

Optimizing Performance, Well-Being and Well-Doing: A Leader Practice-Oriented Approach

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Performance, well-being, and well-doing are foundational key results that leaders need to be held accountable for and encouraged to assess, optimize and evaluate. This foundational, interdependent and synergistic triad of vital organizational key results is advanced when leaders effectively execute the practices associated with optimizing these results for positive impact. A practice-oriented approach is offered to help leaders optimize performance, well-being, and well-doing. After presenting a Leader Performance Well-Being Well-Doing Cycle, and some benefits associated with this framework, a five-step process for applying this approach is provided. Some challenges are also offered, including having leaders consider how their Internal Operating System (IOS) positively or negatively impacts their and others' performance, well-being, and well doing.

Keywords: accountability, leader, optimize, practices, key results-impacts, performance, well-being, well-doing

INTRODUCTION

Leaders substantially impact those they lead and their significant others (Bakker & Demerouti, 2013; Ford et al., 2007; Lin et al., 2023).¹ Over the past several decades, I have asked, “Have you ever not talked about your boss outside of work?” No one has answered yes. A leader’s impact has a ripple effect on their people and their report’s significant others (Yang et al., 2018). Having such a broad impact leaders must strive to optimize their own and others’ performance, well-being and well-doing. During my career, including leading a large complex service organization, advising/consulting organizations and their leaders as an industrial-organizational psychologist and performing as a business school professor, I have come to recognize the importance of performance, well-being and well-doing as they relate to leader effectiveness. As a key executive, like many others occupying this role, I primarily focused on getting results by executing performance-oriented practices that produce desired outcomes without fully appreciating the importance of leader well-being and well-doing and how these constructs connect with and help leaders optimize their performance and effectiveness. Understanding and recognition of the value of well-being and well-doing in helping leaders optimize performance has strengthened over the past several decades especially with the emergence of fields of study such as positive psychology, positive organizational scholarship, psychophysiology, neuroscience/brain science and responsible leadership (Boyatzis & Jack, 2018; Cameron & Spreitzer, 2012; Kempster et al., 2019; Pless & Maak, 2022; Puspa, 2022; Seligman, 2011).

Performance at work in this article means and refers to a set of observable actions intended to impact key results and desired outcomes and includes practices such as setting a clear motivating direction, providing operational focus and linking with resources. In turn, **well-being** is operationally defined by evidence-based practices that include the following (Kerns, 2018; Kerns & Ko, 2014):

- Fostering and managing engagement
- Promoting and managing positivity
- Profiling and managing time perspectives
- Managing strengths
- Making work purposeful and meaningful

Finally, **well-doing** means acting proactively and intentionally for the benefit of others (Kerns, 2023a). Leaders who make wise value-added contributions using an assertive yet warm tone signal that they care and effectively teach others are demonstrating practices associated with well-doing (Kerns, in press).

The practices associated with optimizing performance, well-being and well-doing must be assessed and effectively executed across organizational levels. A framework for assessing, optimizing and evaluating the execution of these practices will be briefly presented. This framework is based on the Linkage Research Model (LRM) and has been adapted by myself and colleagues in many organizational settings (Kerns, 2002; Kerns & Ko, 2014; Wiley, 2010). LRM can be displayed as a clock as depicted in Figure 1.

