Managing Leader Core Values at Work
A Practice – Oriented Approach

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A leader's values influence how they see people and situations as well as how they act at work. Managerial leaders can benefit by having a practical and systematic approach to managing their core values. After defining values, presenting a Core Values-Management Cycle and offering some benefits associated with this process, a proven practical seven-step approach to applying this process in the workplace is presented. The article also provides a real world example of this approach being applied with an executive. The positive impacts and outcomes of this application are noted. Some challenges that this approach presents are also reviewed.

INTRODUCTION

The study of values, in the current context, draws from the leadership and organizational behavior literature (Herbst & Houmanfar, 2009). From this point of view, values are defined as strong convictions that influence attitudes, and behaviors at work (Chatman, 1989; Bardi & Schwartz, 2003; Kerns, 2003). They are foundational to human behavior and relevant to all people (Schwartz, 1999; Schwartz & Bilsky, 1987; Rokeach, 1973; 1979; Maio, Olson, Bernard & Luke, 2003). Values are also an important dimension for leaders to consider when evaluating and auditing the results they achieve (Kerns, 2015). While values can be examined on both the individual and organizational level (Hoffman & Woehr, 2006; Kristoff, 1996), this article will focus on values management relating to the individual leader and his/her development.[1]

Although research reveals that values are relatively stable across time, some investigators have chosen to make a distinction between core values which show stability over time and peripheral values which seem more situationally dependent (Perrewe & Hochwater, 2001; Williams, 1979). The current work shows how an individual leader within an executive coaching relationship can manage a practice-oriented values management process which targets a leader's set of core values. A leader's enhanced self-knowledge of his/her core values is especially helpful when making value congruence judgments. In particular, leaders can likely benefit from knowing to what extent their values are congruent with other people's and with their organization's values (Johnson & Jackson, 2009; Kristof, 1996; Liedtha, 1989; Jehn, Chadwick & Thatcher, 1997). A productive starting point is for leaders to systematically examine and then manage their values.

Values clarification and management also connects to the scientific study of individual differences within the field of differential psychology (Antonakis, Day & Schyns, 2012; Chernyshenko, Stark, & Drasgow, 2011). The investigation of how an individual's unique configuration of values may impact

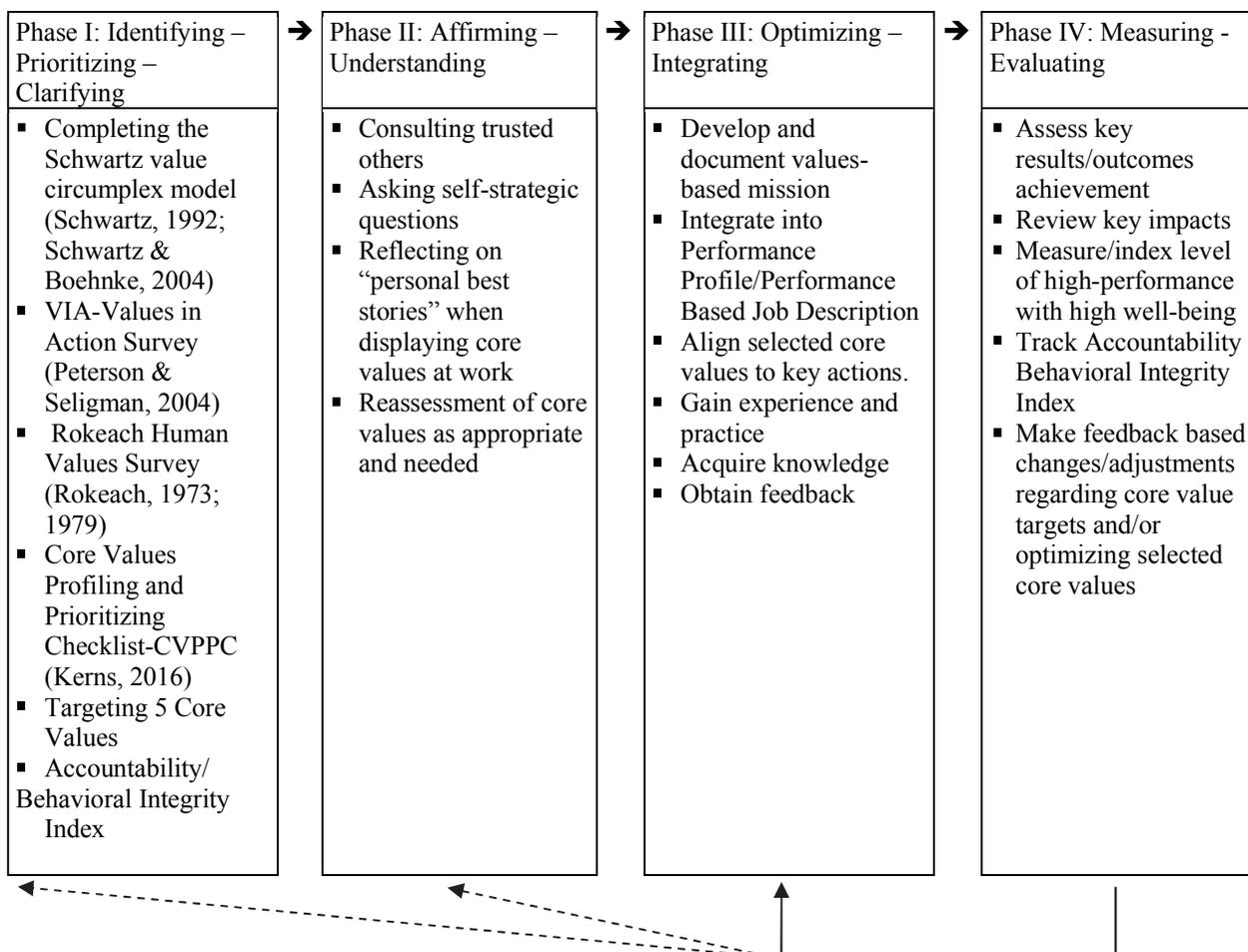Journal of Leadership, Accountability and Ethics Vol. 14(1) 2017   11

