corporation 2020; World Health Organisation, 2020). The uncertainty produced by the pandemic caused unprecedented business changes across every industry and sector. The pandemic disrupted labour markets, occupations and work across the globe (Caligiuri et al., 2020; Hancock et al., 2021; Kniffin et al., 2021). During the COVID-19 pandemic, performance management practices underwent shifts. Some managers adopted more regular informal engagements with subordinates, while others were inclined towards a micromanagement style (Oakman et al., 2022). In addition, performance management during and after the COVID-19 pandemic has shifted towards thorough goal setting and measurement, with a focus on goal achievement taking precedence over monitoring work hours (Newman & Ford, 2021). However, after the

outbreak, organisations worldwide adopted the hybrid working model as a viable option to ensure business continuity (McKinsey & Company, 2021). Most organisations adopted technology as a viable option, where they quickly grasped digital practices and processes. Verma et al. (2023) stated that potential acceleration in automation and artificial intelligence (AI) adoption provided effective responses to workplace challenges. The extensive use of virtual collaboration and transition led to the acceptance of the new ways of WFH, impacting the future of work in deep, disruptive and permanent ways (Aroles et al., 2021; Diab-Bahman & Al-Enzi, 2020; Harney & Collings, 2021; Huang et al., 2021; Kniffin et al., 2021). Prior to the pandemic, digitisation already took place as digitisation permitted practices such as remote work and telework, that is, WFH (Chen et al., 2023; Hackney et al., 2022; Jones, 2022; Lakshmi et al., 2017). Unfortunately, prior to the pandemic, these practices were relatively new to most organisations (Vargas, 2020). Several studies have shown that WFH during the pandemic brought advantages and disadvantages for employees (Carnevale & Hatak, 2020; Graves & Karabayeva, 2020; Ipsen et al., 2021). In addition, WFH can enhance performance and productivity (Apollo, 2022; Weber et al., 2022). It has also been reported that an increasing portion of the workforce will continue to work after the pandemic (Gartner, 2020; Lister, 2020). Research findings show that most remote employees perceive remote work as positively impacting their productivity (George et al., 2021). Remote work has many benefits, which include reducing travel time and costs, flexible work hours, increased productivity and lower attrition rates (Lowy, 2020). A few adverse aspects of WFH included isolation, communication difficulties with colleagues, blurred work–life boundaries, self-discipline and dependency on private resources. Remote work has also been an adjustment for managers and their subordinates, presenting various challenges and more noticeable issues include loneliness and burnout (Lowy, 2020). Some less visible problems remote working could create are 'low bandwidth communication', excessive and pointless virtual meetings and loss of passive knowledge sharing (Lowy, 2020). Passive knowledge sharing has gone because of minimal informal 'water cooler' conversations, enabling relationship building and sharing ideas (Haave & Vold, 2021).

The banking sector was not immune to these disruptions and uncertainty. The pandemic shifted millions of employees worldwide into remote work, also called WFH. This shift was only temporary for some organisations, while for others, lifting lockdown regulations permitted a return to formal workplace settings (George et al., 2021). However, it was an abrupt change, with no preparation or gradual shift into remote work. Many organisations have since adopted hybrid work practices where some employees are back in the office, others work partially at home and others permanently from home and only come into office workspaces occasionally for meetings or collaboration events (Mortensen & Haas, 2021). Hybrid and remote work

practices are most prevalent for knowledge workers, as it is easier for them to work remotely, given technological advancements. As future work is likely to be more hybrid, understanding how such a workplace model impacts employees' work-related outcomes is more important during this transition to a new era of working. Evaluating employees' performance has interested scholars for years. However, COVID-19 has repositioned employee performance as hybrid work has become more popular. Previous research looked at remote or hybrid work regarding well-being and balancing work and home commitments, especially during the pandemic lockdown period when schools were closed because of lockdown restrictions (Al-Habaibeh et al., 2021; De Klerk et al., 2021; Hernández et al., 2021). Extensive studies have also been conducted on information technology (IT) employees. As organisations continue to discuss how to extend WFH post-pandemic, as illustrated by Gartner (2020), The Economist (2020), The European Commission's Science and Knowledge Center (2020) and Predotova and Vargas (2021), it is essential to understand how managers experience the change in their role in evaluating performance in the hybrid environment and the transition phase of WFH. Workplace seclusion, poor communication, family interruptions, overwork and work-related stress have significantly impacted employee performance (Hamouche, 2021). As a result, management practices have had to adapt to the new normal of remote and hybrid work practices while ensuring effective performance management practices. Performance management is crucial as individual performance impacts organisational performance (Ashdown, 2018). Despite environmental constraints, organisations must maintain and strengthen their performance management processes and practices (Aguinis & Burgi-Tian, 2021).

Owing to the inherent nature of their professions, knowledge workers in South Africa had greater exposure to remote work even before the implementation of COVID-19 lockdown measures. However, a noticeable dearth of research delves into remote work within the South African context, particularly concerning knowledge workers and the practices associated with managing their performance in remote and hybrid work settings. Trust is a key enabler when managing performance in remote and hybrid work settings (Lewis-Iley, 2021). Performance management in hybrid and remote work environments is based on managing outputs rather than direct supervision, which necessitates high degrees of trust (Agua, 2004; De Leede & Kraijenbrink, 2014; Depoo, 2022). Consistent and clear communication is critical for effective performance management in hybrid and remote work settings (Agua, 2004; Caetano, 2011; Lewis-Iley, 2021; Newman & Ford, 2021). Furthermore, remote and hybrid work practices could have an impact on collaboration within and across teams, and this could have a detrimental impact on individual and team performance (Yarberry & Sims, 2021). Consequently, it is imperative to investigate the impact of remote work on trust, communication and collaboration. Additionally, there is a noticeable research gap regarding the experiences of knowledge workers who have endured physical isolation from their colleagues,

resulting in missed opportunities for knowledge sharing and idea exchange.