FIGURE 1
LINKAGE RESEARCH MODEL (LRM):
ASSESSING PERFORMANCE WELL-BEING AND WELL-DOING PRACTICES



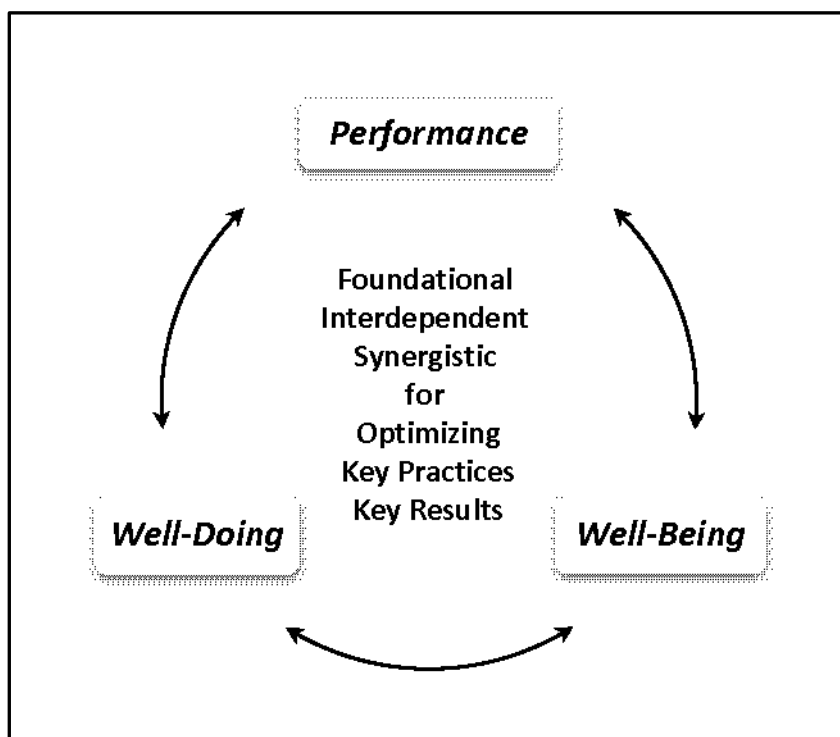
As we assess and measure using the LRM, at the 12:00 o'clock position of the LRM we would include the leadership practices associated with performance, well-being and well-doing. At 3:00, 6:00 and 9:00, respectively, are key results and desired outcomes for employee, customer and organizational/business. The main objective of the linkage research approach is to identify managerial leadership practices operating in the environment (the current circumstance being leader performance, well-being, and well-doing practices at 12:00 o'clock) that influence employee performance, well-being and well-doing as well as customer relations and organizational/business results. To achieve this, managerial leadership practices are assessed and correlated with employee and customer survey data and with other key organizational metrics such as overall organizational performance, well-being, and well-doing. (When applied in the current context the LRM is used to assess individual and group-team performance, well-being and well-doing across organizational levels.)

Given the current global epidemic of bad leadership, it is vital that leaders have frameworks and tools to help them more effectively execute and assess their effectiveness as managerial leaders (Lusk & Hayes, 2022; Örténblad, 2021). Bad leaders can be considered ineffective, incompetent or abusive. Ineffective leaders are those who do not achieve agreed upon key results. Incompetent leaders are those who cannot

competently respond to the demands and requirements expected of them. Abusive leaders display negative social behaviors such as blaming, excluding others and bullying (Einarsen & Fosse, 2022; Leslie, 2022). In this light and with the understanding and recognition that leaders have a substantial impact on their people and their report's significant others, it seems important that key areas which leaders' influence be considered as targets for optimizing leader effectiveness.

Performance, well-being and well-doing are three foundational and interdependent synergistic key results. Each has key associated practices that, depending on how they are executed, can positively or adversely impact leaders' effectiveness and development. The optimizing performance well-being well-doing framework offered below in Figure 2 provides a visual orientation for leaders to grasp this framework's foundational, interdependent and synergistic nature. The discussion which follows Figure 2 further illustrates the triadic relationship between performance, well-being, and well-doing.

FIGURE 2
PERFORMANCE WELL-BEING WELL-DOING OPTIMIZING FRAMEWORK ©



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To bring additional practical utility to managing and optimizing performance, well-being and well-doing, I frequently present leaders with the graphic in Figure 2 which offers a visual display of the key components represented in the performance well-being well-doing optimizing framework. This visual summary helps leaders and their teams quickly see the essential elements they will be endeavoring to effectively manage and optimize. Typically, this figure is introduced to leaders in advance of implementing programs for optimizing performance, well-being and well-doing such as the four phased leader cycle as well as the five-step approach offered in this article.

When reviewing and discussing optimizing performance, well-being and well-doing, it is valuable to note the important role that alignment plays within and between these three components. For example, performance as a key result needs to be aligned with key practices selected as targets for action planning. Also, it is important to note that this process needs to be seen as foundational, interdependent and synergistic in driving the attainment of key results and desired outcomes.