behavior and performance is useful to the field of leadership and leader development (Gehman, Trevino, Garud, 2012; Agle & Caldwell, 1999). This article is intended to provide an approach for practitioners to adapt, and for applied researchers to investigate further.

This important topic of leader values management is explored using information collected from the "real world" (Locke, 2007, Locke & Cooper, 2000). [2]The approach offered is supported by a review of relevant literature and decades of study and practice by the author and his colleagues. The framework is intended to help managerial leaders more effectively address their unique set of core values in a way that contributes to their development and effectiveness. This work also helps contribute to the rather sparse amount of extant literature relating to practice oriented evidenced-based approaches to leader values management (Byrtek & Dickerson, 2013).

THE CORE VALUES – MANAGEMENT CYCLE

As discussed in this article, values management seeks to help leaders identify, prioritize, and affirm their core values so that they can integrate their core values into their daily lives to optimize workplace performance. The Core Values-Management Cycle depicted below helps "operationalize" the definition of values and the related process in a general way.

FIGURE 1
CORE VALUES – MANAGEMENT CYCLE ©

Phase I: Identifying – Prioritizing – Clarifying	Phase II: Affirming – Understanding	Phase III: Optimizing – Integrating	Phase IV: Measuring - Evaluating
▪ Completing the Schwartz value circumplex model (Schwartz, 1992; Schwartz & Boehnke, 2004) ▪ VIA-Values in Action Survey (Peterson & Seligman, 2004) ▪ Rokeach Human Values Survey (Rokeach, 1973; 1979) ▪ Core Values Profiling and Prioritizing Checklist-CVPPC (Kerns, 2016) ▪ Targeting 5 Core Values ▪ Accountability/ Behavioral Integrity Index	▪ Consulting trusted others ▪ Asking self-strategic questions ▪ Reflecting on "personal best stories" when displaying core values at work ▪ Reassessment of core values as appropriate and needed	▪ Develop and document values-based mission ▪ Integrate into Performance Profile/Performance Based Job Description ▪ Align selected core values to key actions. ▪ Gain experience and practice ▪ Acquire knowledge ▪ Obtain feedback	▪ Assess key results/outcomes achievement ▪ Review key impacts ▪ Measure/index level of high-performance with high well-being ▪ Track Accountability Behavioral Integrity Index ▪ Make feedback based changes/adjustments regarding core value targets and/or optimizing selected core values

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Phase I: Identifying-Prioritizing-Clarifying

Various assessment instruments are available for identifying, prioritizing, and clarifying one's values. The Values in Action (VIA) survey consists of a 240 item questionnaire that assesses one's values/character strengths from a universe of 24 universal values (Peterson and Seligman, 2004). Upon completing this survey, respondents are provided with a list of their top five values. Also, The Schwartz value circumplex model provides a review of ten value types (Schwartz, 1992). A longstanding human values survey authored by Milton Rokeach which divides values into terminal and instrumental values is also a useful tool in helping individuals identify their values (Rokeach, 1973; 1979). Additional assessment tools are being developed such as the Core Values Profiling and Prioritizing Checklist (CVPPC) to help leaders identify and prioritize their core values (Kerns, 2016).