## Research purpose and objectives

The purpose of this study was to explore managers' performance management methods since shifting to remote and hybrid work environments. Objectives of the study were to understand how performance management practices have evolved as remote work has become conventional, explore if and how managers have adapted their performance management practices as they manage remote employees and to explore how remote employees experienced performance management practices.

## Literature review

This section focuses on understanding the dynamics of managers' performance management practices and experiences of employees in hybrid environments. In addition, the literature review will discuss social learning theory, agency theory, performance management as well as the evolution of performance management from the post-COVID-19 pandemic.

### Social learning theory and remote working

Hybrid and remote work settings can result in professional isolation, impacting knowledge sharing and productivity (De Leede & Kraijenbrink, 2014). As the social learning theory suggests, people gain new knowledge by observing and engaging with others (Yarberry & Sims, 2021). Learning new skills happens by observing role models, paying attention to how others conduct themselves, learning through others, imitating observed behaviour and having support to continue applying newly learned behaviour. Yarberry and Sims (2021) assert that being present in the physical work environment and the relational aspects of being in a physical work environment can positively influence employees' development through social learning. Social learning directly impacts career development and progress. However, this is limited in remote work settings because employees have fewer opportunities to observe role models and pay attention to the conduct of others in the workplace. Social learning usually happens only through formal and informal virtual engagements or in hybrid work settings when employees have face-to-face engagements. A study by Yarberry and Sims (2021) has shown that a lack of physical connection between team members and managers adversely impacted performance, as most employees collaborated with colleagues and managers to support their ideas (Yarberry & Sims, 2021).

### Agency theory and remote working

Agency theory considers what motivates people and associates the principal and agent interests using agency controls such as incentives (usually financial) or monitoring (Fong & Tosi, 2007). Young et al. (2012) described the principal as someone who assigns work to a second party, the agent. In return, the agent receives some form of compensation. The assumption is that the agent has self-interests and priorities that do not align with the principal and will try to expand their interests. Agency theory suggests that employees have more agency in their work, which can affect their performance (Fong & Tosi, 2007). The study employs agency theory to gain insight into the role of trust in effectively managing performance in remote and hybrid settings. The premise of agency theory is that the agent's default behaviour is to evade responsibility when agency controls do not exist (Fong & Tosi, 2007). In a conventional office setting, managers can directly observe employees' work habits and productivity. The assumption is that the agent is also risk-averse concerning compensation. Thus, the agent will work in ways that expand their self-interest at the expense of the principal's advantage (Young et al., 2012). The main concern for the principal is 'how to structure the relationship in such a way that the agent performs the work as desired' (Young et al., 2012, p. 966). Remote work reduces direct oversight, leading to greater information irregularity. Principals (employers) might find it harder to monitor agents' (employees') performance, potentially increasing agency costs. To solve this issue, the principal can closely monitor the agent's work or align part or all of the agent's compensation to attain desired performance goals (Young et al., 2012). The assumption is that agents will perform better when monitoring is present because monitoring will reduce shirking. Conversely, agents act opportunistically when monitoring is not present, thus decreasing performance (Young et al., 2012). In addition, agency theory suggests that principals need to trust agents to act in the organisation's best interests. Remote work necessitates higher trust levels because of reduced direct control. With WFH or hybrid models, employees often have more autonomy. Effective performance relies on intrinsic motivation and alignment with organisational goals, rather than just extrinsic supervision. Agency theory serves as an analytical lens to examine how remote working conditions alter the principal–agent relationship. The theory provides a framework for developing strategies to address issues such as monitoring, motivation and information asymmetry in remote work settings.

### Performance management

Performance management is vital for all organisations because when it works well, it can help ensure that employees are adding value by focusing on the right things (goals) and that they are efficient by working in the best way possible. Furthermore, performance appraisal, an aspect of performance management, plays a significant role in determining employees' bonuses, salaries and career advancements. Thus, performance management practices in hybrid and remote environments must be reviewed so that employees are not adversely affected by inept practices (Agua, 2004).

Performance management is about defining, quantifying and encouraging employee performance to improve organisational performance (Den Hartog et al., 2004). Ashdown (2018) noticed the importance of aligning the individual's performance with the organisational goals.

Another critical aspect is understanding performance as an output, what people do, how they do it and their behaviours (Ashdown, 2018). Performance goals thus include outcomes (results) and behaviours. Outcomes refer to what the employee has done or what the employee has produced or delivered. Behaviours in this context refer to how these outcomes were achieved, and the process followed to obtain the results (Aguinis et al., 2011).

## The evolution of performance management from the post-COVID-19 pandemic

The COVID-19 pandemic radically transformed working practices when organisations required workers to work from home. Organisations had to revise human resource management practices such as hiring, training and performance management to accommodate remote work conditions (Hamouche, 2021). During the initial days of the pandemic, organisations were operating in crisis mode, and the question arose whether there was even a need for performance management in times of such uncertainty and unfamiliarity (Aguinis & Burgi-Tian, 2021). Many organisations have shifted to remote work and hybrid work arrangements, and there is a strong consensus that performance management is necessary now more than ever (Aguinis & Burgi-Tian, 2021). Aguinis and Burgi-Tian (2021) asserted that performance management plays a role in communicating the organisation's strategic direction, enabling sound and meaningful feedback and facilitating valuable business data collection.