Performance, well-being and well-doing are foundational, interdependent, synergistic key results which are optimized when aligned with the right practices and executed competently. Optimally they come together to form a positively impactful triadic relationship.

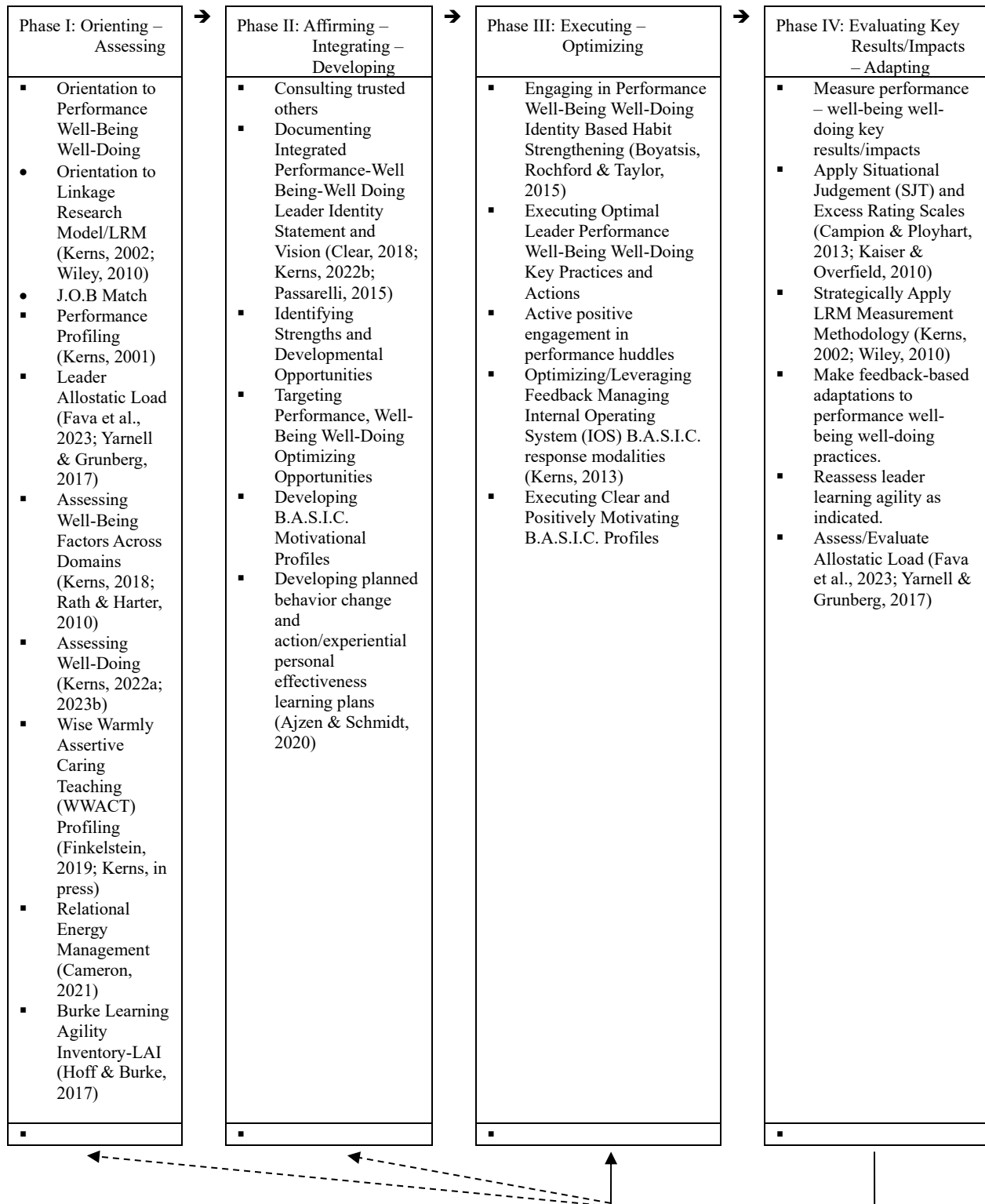
This work helps contribute to the paucity of extant literature on practice-oriented evidence-based approaches to explicitly manage performance in connection with well-being and well-doing (Barends & Rousseau, 2018). Further, this article is intended to provide an approach for practitioners to adapt and for applied researchers to study further. This important topic uses information gleaned from applied organizational settings (Locke, 2007; Locke & Cooper, 2000). The approach offered is supported by a review of relevant literature and decades of study and practice as part of an integrated system of managerial leadership.² The frameworks offered are intended to help leaders more effectively address the practices associated with performance, well-being, and well-doing to optimize their value-added contributions and impacts for stakeholders.