Phase II: Affirming-Understanding

Once one's values have been identified and prioritized into a set of core values, it is important that these values be affirmed and understood. This process of affirming and understanding involves seeking input from others to confirm agreement with the five identified core values. These consultations should be with "trusted others" who know the individual well and are willing to give honest feedback. This dialogue should help the individual better understand how his or her identified core values may be reflected in his or her behavior. Also, in affirming the five identified core values, strategic questions such as "Do I feel a sense of ownership, and authenticity while expressing them?" should be asked. Reflecting on "personal best" stories, or situations where the individual has performed exceptionally well while displaying a core value, is also a useful way to help affirm and more fully understand an identified core value (Roberts, 2013). If reassessment appears to be warranted after this process, then the individual should re-assess his or her values, then proceed accordingly with a fuller understanding of himself/herself on this individual difference domain.

Phase III: Optimizing-Integrating

After identified core values have been affirmed, many useful things can be done to help optimize and integrate the execution of those core values into one's work. For example, developing and documenting a values-based mission is important (Herbst & Houmanfar, 2009). This process helps to optimize and integrate the execution of core values at work by providing purpose, meaningfulness and positive motivation. The execution of core values is also supported by the development and integration of those values into a Performance Based Job Description/Performance Profile (Kerns, 2001). The experience gleaned from displaying core values in new and challenging ways is also invaluable to the development of those values. Core values are like muscles – they need to be exercised to grow strong. In addition, the acquisition of knowledge and the enhancement of skills related to applying one's core values are key optimizing tactics. Obtaining useful feedback on how effectively one is displaying his or her core values is also important to optimizing and integrating the development of core values at work.

Phase IV: Measuring-Evaluating

Measuring and evaluating the impact that one's values management efforts are having on the attainment of key results and other important outcomes is a key component in the cycle. Measuring and evaluating performance and well-being are especially important in determining if leaders are acting in alignment with their core values at work. When a leader acts in alignment with his/her core values, his/her behavioral integrity is improved. Feedback gleaned from this measurement and evaluation process also becomes a basis for making behavioral changes and/or adjustments to optimize and integrate core values at work (Phase III).

THE VALUE OF MANAGING VALUES

The process of systematically managing values offers benefits in many areas. There is evidence that followers internalize organizational values when they perceive that their leaders are practicing behaviors associated with espoused core values (Hannah, Schaubroeck & Peng, 2016). It seems that leaders can serve as role models and perhaps influence follower's level of values as well as mission internalization (Marimon, Mas-Machuca & Rey, 2016). Bourne and Jenkins (2013) also indicate how values influence many organizational processes and outcomes such as management decision-making, employee commitment and linkages with external stakeholders. Their research presents findings from the literature that link organizational outcomes with managerial leader values. They also underscore the connection between the espoused values of key executives and the frequent assumption that these assertions reflect organizational values. These observations reinforce the importance for leaders to identify, understand and manage their values since they have significant impacts on stakeholders as well as organizational processes and outcomes (Watson, Papamarcos, Teaguw & Bean, 2004).

A leader's values also influence the perception of strategic situations, options and change strategies (Bansal, 2003; Pant & Lachman, 1998; Carlisle & Baden-Fuller, 2004). On a practical level, it is important for leaders to understand and thoughtfully manage values during strategic planning and direction setting activities (Williams, 2002; Carter & Greer, 2013). Also, middle managers have significant roles to assume in helping to align an organization's strategic initiatives with values. This process of aligning employee values and organizational goals is likely advanced when managerial leaders at all organizational levels understand and manage their own core values. This should include having an individually crafted values-based mission statement (Herbst & Houmanfar, 2009).

When leaders are more aware of their core values, they are better equipped to manage the key process of systems alignment relating to facilitating the integration of organizational values into key practices such as human resource management. Leaders with core values self-knowledge are also more likely to effectively manage situations where there are values misalignments within an organization which may include recognizing and managing their own values gap (Van Quaquebeke, Graf, Kerschreiter, Schuh & van Dick, 2014; Brown & Trevino, 2009). Having practical frameworks and tools for understanding and managing values will help the leader to identify personal misalignments and to help others to recognize and consider their own value misalignments.