There is a general view that performance management's objective should shift to outcomes based, as managers need to manage outputs or results rather than inputs. This approach is challenging for managers as they need to change from overseeing the work of their direct reports to tracking results. This means they should discuss, agree and measure results (De Leede & Kraijenbrink, 2014). This also means that performance metrics need to shift from measuring inputs to measuring outputs (Göndöcs & Dörfler, 2021; Kaufman & Taniguchi, 2021; Kniffin et al., 2021; Van der Lippe & Lippényi, 2020). Cascio (2000) refers to this as a shift from managing time to managing projects.

These shifts in performance management practices started before the COVID-19 pandemic and the subsequent remote work adoption. The first change was the shift to becoming more data driven when measuring performance. Organisations use data to inform performance metrics (Göndöcs & Dörfler, 2021). With the world of work constantly changing, performance management needs to adapt and become more agile and unbiased, hence the reliance on data metrics (State News Service, 2021).

The second shift in performance management is the forward-looking and development-focused approach. This includes frequent manager and subordinate communication, check-ins and ongoing performance feedback and metrics (Göndöcs & Dörfler, 2021). Studies have also shown that

clear communication from managers regarding performance standards and expectations when remote work is initiated usually results in enhanced performance from employees working remotely. Studies have also shown that there has been more frequent formal and informal communication between managers and their subordinates than before the pandemic (PR Newswire, 2022).

## Managers adapting to performance management of remote employees

The shift to results-based performance management also supports the view that being present or office-based does not mean one is productive (Kaufman & Taniguchi, 2021). When managing remote teams, managers face difficulties assessing productivity and performance regarding results and not "face time" motivating their teams and keeping track of work progress (Van der Lippe & Lippényi, 2020).

In some situations, managers find it difficult to assess performance, and Nitika and Arora (2020) have advocated for a fresh approach to the performance evaluation of employees. Monitoring employee performance can decline in remote work settings if there is little engagement between managers and subordinates (Institute of Electrical and Electronics Engineers, n.d.) The shift to remote work has required managers to adapt their management practices, including performance management practices (Hamouche, 2021). Managers face everyday challenges, which include building trust remotely and balancing trust and control (Göndöcs & Dörfler, 2021). Managers' ability to trust and empower others is essential for optimal performance in remote work environments (Kirchner et al., 2021). A recent study has found that employees have either experienced 'an increased sense of distance between themselves and their managers' or have experienced being micro-managed by their managers (Chafi et al., 2022, p. 9).

Building trust relationships is fundamental in remote and hybrid work settings. Trust relationships are imperative when managing the performance of remote employees. Studies have identified that performance increases when employees feel trusted by their managers and team members (De Leede & Kraijenbrink, 2014). Managers can build trust by consistently engaging with employees (Lewis-Iley, 2021). The quality of the relationship between manager and subordinate predicts employees having positive reactions to the manager's performance appraisal. The likelihood of employees accepting and being satisfied with their appraisal is higher when they feel their manager has an accurate view of their performance, takes an interest and supports their work performance (Lewis-Iley, 2021).

## Performance management practices in hybrid and remote environments

Good listening skills are required by managers when managing the performance of employees in remote settings. Listening entails paying attention to what is being said

and being attentive to the unsaid (Poulsen & Ipsen, 2017). One of the significant challenges in remote and hybrid work environments is limited face-to-face engagements. Not being able to observe an employee's body language when giving feedback can dissuade managers from providing feedback. Managers should become more comfortable with virtual engagements and listen attentively to employees (Caetano, 2011). Video calls can also help build rapport, allow for visual connections and enable managers to observe reactions (Makela, 2018). Studies have shown that video calls can be as effective as face-to-face engagements (Lewis-Iley, 2021).

Performance management should not be seen as an annual or bi-annual event to review performance but should be based on regular conversations on deliverables and progress made towards goals (Aguinis et al., 2011). This recommendation is even more applicable in hybrid and remote work settings. Managers who manage remote employees must establish performance management practices that involve regular review discussions with the team and individual employees. Creating performance management routines includes meeting individually with direct reports and discussing their performance (Fisher & Fisher, 2011).

Poulsen and Ipsen (2017) found that remote employees appreciated managers' direct feedback about their performance. Direct feedback about performance is crucial as employees do not interact daily with their managers. Thus, managers need to provide clear feedback on the quality of their work (Poulsen & Ipsen, 2017). Continuous feedback also promotes transparency between the manager and the employee, which helps avoid surprises in the performance management process (Cascio, 2000). Furthermore, when managers provide direct feedback about work performance, employees are more at ease to raise difficulties that may emerge later (Poulsen & Ipsen, 2017). High-quality, frequent communication between managers and remote employees increases the possibility of ongoing feedback. There is a risk that distanced relationships can lead to reduced timeliness and quality feedback. This reduced feedback could result in scepticism and discontent with decision-making processes and communication. Distanced relationships also make it more challenging to provide instantaneous and impromptu feedback (Lewis-Iley, 2021).

# Research design
## Research approach

This study adopted an interpretivist qualitative research design because performance management in remote and hybrid work settings is new in South Africa and other countries. Interpretivism acknowledges that studying human beings differs from other phenomena as they create meaning in their world. They also want to understand individuals' lived experiences and include participants' interpretations of their research and the researcher's (Saunders, 2009). Interpretivist research aims to generate novel, deeper insights and explanations of social circles and settings (Saunders, 2009). This study draws on an interpretative technique because the researcher wants to understand participants' experiences and how they attach meaning to these experiences. An exploratory research design method is suitable for exploring the research questions. It may mean that further research could be performed to solve some identified issues. Exploratory research helps to generate new or exciting knowledge about a new or under-researched topic (Leavy, 2014).

## Research strategy

This study adopted a phenomenology research strategy as the researcher explored the lived experiences of managers and subordinates working in hybrid and remote settings. The researcher wanted to understand their experiences with performance management.