LEADER PERFORMANCE WELL-BEING AND WELL-DOING CYCLE

Optimizing leader performance, well-being and well-doing endeavors to help leaders assess and gain an integrated understanding of the key results and key practices that are associated with each of these interdependent components. When effectively executed, these areas can positively impact organizational key results, including performance, well-being and well-doing. These three components can be viewed as both key results and key practices. In this process, leaders are guided in executing and optimizing these practices while measuring and adapting their actions to optimize their leadership effectiveness and impact. The leader performance well-being well-doing cycle depicted below in Figure 3 provides a framework to help operationalize the process of helping leaders optimize their impacts across diverse situational contexts.

In the framework, the four phases are presented in chronological order of the leader's performance, well-being well doing cycle. However, the four phases are interrelated and dynamically interact in practice. The discussion which follows Figure 3 describes the components and the interplay among them.

FIGURE 3
LEADER PERFORMANCE WELL-BEING WELL-DOING CYCLE ©



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Phase I: Orienting – Assessing

In Phase I leaders are oriented to some key perspectives relating to optimizing performance, well-being, and well-doing, including reviewing the optimizing framework as previously presented in Figure 2. Leaders must understand and appreciate that performance, well-being and well-doing can be viewed as a dynamic triadic relationship (Figure 3). Depending on how they are executed each component in the triad can individually and collectively influence leader effectiveness and the attainment of key results. The J.O.B. match framework further helps leaders understand how their leadership position/job (J) is influenced by their bosses' job performance (B) and the operating environment (O) in which they practice leadership. Having leaders rate their satisfaction with each component in the J.O.B. framework can be revealing in helping them more fully understand the connection between their own well-being and well-doing concerning their bosses' job performance and effectiveness in executing well-being and well-doing practices. Orienting leaders to the notion that there is a spillover effect of their leadership practices at work to their families and to the significant others of those they interact with at work provides a useful perspective. These interactions can be positively energizing and/or stress-inducing. It is also valuable for leaders to gain a perspective on the role of allostatic load in influencing leaders' effectiveness. More specifically, leaders need to understand the importance of acting in ways that prevent them from experiencing allostatic overload inside and outside the workplace (Fava et al., 2023; Yarnell & Grunberg, 2017).

During this phase the leader considers selective assessments and processes to complete which help the leader better understand themselves about performing in their current position as well as executing practices associated with well-being and well-doing. Developing a performance profile on the position the leader occupies is a valuable tool (Kerns, 2001). This process includes having the incumbent identify four to six key results and four to six specific key actions needed to positively impact and influence the achievement of the specified key results. Several assessment tools are available to assess leaders' well-being including the Well-Being – Domain Application Matrix (Kerns, 2018) and the Well-Being Finder and the Well-Being Daily Tracker (Rath & Harter, 2010). Further assessment of the practices associated with the wise, warmly assertive caring teaching (WWACT) leader role is helpful. Related to this role is the need for additional assessments to help leaders index their well-doing. Currently, efforts are underway to develop additional practical tools to help leaders assess their well-doing profile, including a well-doing rating scale and behavioral checklist (Kerns, 2023b).