Beyond these observations, when a leader focuses on his/her core values his/her performance and well-being will likely be enhanced. Effectively managing core values is a positive condition which helps a managerial leader function at an optimal level by using core values in impactful ways (Kerns & Ko, 2010; Kerns & Ko, 2014; Longenecker, 2013). The application of a leader's core values to challenging situations, as noted earlier in the Core Values – Management Cycle, is an effective way to optimize and integrate one's values at work. Managerial leaders who can also effectively challenge their people to develop and use their values at work will likely help their people grow and be more successful in achieving individual and organizational goals (Gehman, Trevino & Garud, 2012). When leaders are able to optimize and integrate their values at work, they may experience a more generalized "spill-over" effect in other domains of their life (Greenhaus & Powell, 2006), such as interacting with their families to positive effect. While further support is needed, it is a promising prospect if practicing values-management at work can help one be more effective and experience greater well-being in roles beyond the workplace.

A SEVEN STEP APPROACH

To put further practical utility to the values management concepts provided in this article, the following seven step approach is offered as a specific adaptation of the Core Values – Management Cycle above. This values management process, developed in the context of executive coaching to help leaders focus on their core values, provides one avenue by which organizational leadership may become and/or

may lead their people to become higher performers with higher well-being (Kerns, 2008; Caza & Wrzesniewski, 2013).

Step 1: Positioning Values Management

The first step in the seven step process is intended to serve as the "motivating preamble" to initiating a Values Management Program. The coach should review some of the benefits of this approach, orient the client to this systematic and interactive process, and seek to gain commitment for using the approach from the participant being coached.

Step 2: Identifying, Prioritizing and Clarifying Values

Using appropriate assessment tools, which may include those previously noted in the discussion of the Core Values – Management Cycle (e.g., Core Values Profiling and Prioritizing Checklist or the Values in Action Survey), the executive coach will facilitate the client in identifying, prioritizing and clarifying his or her five core values, then discuss what each of the core values looks like in behavioral terms when displayed at work.

Step 3: Affirming and Understanding Values

Once the five core values have been identified, prioritized and are understood, ask the client to do at least three things to affirm that these five values accurately represent his or her core values. This affirmation process helps the individual better understand his/her core values. First, the client will share his/her top five core values with several "significant others," people who know the client well and who will be willing to provide honest feedback regarding how much they see a specific value being displayed by the individual. Second, ask the client to answer a number of strategic questions for each of the targeted core values including, "How much is this value really representative of you?" and "How have you specifically displayed this core value at work in the past 90 days?" Third, ask the client to reflect on situations (three are recommended) when the client was his/her personal best and to describe how the targeted core values helped to make the outcome a "personal best." The goal is to have the client to (1) affirm that the five identified core values are indeed his or her top five core values, and (2) understand those values and how they can be used to help enhance impact at work.

Step 4: Developing and Documenting a Values-Based Mission

The executive coach next asks the client to develop and document a one to three sentence value-based mission statement. This document consists of a short paragraph or sentence integrating all five of the leader's core values. The value-based mission statement is re-worked and edited until the individual finds the statement relevant, congruent with how the client sees him/herself, and positive in tone.

Step 5: Personal Best Stories

Since it is often new and unfamiliar for individuals to explicitly talk about their core values, ask your client to recall and relay several personal best stories that exemplify how he or she has used one or more core values in specific situations to "bring out" his or her personal best (Roberts, 2013). If the client has had little experience in explicitly applying the identified core values at work, facilitate the client to generate stories of how he or she sees these core values being applied in specific situations in the future. This step is important to help further affirm and understand core values as well as to optimize and integrate values at work.

Step 6: Design a Performance Profile or Performance-Based Job Description

Facilitate the client in developing a one to two page performance profile or performance based job description for the client's current position (Kerns, 2001), integrating the individual's core values into this performance management document. This helps focus and further optimize the individual's work in managing values and integrating core values into the current work role.

Step 7: Execute, Coach and Connect to Key Results/Outcomes
Using a self-coaching or executive coaching approach, each individual is introduced to the Core Values – Management Cycle and asked to regularly review and evaluate how well he or she is managing the identified core values at work. This evaluation includes a review of the progress in attaining key results and in achieving status as a high performer with high well-being (Kerns, 2008). The managerial leader is encouraged to track his/her Accountability/Behavioral Integrity Index wherein he/she notes from 1 to 10 (10 being the highest) how aligned his/her actions are with his/her targeted core values.