## Research method
### Research setting

This study explored the lived experiences of managers and subordinates as to how the performance management practices have evolved in a hybrid work environment in the South African banking sector working in a hybrid work setting, namely WFH but going into the office occasionally for meetings and other work engagements. This study was conducted at one of the five largest banks in South Africa in Gauteng. The banking sector employs over 154 000 people (The Banking Association of South Africa, 2022). According to the 2022 financial sector outlook study, South Africa has a significant financial sector with a gross domestic product (GDP) ratio exceeding most emerging markets. Most of these assets sit in the banking sector (Financial Sector Conduct Authority, n.d.).

### Entrée and establishing researcher roles

Before accessing the research setting, the researcher liaised with the gatekeepers (senior managers) to conduct research within the organisations. Researchers' role was congenially related to the participants as a custodian of their perspectives and experiences (Esterberg, 2002). The researchers invited accessible and available participants to participate in the study via email, providing a cover letter and an informed consent form. Consenting participants signed the consent form and then scheduled appointments for online semi-structured interviews. Participation was accomplished by acting ethically and expressing genuine interest in the research participants. In this respect, the researchers considered it a privilege to interact with individuals and act as custodians of their stories (Esterberg, 2002). The researchers are guided by ethical responsibility, which required reflection of personal biases, views, moods and emotions when interacting with participants.

## Research participants and sampling methods

The population for this study consisted of 18 participants, comprising of 8 managers and 10 employees, who were purposefully selected for interviews to explore their experiences as to how the performance management practices have evolved in their hybrid work environment. Pseudonyms were employed to safeguard participant identities and maintain confidentiality. Even though the researchers met the participants face to face, pseudonyms provided anonymity during the analysis phase. The researchers separated participants' identities and responses to ensure unbiased analysis. Table 1 indicates the composition of the research sample. This study used non-probability, purposive sampling. Merriam and Tisdell (2016) explained that:

[P]urposeful sampling is based on the assumption that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learnt. (p. 96)

Non-probability sampling shows that the researcher is not looking for generalisations because generalisations are not required in qualitative research (Merriam & Tisdell, 2016). The researcher is intentional about who is included in the sample to ensure that one sufficiently answers the research questions (Johnson et al., 2020). A sampling technique in qualitative research is defined as purposeful when research needs to be evaluated according to how well it serves the objectives of a specific study. A small, purposeful sample is sufficient for obtaining an in-depth view of participants' experiences (Merriam, 2009).

Table 1 shows that the sample consisted of managers with 5 years to 27 years of experience in their respective portfolios at the bank. Additionally, as part of the inclusion criteria, it includes employees who are subordinates in the various divisions within the bank, with 3 years to 12 years of experience.

**TABLE 1:** Composition of the research sample.

| No | Participant | Gender | Role | Tenure (years) |
|----|-------------|--------|------|----------------|
| 1 | P1 | Male | Manager | 18 |
| 2 | P2 | Male | Manager | 21 |
| 3 | P3 | Female | Manager | 27 |
| 4 | P4 | Male | Manager | 4 |
| 5 | P5 | Female | Manager | 9 |
| 6 | P6 | Female | Manager | 5 |
| 7 | P7 | Female | Employee | 5 |
| 8 | P8 | Female | Employee | 24 |
| 9 | P9 | Female | Employee | 3 |
| 10 | P10 | Male | Employee | 5 |
| 11 | P11 | Female | Employee | 12 |
| 12 | P12 | Female | Employee | 15 |
| 13 | P13 | Male | Employee | 9 |
| 14 | P14 | Female | Employee | 4 |
| 15 | P15 | Male | Manager | 18 |
| 16 | P16 | Male | Manager | 11 |
| 17 | P17 | Female | Employee | 8 |
| 18 | P18 | Female | Employee | 12 |

## Data collection methods

This study used semi-structured interviews as the data-gathering instrument. Open-ended and close-ended questions were used with the support of an interview guide. For this study, semi-structured interviews were conducted via Microsoft Teams, a synchronous virtual platform, and the interviews were conducted individually (one on one). The interviews were recorded and transcribed. The participants' identities were anonymised when transcribed.

## Data recording

Data recording included taking notes and recording the interviews. The recording and transcription features of Microsoft Teams were used to capture and document interviews. For accuracy, interviews were transcribed and corrected and then stored on a secure, password-protected computer.

## Strategies to ensure data quality and integrity

This study complied with integrity and data quality as the researcher ensured that member checks were conducted to ensure credibility. In addition, changes that might have occurred in the research were accounted for dependability while an audit trail of all decisions made in the research ensured confirmability. Cassell et al. (2018) assert that credibility is about making the chain of evidence that leads to your interpretation of the data as clear as possible. The researchers presented ample evidence of credibility, namely, participants' quotes. Providing data to support the study's findings allows readers to draw informed conclusions. The researchers analysed the potential impacts of their involvement in the research and provided an in-depth evaluation of how they interpreted the informants' data, using relevant quotes to support their conclusions. Merriam and Tisdell (2016, p. 249) assert that researchers 'need to explain their biases, dispositions, and assumptions regarding the research to be undertaken'. Dependability refers to whether the study's findings 'are consistent with the data collected' (Merriam & Tisdell, 2016, p. 251). For the study to be dependable, the researchers needed to describe the research method in detail so that the reader understood the research process and that the work could be repeated (Johnson et al., 2020). In this study, the researchers explained each stage of the research process to allow readers to understand how the research findings were concluded. Transferability is the ability to apply research findings to other contexts. This increases the study's usefulness (Cassell et al., 2018). In this study, the context of the research study, namely the setting, which is the South African banking sector, and the demographics of the potential participants, namely managers and subordinates who are WFH and sporadically in the office, are provided. Contextual description of the setting will thus allow readers to recognise whether this research will apply in similar settings. Confirmability indicates that the findings are based on the participants' data, not the researcher's interpretation or bias (Johnson et al., 2020). In this study,

semi-structured interviews to probe further when we needed to clarify what participants meant instead of ascribing possibly inaccurate meaning. Interviews were recorded using Microsoft Teams and transcribed. Conformity of this study is supported by thoroughness in data collection. The researcher had regular meetings with the study leader to ensure adherence to rules and procedures.