Phase II: Affirming - Integrating - Developing

Leaders first query others they trust for feedback regarding the observations and information they gleaned from the assessments completed in Phase I, to affirm and acquire an integrated understanding of where they are in their current role and in executing well-being and well-doing practices. During Phase II, leaders are facilitated in documenting an integrated well-being well-doing leader identity statement and vision. This process helps them develop identity-based habits that strengthen their identities as optimal leaders in executing their current role and enhancing well-being and well-doing (Clear, 2018; Kerns, 2022b). In addition to an identity statement, a personalized vision is developed around how they see themselves executing their performance profile to help effectively achieve each of the key results that they specified. As part of this process leaders specifically target their performance, well-being and well-doing opportunities that will assist them in improving their effectiveness in each of these three areas.

Phase III: Executing - Optimizing

During this phase, the work completed relating to identity and vision development is extended to apply prior efforts to the performance profile. Drawing from their performance profile and their personalized optimal leader performance well-being well-doing profile, leaders visualize their identity in action across varying situational contexts. Leaders work to leverage feedback received when engaging in this identity work and in their efforts to create and communicate their vision of themselves as part of optimizing performance well-being and well-doing.

As leaders execute their performance profile, they work toward successfully driving performance, well-being and well-doing as key results. Throughout this process, leaders are encouraged to manage their internal operating system (IOS) to optimize the execution of their performance profile. As part of this process, leaders are encouraged to actively and positively engage in regularly scheduled performance huddles with their trusted advisors to assess how the execution of their action plans impacts the achievement of key results and desired outcomes.

Phase IV: Evaluating Impacts - Adapting

A key component of the cycle is evaluating the impact of one's efforts at optimizing the practices associated with performance, well-being and well-doing on attaining key results and other desired outcomes. Various measurements can be used to assess the impact of the leader's efforts in executing key actions and practices associated with their performance profile (typically focusing on four to six key results).

The reliability and validity of these assessments substantially hinge on having clear observable behavioral definitions for each of the practices in a performance profile. The key results measurements are useful in measuring leadership practices at the 12 o'clock position in the LRM evaluation/measurement approach (Figure 1). Making ongoing adaptations and regular adjustments to the leader's performance profile based on feedback is a key part of Phase IV. Situational judgment testing has proven useful in helping leaders measure their effectiveness in adapting their actions to drive the key results of performance, well-being and well doing.

While various assessments are available to measure well-doing, the measurement of well-doing is in its infancy. Excess rating scales and checklists have been employed to measure the practices associated with the WWACT leader role. Finding ways to measure non-traditional business outcomes such as wisdom and allostatic load in workplace settings is challenging. Feedback obtained from this evaluation process has become a basis for making behavioral changes and/or adjustments to optimize the execution of practices associated with performance, well-being and well-doing. It has also become a source of feedback to indicate the need to reassess leaders' learning agility (Hoff & Burke, 2017).

THE VALUE OF OPTIMIZING PERFORMANCE WELL-BEING AND WELL-DOING

The process of optimizing leader performance, well-being and well-doing using a systematic approach offers a number of benefits. The foundational, interdependent and synergistic triad offered in the current work supports a practice-oriented framework to contribute to turning the tide on the unsettling epidemic of bad leadership. Beyond individual leaders' impact in effectively executing these practices to optimize performance, well-being and well-doing, they can serve as positive performance role models. This observation is supported by both conceptual and empirical work relating to the spillover/crossover effects of leader behavior on their reports and their significant others outside of work, especially their immediate family members (Yang et al., 2018). The emerging research showing how a leader's stress and allostatic load can impact significant others in such areas as sleep and weight gain underscores the benefits which can be accrued from having leaders who are effectively executing practices that optimize their performance, well-being and well-doing at work (Lin et al, 2023). Their effectiveness can potentially have positive ripple effects for others both inside and outside the workplace (Carlson et al., 2019).