APPLYING THE SEVEN STEP APPROACH – AN EXAMPLE

To illustrate and assist in putting the Seven Step Approach into use, the following example is offered.[3] John is the Chief Operating Officer (COO) within a division in a large global organization. He has eight key reports and he reports to the CEO for International Operations. In the context of executive coaching, what follows is the adaptation/customization of the Seven Step Approach to Values Management to John's situation in his role as division COO. This program was part of a larger performance management consulting assignment within John's division.

Step 1: Positioning Values Management
The executive coach oriented John to the overall Seven Step Approach and highlighted a number of benefits that this approach offered him. Benefits that were reviewed included:
- John would be able to identify what he values the most at work, and have a systematic way to focus on and manage his core values for greater impact.
- This evidence based approach underscores the benefits in practicing values based leadership.
- With coaching, John could learn to apply this approach with his eight key reports.
- This approach would help directly drive his key result of increasing the number of people displaying high performance with high well-being in his division, starting with himself.
- John would have a more focused way to track his accountability and behavioral integrity as it relates to displaying his core values at work.

After reviewing each of the program steps, John was probed for his level of commitment for completing this program. His commitment level was very high and he was especially interested in exploring how he could be coached to apply this process with his key reports.

Step 2: Identifying, Prioritizing and Clarifying Values
John was asked to complete both the Values in Action Survey (VIA) on-line and the Core Values Profiling and Prioritizing Checklist (CVPPC). In consultation with the executive coach, John identified the following five core values as his:
- Achievement
- Assertiveness
- Authenticity
- Fairness
- Innovation

These values became his five core values and were the focus of his value based development program.

Step 3: Affirming and Understanding Core Values
While John was quite confident that he had identified his top five core values accurately and understood them, he was asked to do two things to affirm and to perhaps even more fully understand them. First, he identified several trusted individuals who knew him well to comment on whether they saw him displaying these five strengths at work. He sought input from his boss, a report and a peer from

another division within his company. Second, he was asked to respond to the following questions with regard to each of his top five core values, using a rating scale of 0 to 10 (10 being the highest):

> Q1:   To what extent does practicing this value really represent my core convictions as a leader at work?
> Q2:   To what extent do I act in alignment with this core value at work?
> Q3:   To what extent is it relatively easy for me to think of challenging consequential situations where I could display this core value?

Both his consultations with others and his ratings and associated comments to the strategic questions affirmed to John that all five of these values were indeed his core values.

Step 4: Developing and Documenting a Values-Based Mission

John found the wording of his values-based mission challenging to complete. It was difficult to integrate his five core values into one to three sentences. As is often the case, the executive coach drafted several versions; ultimately, John's values-based mission read as follows:

> "Displaying *assertiveness, fairness,* and *innovation* while being *authentic* in striving to *achieve* desired results." After engaging in this step, John found his values-based mission to be relevant, congruent with how he saw himself and positively motivating. He proceeded to have this statement printed on a 3 x 5 card and laminated for easy referencing.

Step 5: Personal Best Stories and Examples

To help optimize and integrate his core values and to further affirm them, John was asked to describe several personal best stories which indicate how he displays his core values at work. Being outgoing and clearly aligned with his core values, this task was not difficult for him. One of the personal best stories that he shared and linked to his core values concerned a supply chain implementation project that he led. He offered that this project drew upon his core values relating him to be innovative, fair-minded and assertive in a variety of negotiation situations. He also disclosed how he displayed his core values of achievement and authenticity to mold the project group into a high-functioning and effective team. He also stressed how he fairly allocated resources during the course of this project and facilitated the completion of the work within agreed upon specifications.

Step 6: Design a Performance Profile or Performance-Based Job Description

John and the employees in his division had previously completed a performance based job description as part of the installation of a Performance Management System. This tool specified the key results, key actions, people and technical skills for which each employee was held accountable. As part of the Seven Step Approach, John modified the previous version of his performance profile, editing the wording of several key actions which were associated with his agreed upon key results. These edits, for example, included adding "providing assertive feedback" and "proactively being innovative" to his performance profile as key actions intended to positively impact his key results. The addition of these two core values (i.e. assertive and innovative) helped to strengthen his key actions related to the key result of increasing the number of high-performers with high well-being within his area of responsibility.