## Data analysis

As an interpretivist research philosophy applies to this study, employing an inductive research approach was fitting. An inductive process was undertaken by using data from interviews to identify themes and gain a deeper understanding of the realities of the people in the study (Merriam & Tisdell, 2016). Thematic analysis was used to analyse the qualitative data collected for this study. Thematic data analysis involves examining data to detect, evaluate and report recurring patterns (Kiger & Varpio, 2020). This method of data analysis is suitable and effective when one wants to 'understand experiences, thoughts or behaviours across a data set' (Kiger & Varpio, 2020, p. 3). Thematic data analysis is ideal for this study as it explores employees' lived experiences in the banking sector and finds common or shared meanings. Thematic analysis entails reviewing the data and organising them by using codes. Coding is where data are categorised into shorthand classifications by assigning words, numbers, colours, letters or combinations of categories to data (Merriam & Tisdell, 2016). The next step entails collating codes into potential themes, gathering all data relevant to each potential theme. The themes are then reviewed, defined and named, supported by extract examples from the interviews. The process aims to make sense of text data and is an inductive process used to identify patterns in the data and narrow down the data to a few major themes (Creswell, 2012).

## Ethical considerations

An application for full ethical clearance was made to the University of Johannesburg's Department of Industrial Psychology and People Management Ethics Committee and ethics consent was received on 01 October 2022. The ethics approval number is IPPM-2022-695 (M).

## Protection of participants

Firstly, informed consent was obtained from participants before conducting interviews. Informed consent means that the participants have made an informed choice to be part of the study. Secondly, participants were given sufficient information about the research and were not forced (directly or indirectly) to participate in the study. Thirdly, participants were advised about the study's objectives, that their participation was voluntary and that they could opt-out. Participants signed consent forms when they decided to be part of the study.

# Findings

Based on the responses from the research participants, the following six themes emerged in respect of how they experienced their performance evaluation in a hybrid environment: communication, performance expectations, trust and well-being. In addition, sub-themes also emerged, which includes continuous feedback, team meetings on work deliverables, trust and employee monitoring, micro management, work–life balance and hybrid benefits. Table 2 presents themes and sub-themes derived from the thematic data analysis.

## Theme 1: Continuous performance communication

This theme relates to communication by managers to the subordinates regarding continuous performance communication. In addition, this theme collectively underlines the significance of diverse communication methods, from individual discussions to team meetings and in-person engagements, in fostering effective collaboration and understanding within a team or organisation. A sound communication system needs to be in place in order to enhance performance among employees. One of the shifts in performance management practices as hybrid and remote work practices have become more common is increased communication and continuous feedback. One-on-one conversations have become increasingly prevalent in the hybrid work environment. Participants indicated that communication about performance must be ongoing and not only when doing performance reviews:

> '[…*H*]aving those open and honest conversations. So, once you pick up that this is slacking, rather tackle it then, instead of leaving it to reoccur and then try managing it once it has been consistently happening over and over and over.' (P6, Female, Manager)

Most managers indicated the importance of one-on-one sessions with their direct reports to track work deliverables and coach their staff. One manager mentioned that implementing one-on-one sessions commenced with the shift to hybrid work:

> 'No, I have catch-ups with each of my people. Every month we have one month, we have what we call a management team session, which is an hour with all my people, five of us and then each month, I have one-on-ones every month with each of them directly to discuss the standing agenda it is got to do with performance. Let's say we start at eight and we finish at about

**TABLE 2:** Themes and sub-themes identified through thematic data analysis of interview transcripts.

| Theme | Sub-theme |
|---|---|
| 1. Continuous performance communication | - |
| 2. Team deliverables meetings | - |
| 3. Relevance of face-to-face engagements | - |
| 4. Clarity on performance expectations | - |
| 5. Trust | Trust and employee monitoring |
| | Micro-management |
| 6. Well-being | Work–life balance |
| | Benefits of hybrid work |

five-thirty or six. So basically, all of them were there all the time, so we did not do one-on-one catchups that only started post-pandemic.' (P4, Male, Manager)

One participant (Participant 9, Female, Employee) had to initiate and set up regular one-on-one sessions with her line manager after receiving a bad performance rating. The manager did not establish regular one-on-one discussion practices, and the employee then took the initiative to align with performance expectations:

'I think the first half of the year, we didn't have one-on-ones, so it was always just group settings, or I reached out when needed to. By the time it was mid-year performance, we were not aligned. So, what then changed for the second part of the year is that I set weekly meetings. I had to set the weekly meetings to say I need us to engage regularly so that whatever discussions you are having above me. You can actually say, P9, are you still on the right track? No P9, let that one go. Prioritise this. So, I found that after we introduced the weekly meetings, we were better aligned going forward. That's when we are able to incorporate the GCC changes. What is priority? What is not priority? … So, it actually narrowed down and made my role a bit more strategic and also a bit more specialised.' (P9, Female, Employee)

## Theme 2: Team deliverables meetings

Team sessions to discuss work deliverables are another communication and feedback mechanism that aligns with performance management. Most manager participants indicated that they implemented regular team meetings to ensure their teams aligned with work deliverables and could discuss challenges. These team sessions included frequent check-in sessions, with some managers reporting on having weekly or daily check-ins to discuss the well-being of their teams, work priorities and challenges. Managers reported the following:

'… Every morning between 08:00 and 08:15, we have a buzz session. So, with the buzz session, it's a quick check-in on Mondays. It's a video buzz session, and then the rest of the days, it's just voice, which is do a check-in and then if there's anything urgent that I need to share with the team or the focus for the day, I share it with them. Then I also, in terms of productivity, if they are slacking or if they need to improve on anything or if maybe they experienced any challenges, hence it dropped, then we are able to have that discussion prior to the start of the day if maybe they had concerns towards the end of the day they are also noted down and bring it up in the morning, and then we have a discussion. Maybe someone else had the same or similar issue, and then we can then help each other as a team.' (P16, Male, Manager)

'[…W]ith regards to daily discussions, so we would go into our buzz session every morning and discuss the previous day's productivity.' (P5, Female, Manager)

'So, our check-in starts with, you know, not talking about work, and then obviously we go into discussions around how we're going to work as a team in terms of picking the numbers up or what are some of the strategies that we want to share in those team meetings.' (P2, Male, Manager)

Virtual communication is regarded as an effective means of communication, often considered comparable to face-to-face interactions:

'… It's the same as having a face-to-face conversation.' (P16, Male, Manager)

'…so, you know we use MS Teams quite effectively in terms of our check-ins.' (P4, Female, Manager)

'I think having that consistent communication with your staff, be it that it's virtual, I think that definitely helps because it feels like you're not just alone sitting at your desk behind a computer, and you do have that personal engagement that you have with the team.' (P2, Male, Manager)

## Theme 3: Relevance of face-to-face engagements

Despite the effectiveness of virtual communication, comparable to face-to-face communication, some participants indicated the importance of having face-to-face engagements. Some of the statements are as follows:

'…The only thing lacking is the face-to-face interaction. Sometimes you do have better conversations when you are sitting in front of a person.' (P7, Female, Employee)

'What I have done is for my performance conversations … is to have it face to face. So, if it's whether you're a go and have it face to face, at least give them that honour. For spending the day. Because those conversations happen twice a year.' (P1, Male, Manager)

## Theme 4: Clarity on performance expectations

Most managers expressed the significance of effectively communicating explicit performance expectations to their subordinates, particularly in implementing hybrid work arrangements:

'… If you have those regular conversations with the team, and they understand what is expected, and they acknowledge what they need to do, and you address it early on, I think that definitely helps when you're having a tough conversation because even as a line manager, it's not the easiest.' (P2, Male, Manager)

'We sort of create clear expectations and sort of improve communication around what they expected to deliver on and what are the company expectations in comparison with their targets and their stretches…. So, it's just ensuring that everyone understands their goal commitment contract cause I think that's the basis underpinning performance…So when we have our monthly one-on-ones, we do an overview of expectations, and I think a lot of people get it wrong because they have a GCC which they set at the beginning of the year and their one-on-ones don't talk back to the GCC.' (P4, Male, Manager)

## Theme 5: Trust

Trust is an important issue when teams are working in hybrid work environments. Managers said they trust their direct reports but are concerned when employees are not transparent about their whereabouts during the working day. The following statements from manager participants indicate this:

'In this environment where you working virtually from home, you have to trust, you know trust is earned. But at the same time, you have to allow people to also not feel, umm, that they have to, you know, be on screen every second of the minute of the day. So, to encourage them to take their lunch break, book it in, you know, if you need to put it in your calendar, you know, put it in there as a lunch break. If you need to pick your kids up from school, you know, put that in. It's having that transparency. Think we're the trust element does come in into play is when you can't reach somebody, so you have a meeting the persons not showing up. You phone them. They're not taking the call. You can see they haven't been online. You see, there's no online activity. That sometimes can, you know, create a bit of mistrust. You know, obviously then and have, you know, discussions, you know, on how what is expected when you're working from home.' (P2, Male, Manager)

'I've got a very experienced team, and they've been with me for a very long time. In fact, all my managers have been with me for more than ten years, so …. I trust him undoubted right? It's just that they do run errands, and I guess we all do that; for me the only thing is tell me if you're going to do it in case, I need you.' (P1, Male, Manager)

Employees reflect the sentiments expressed by their managers. When asked whether trust has ever been an issue between them and their managers, below are some employee statements:

'I think so. Even though they don't upright say it, that's when I saw that you have to actually bring to the table what you are doing because the ship is not sinking; it is as if you're not doing anything. So that, for me, highlighted a trust issue, so that's why I had to take stock of what I'm doing and actually bring it to say, okay, this week I was business 12345. Do you think I should just continue focusing on that, not focusing on that? Okay, here's the admin aspect of what I'm doing. And here is the illustration of long-term deliverables that I'm busy on, so constantly bringing it up to the attention that, for me said, there's a trust issue. That's why I had to be more open.' (P9, Female, Employee)

### Sub-theme 1: Micro-management

Another sub-theme that emerged during the interviews was micro-management. Based on the managers' responses, it can be inferred that they tended to refrain from engaging in excessive micromanagement. In contrast, employee participants seemed to indicate that micro-management does occur although it is more subtle and not overt micro-management.