The work to help optimize leader performance, well-being and well-doing also encourages and potentially strengthens interdisciplinary collaboration. This offers an opportunity for different sciences and related professionals to work collaboratively on enhancing leader effectiveness across situational circumstances and organizational levels. A confluence of disciplines may collaborate to advance the work in this area. In particular, there is a need to have broader interdisciplinary perspectives when helping leaders manage their internal operating system (IOS) as they strive to optimally execute the proffered framework. The various modalities contained in the B.A.S.I.C. profiling process cut across several disciplines. For example, the "S" in B.A.S.I.C. (the bodily sensation mode) is connected to several psycho-physio-social processes which call for professional expertise and perspectives from fields such as psychology,

neuroscience/brain science and medicine (Boyatzis & Jack, 2018; Fava et al., 2023; Pan et al., 2022; Puspa, 2022; Sathian & Lacey, 2022; Zak, 2018). These collaborative efforts may yield additional value-added contributions for leaders striving to enhance their effectiveness in managing their IOS. These efforts may also have implications for helping leaders manage their allostatic load in ways that keep stressors from negatively impacting performance, well-being and well-doing. In turn, this outcome may help insulate key reports and perhaps their significant others from experiencing the negative impacts caused by leaders acting inappropriately in allostatic overload (Yarnell & Grunberg, 2017).

Operationalizing well-being and well-doing provides a unique approach to enhancing leader effectiveness. In the extant literature one does not often find these three constructs integrated into a triadic framework as they are in the current work. Going forward, this can benefit practitioners, applied researchers and those who teach leadership to consider moving beyond focusing on performance alone and looking at leaders' well-being and well-doing from a triadic relationship perspective. Well-doing is a construct that I have operationalized and applied with leaders in their organizations; I have documented some of this work in the context of leader development and enhancing managerial leadership effectiveness (Kerns, 2022a; Kerns, 2023a). Well-doing as offered in the current work draws upon the applied literature on virtuous behavior (Fowers et al., 2020; Kerns, 2023a). This work also connects with the management of core values, including considering virtuous values (Kerns, 2017). Well-doing is centered around leaders acting in ways that benefit others. This approach is in keeping with the emerging work relating to responsible leadership (Kempster et al., 2019; Pless & Maak, 2022). While ethical behavior is not explicitly referenced in the current work it may be implied that well-doing leaders are expected to act ethically. The three components in the proffered framework connect important constructs in a way that offers practical utility for the managerial leader interested in optimizing their current performance while performing in a way that enhances their own and others' well-being and well-doing.

The current framework allows leaders to develop a personalized identity and vision of themselves as an optimal performer who embraces well-being and well-doing. The framework helps leaders internalize and visualize what being an optimal performing well-being well-doing enhancing leader looks like. I have found leaders to resonate with the notion of having a strong and effective identity and a personalized vision of what they would like to become as they develop their leadership capacity as an optimal performing well-being will-doing enhancing leader (Kerns, 2022b). An additional and related benefit of this work is that leaders come to realize that all results are not created equal. They are offered a more holistic approach and perspective in connecting performance, well-being and well-doing. Also, introducing leaders to relational energy management as it relates to positively energizing leadership along with the WWACT leader role in the context of the Leader Performance Well-Being Well-Doing Cycle gives leaders some additional practical tools to help them impactfully execute the framework (Cameron, 2021; Kerns, in press).

A FIVE-STEP APPROACH

Offering added practical utility, the five-step approach is presented as a specific adaptation of the Leader Performance Well-Being Well-Doing Cycle. This leader optimization process, developed in the context of trusted advising/executive coaching, offers a pathway by which organizational leadership may become and/or lead their people to become optimal performers with enhanced well-being and well-doing.

Step 1: Positioning Leader Optimizing Process

The first step in the five-step approach is intended to serve as the “motivating preamble” to launching the leader performance well-being well-doing cycle process. The executive coach orients the leader to this systematic and interactive process. Some of the benefits of this approach are reviewed, and a commitment to using the approach is sought from the participant being coached.

Step 2: Orienting - Assessing

The second step includes orienting the leader to the performance, well-being well-doing optimizing framework as offered in Figure 2. This emphasizes that the three components should be viewed as

foundational, interdependent and synergistic. The importance of collaboratively completing a performance profile on the leader's current position as well as having them consider displaying the WWACT leader role as part of the process, is reviewed (Kerns, in press). Drawing upon appropriate assessment tools, which may include those previously noted in a discussion of the Leader Performance Well-Being Well-Doing Cycle, the executive coach will facilitate the leader in assessing relevant key aspects of performance, well-being and well-doing.