Step 7: Execute, Coach and Connect to Key Results/Outcomes

With his executive coach, John reviewed the Core Values – Management Cycle focusing on the "Optimizing and Integrating" and "Measuring and Evaluating" components. The coaching engagement was extended to include John being coached to apply the seven step approach with his direct reports. He especially wanted support in facilitating his key reports in affirming and understanding their core values and on the development of their values based mission statements. As part of step seven, John and his

coach regularly evaluated how he was doing in displaying his core values and how these efforts were impacting his key result areas, especially relating to increasing the number of high-performers with high well-being.

This Seven Step Approach is straightforward, practitioner-oriented, and provides a systematic approach to enhancing an individual's values based management for performance enhancement. It is also emerging from work in the field that this process can be delivered using a "coach the coach" method, as was done with John as he worked with his key reports with the support of this executive coach.

SOME CHALLENGING ISSUES

The implementation of values management programs is not without some challenging issues. There is a need to have practical and user friendly assessment instruments for busy leaders to identify, prioritize and affirm core values. In addition to being psychometrically sound, these tools must label values in ways that have face validity for business practitioners. The Core Values Profiling and Prioritizing Checklist is, for example, being developed to address this need and consists of 75 simply stated values gleaned from evidence based sources (Kerns, 2016).

Developers of approaches to values based management are also challenged to link the relatively soft processes of identification, prioritization, affirmation and understanding, with more rigorous business outcomes/metrics and key results. The research, for example, showing the connection between virtuous behavior, productivity and profits may help stimulate the development of systematic approaches to values management that link the "softer" measures with "harder" business metrics (Luthans, 2002; Cameron, 2014).

The investigation and development of values management in the workplace also needs to proceed using a balanced approach that supports enhancing an individual leader's management of his/her values while recognizing the need for organizations to address how they strategically address organizational values. The challenge is to seek alignment between organizational and individual values. In fact, recent work informs us of the importance of ensuring that values are aligned across organizational boundaries (Bezrukova, Thatcher, Jehn, & Spell, 2012; Paarlberg & Perry, 2007). Closely associated with the alignment/congruence challenge is the need to regularly measure and monitor or otherwise account for values within an organization (Barrett, 2006). The regular accounting of organizational values helps leaders better recognize the connection between the execution of values and related practices and performance. Values alignment across an organization including the core values of leaders likely enhances performance outcomes (Bezrukova, et al, 2012).

Another challenge is to actually get leaders to explicitly display their core values more often at work and to more deliberately manage them. In turn, leaders are challenged to encourage and support their people to engage in value-based actions at work. Managerial leaders play a key role in supporting and encouraging their people to display their values at work. They can serve as positive role models by displaying value-based practices at work. This effort, however, requires leaders to recognize the benefits in having their people utilize their values, and highlights the need for managerial leaders to have useful approaches to identify and facilitate the expression of their people's values at work.

Finally, given the paucity of evidence based frameworks for practitioners to review and consider, it would be wise to challenge practice-oriented applied researchers to explore additional approaches to help leaders effectively manage values at work. This work would be especially beneficial if these approaches integrate practices into a practical and coherent process. Beyond the current framework and approach offered here, applied researchers and/or evidenced-based oriented practitioners are challenged to develop additional programs to help managerial leaders better understand and manage their core values at work. Byrtek and Dickerson (2013), for example, offer a practice-oriented eight-step model for core value actualization which addresses the challenge to develop additional approaches that support leaders in increasing their competence in managing their core values at work.

SUMMARY STATEMENT

Organizational leaders can benefit by having practical approaches that help them identify and manage their core values at work. Effectively managing core values contributes to enhancing managerial leaders' positive impact in workplace settings. There is a need for applied researchers and practitioners to continue to look for new ways to support leaders in their efforts to effectively manage values at work. As this work progresses, there will be a need for useful assessment tools, linkages between softer process measures with harder business metrics, value alignment strategies and additional practice-oriented approaches to help leaders effectively manage their core values at work. All of these efforts will likely help managerial leaders competently advance, along with their people, toward high-performance with high well-being (Kerns & Ko, 2014; Robertson & Flint-Taylor, 2009).

ENDNOTES

1. A debate comparing and contrasting management and leadership has occurred over more than thirty years. In this article the terms managerial leadership, management and leadership are used synonymously.
2. The methodology is in keeping with Locke (2007) as well as Locke and Cooper's (2000) assertion that qualitative data obtained from a variety of available sources, including interviews with structured questioning, field observations, and other less quantitative methods of inquiry can legitimize an approach that is based on the integration of real-world facts.
3. This example is drawn from the author's work as an executive coach/trusted advisor with a key executive. For confidentiality purposes, identifying information has been changed.

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