Below are some of the statements from managers:

'So, I try and be hands-on, but not where I'm practically macro managing the person every step of the way…' (P3, Female, Manager)

'So, it's just getting the trust relationship that, you know, people are planning. They understand when load-shedding is coming on, so there's no excuse that they couldn't log on; they are charging their laptops. They've got a backup, or if they know there is prolonged load-shedding, they're going into the office. So, it's those type of things where we trust them to manage themselves and not be micromanaged.' (P4, Male, Manager)

'You know you are working from home, but it doesn't mean that you have to be in front of the computer and in the very beginning I had some staff that, you know, including myself, you know, you would just think you need to be on, showing that you're working.' (P2, Male, Manager)

'Then the other challenges are, you know, just the discipline of managing your time. It's something that's important for us to be successful in what we do and execute in terms of the output that we require. So those can be problematic. You have to always keep your finger on the pulse; otherwise, the people sort of derail.' (P4, Male, Manager)

One manager inferred that it would be challenging to trust that direct reports are working without technology to monitor employee productivity. Below is the participant's feedback when asked if the situation would be different if she did not have the technology to monitor productivity:

'Yes, I think it would have been a problem. …. we have chats with friends that work for other companies that don't use X System. And I always ask if people are working from home, how do you know that during the workday that they are supposed to do at the time allocated, you know what I mean?' (P1, Male, Manager)

In contrast, two employees stated the following when asked about trust and micro-management:

'How can I put it? I would say because last year June, he marked me as a non-performer. So that that to me said you don't understand what I'm doing. So, I had to then document, which created a lot of admin. There's an element of micromanaging. So, I think we look at micromanaging in an aspect that you must report everything you're doing, and the manager asks you. But if they're not asking you because people manage differently, but if they're not asking you and then later mark you as a non-performer, that's the macro element missing there. So, then I had to volunteer the information. So still, that creates admin, so it's for me it's the same. And that, for me, is an element of micromanaging in as much as I offered the information. But that is an element because I was pushed in a sense to offer the information.' (P9, Female, Employee)

'I'd never want to give someone the excuse that, uh, because I'm working from home, no one knows what I'm doing. So, I make sure and again, like I said, I'm talking for the greater team. We are all the same, but if not immediately, as soon as possible, we'll answer an email or, return a call or get things done. Umm, but that's self-imposed as well. It's not like the business is putting pressure on us or our line manager. I even have my Teams and Outlook on my cell phone, which is not a bank-owned cell phone, but just to make sure that I am accessible when needed.' (P7, Female, Employee)

## Theme 6: Well-being

### Sub-theme 1: Work-life balance

One of the findings about work–life balance is that employees are working harder now that they can work remotely. At times, this includes working extended hours and maintaining constant availability. Below are some of the statements from managers:

'[…Y]ou send your emails within working hours like eight till five, but the reality is we often work outside of those times because if, for example, I'm working, it could be offshore, in the UK, for example, you know, it could be depending on daylight saving, it could be a two hours difference.' (P3, Female, Manager)

'…But now with the hybrid method working method, people have laptops, they can always make sure that they do their kids' homework, then later on put an hour in just to ensure that they look at other stuff that can help them obviously be in a better space tomorrow… And also, just to help them, uh overall over the weekend you have, you do have people that would say (P5, Female, Manager) I'm quickly going to log in and catch up on a couple of things.' (P5, Female, Manager)

In addition, some employees felt they had to demonstrate their work ethic by maintaining constant availability:

'I think if you had to ask my boss, he'd tell you we are working a lot harder and a lot longer hours… If not immediately, as soon as possible, we'll answer an email or return a call or get things done. Umm, but that's self-imposed as well. It's not like the business is putting pressure on us or our line manager. I even have my Teams and Outlook on my cell phone, which is not a bank-owned cell phone, but just to make sure that I am accessible when needed. And that in itself causes stress. Because I was on leave on Wednesday and Friday and still answering emails.' (P7, Male, Manager)

One employee raised the importance of establishing boundaries to ensure a healthy work–life balance:

'I've had to make some serious decisions at the start of this year about how I manage my workload every day, how I prioritise my work, and more importantly, now with the line manager gone. And you can imagine if she and I together had escalated that we cannot cope with our workload, now she's gone. She's not been replaced. So, and, an additional big project was added to my workload.' (P8, Female, Manager)

**Sub-theme 2: Benefits of hybrid work**

Notwithstanding the inherent challenges in achieving an optimal work–life balance, employees and managers attest to the significant benefits of hybrid working practices, notably in terms of time saved on commuting and enhanced availability for family-related commitments. These benefits have resulted in improved morale among employees:

'I think people are bit happier, especially the female workers' morale has lifted somehow; I think the flexibility has made them happier…. It's improved moods because they don't have to sit in traffic. Even now, when something is happening in, say, either Joburg or Cape Town, you can avoid the traffic of coming into the office, and then you can be more productive working from home, so that has definitely been a plus.' (P1, Male, Manager)

'…Not having to travel in and out of the office. Time spent on the roads which makes it easier to work longer hours and be more productive because you're not frustrated and angry, and a work-life balance. So, if there's certain things you need to take care of in the house, you can do that in between working. It's made my personal life easier.' (P7, Female, Employee)

# Discussion
## Outline of the results

This study aimed to understand the lived experiences of managers and employees as to how performance management practices have evolved because of remote and hybrid work. The study found that managers and employees use one-on-one and team sessions to track deliverables, discuss work challenges and communicate performance expectations. Virtual communication is a viable choice, although face-to-face is still important. Having clearly defined performance expectations is essential in hybrid and remote work settings. Even though technology monitors productivity, managers should build trust and avoid micro-management. The findings of this study confirm the results of the previous studies.

One of the key findings was that the frequency and quality of communication are paramount for performance management in hybrid settings. The relevance of communication in hybrid and remote work environments is multifaceted. The majority of participants inferred that communication is a critical element of performance management in hybrid work settings. The findings imply that managers must communicate performance expectations and goals to employees and provide continuous feedback on performance. Furthermore, the findings also showed that to have effective performance management, managers must employ different communication methods, such as virtual meetings, email and social media. These findings align with existing research and theories. Abu-Shanab et al. (2021) affirmed that performance appraisals facilitate dialogue between managers and employees. Previous studies have found the importance of effective communication for managing performance in remote and hybrid work environments (Abu-Shanab et al., 2021; Agua, 2004; Cascio, 2000; Depoo & Hyršlová, 2022; Fisher & Fisher, 2011; Lewis-Iley, 2021; Newman et al., 2020; Oakman et al., 2022; Scrivener, 2014; Shockley et al., 2021). The findings of this study support the view that performance management is evolving from measurement and control towards continuous feedback and improvement (Göndöcs & Dörfler, 2021). Another significant finding was that it is essential to have regular team meetings to discuss the progress of work deliverables. These meetings incorporate regular check-ins, which occur as often as daily or weekly. The primary focus of these meetings is to discuss the team's status, the importance of their work and their challenges. Other studies have also shown that team meetings enable performance management in a hybrid work environment (Agua, 2004; Cascio, 2000; Fisher & Fisher, 2011; Newman & Ford, 2021; Scrivener, 2014). Participants also felt that virtual communication was as effective as face-to-face communication and some expressed that they see no difference between virtual and face-to-face communication. This finding correlates with other studies that found video conferencing is a viable alternative to traditional face-to-face communication (Lewis-Iley, 2021). There may be no significant difference between virtual and in-person communication, with appropriate consideration to communication (Lewis-Iley, 2021). Considering the ongoing implementation of

hybrid work arrangements, managers have expressed the importance of continuously conversing with teams and individuals about their performance. Moreover, they have also expressed the importance of having clarity on performance expectations and goals. Managers must be able to articulate expectations with clarity and precision. To ensure that employees meet performance expectations, managers must proactively provide feedback. Additionally, managers should provide regular check-ins to discuss progress and ensure that employees are on track. Managers must ensure that their employees perform as expected by being transparent about performance expectations and providing regular feedback and guidance (Abu-Shanab et al., 2021; Agua, 2004; Caetano, 2011; Fisher & Fisher, 2011; Lewis-Iley, 2021; Newman & Ford, 2021; Shockley et al., 2021).

The research findings also suggest that trust is a significant issue when teams work in a hybrid setting. Managers placed their trust in their subordinates. However, unease became apparent when employees were not forthcoming about their activities during business hours. Employees, in contrast, expressed concern about understated micro-management. This occurs when micro-management is very subtle but still evident. There needs to be a balance between trust and control (Göndöcs & Dörfler, 2021). The study also revealed that some managers increasingly rely on technology to monitor productivity and performance. This reliance on technology to track productivity can be beneficial as it helps to measure objective performance. However, it can also create a culture of micro-management (Krishnamoorthy, 2022; Oakman et al., 2022). This research has demonstrated that hybrid and remote work settings pose a significant challenge in achieving a healthy work–life balance. Both managers and employees reported that they have seen a notable increase in employees working longer hours than ever before, creating a situation where the boundaries between work and personal life have become increasingly blurred. The results of this study also indicate that employees have developed a degree of flexibility in their working days, allowing them to create time for personal and family obligations.

### Practical implications

This study presents an understanding of the effects of hybrid work arrangements on interpersonal work relationships. It appears feasible to sustain strong ties with subordinates, managers and colleagues, even with the physical separation of this type of arrangement, through suitable tools and capabilities. Employers must ensure employees can access the resources and training required to work in hybrid settings. As the world adapts to the changing work environment, managers must understand how to best adapt their performance management practices in a hybrid work setting to ensure employees are held to the same standards, regardless of location. To do this, managers must create clear employee expectations, be clear about goals and performance expectations, and provide continuous, prompt feedback. Furthermore, video conferencing tools can facilitate remote meetings and check-ins, allowing for more efficient communication between managers and employees.

### Limitations and recommendations

The scope of the study was limited because the sample was a smaller group of managers and employees in the banking sector. The hybrid and remote work models have become increasingly popular in recent years. It has been the subject of much research in recent years. While this study provided valuable insight into performance management practices in hybrid and remote work settings, it is essential to observe that the findings apply to a limited set of circumstances. Because of the unique nature of each corporate environment, it is impossible to make generalisations about what works and what does not in other corporate environments. To further elaborate on the findings of this qualitative study, it may be advisable to conduct a quantitative study to understand the findings better. Moreover, this study has shown that electronic employee productivity and performance monitoring are becoming increasingly popular. However, the detrimental effects of electronic monitoring were outside the scope of this study. Further research is needed to understand the long-term effects of electronic monitoring and to ensure that employees are not subjected to unnecessary stress.

## Conclusion

The pandemic has transformed the world of work and performance management was also affected as managers are expected to measure and evaluate performance in hybrid environment. Successful performance management in hybrid and remote work settings is contingent on effectively communicating between managers and employees. Team meetings are essential to performance management in hybrid work settings. Team meetings can foster team unity, trust and accountability by providing a forum for team members to collaborate, communicate and provide feedback. Furthermore, clearly understanding what is expected in performance cannot be underestimated. Managers must proactively give their employees feedback to meet performance expectations. Scheduling regular check-ins is essential to ensure that employees stay on track. It is also vital to provide employees with clear goals and objectives and regular updates on progress. Employers have become increasingly reliant on technology to track and measure employee performance and productivity. Technology has revolutionised the way people work, but it should not be used to replace trust. Changing to new ways of working and managing outputs is one of the most prominent challenges managers face in hybrid and remote work settings. Furthermore, this study has indicated that performance management is changing, with an evolving focus away from measurement and control towards continuous feedback.

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### Competing interests

## Authors' contributions

C.M.M. and N.M. contributed equally to this article.

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