Step 3: Affirming - Integrating - Developing

Once the leader has been oriented and appropriate assessments have been completed, the leader is facilitated in obtaining affirmation on the key aspects of the leader's performance, well-being and well-doing. This process typically includes having the leader consult with other individuals whom the leader trusts to offer accurate, honest feedback. Subsequently, the leader is guided in developing and communicating an integrated performance – well-being – well-doing leader identity statement and vision. Next, the leader is facilitated in identifying specific strengths and developmental opportunities to target relating to the leader's current performance, well-being, well-doing. These areas are then developed into behavior change action plans.

Step 4: Executing - Optimizing

Building upon information gleaned in Steps 1 through 3, the trusted advisor/executive coach engages the leader in actions that help strengthen the leader's performance, well-being, and well-doing identity and related vision. This execution work may include having the leader use the B.A.S.I.C. response modalities to help motivate them to act in alignment with the leader's performance, well-being and well-doing identity and vision. Typically, the B.A.S.I.C. response modalities are used to develop a personalized B.A.S.I.C. Modality Profile, which the leader can use as a motivational tool and as a resource in managing the leader's IOS, especially as it relates to effectively dealing with personal "hot buttons" which can otherwise derail the leader's efforts of effective leadership (Kerns, 2013). Throughout this phase the leader is actively and positively engaged in attending performance huddles, which offer opportunities to receive relevant and timely feedback.

Step 5: Evaluating Impacts - Adapting

This step involves selecting appropriate measurement methodologies to assess performance, well-being and well-doing impacts. These measurement methods may include various rating scales, situational judgment testing strategies, and the application of the linkage research model. During this step, potential feedback-based adaptations are identified to help optimize the leader's behavioral change action plans and/or the leader's approach to executing strategies intended to boost performance, well-being and well-doing practices. The leader's agility tendencies and allostatic load may be assessed or re-assessed as needed and appropriate.

APPLYING THE FIVE-STEP APPROACH – AN EXAMPLE

To illustrate and assist in putting the five-step approach into practice, the following example is offered.³ Michael is the President of a division in a large global organization. He has nine key reports and reports to the CEO for Global Business Operations. In the context of executive coaching, the adaptation/customization of the five-step approach to optimizing leader performance, well-being and well-doing to Michael's role as division President follows. This program was part of a larger executive performance management and leadership development project.

Step 1: Positioning Leader Optimizing Process

The executive coach-oriented Michael to the Five-Step Approach and underscored a number of benefits of this approach offered, including:

- This evidence-based approach highlights the benefits of using a systematic and interactive process to optimize leader effectiveness.
- In connecting performance with well-being and well-doing, leaders are offered a unique perspective, framework and set of practices to further their development and desire to optimize their impact.
- Michael would strengthen his identity as a leader who is committed to optimizing his performance, well-being and well-doing.
- Michael would develop and communicate a motivating vision relating to optimizing performance, well-being and well-doing.
- This approach would help directly drive the desired outcome of increasing the number of people displaying high performance with high well-being and well-doing in the division, starting with the President.
- A more focused approach to tracking accountability and behavioral consistency relating to displaying performance, well doing and well doing at work would be implemented.

After reviewing each of the program steps, Michael was probed for his level of commitment for completing this program. Michael expressed full commitment to conscientiously completing the program. He was especially interested in learning more about how he could put his documented “Identity Statement” as a high performing, well-being and well-doing leader into practice. He was also very interested in exploring how he could be supported in applying this process with his key reports.

Step 2: Orienting - Assessing

The executive coach reviewed the framework with Michael. This review helped Michael better understand how performance can be optimized when connected to practices associated with well-being and well-doing. Examples were offered, showing how performance, well-being and well-doing practices can synergistically come together in a foundational and interdependent process that can drive desired key results. Subsequently, Michael was asked to complete a performance profile/performance-based job description for his current position and indicate the positively energizing factors and stressors associated with performing this role. Michael also completed The Well-Being - Domain Application Matrix, The Wellbeing Finder, The WWACT Practice Profile, The Well-Doing Practice Index and The Burke Learning Agility Inventory/LAI. In consultation with the executive coach, the following six areas were identified as being most relevant to Michael’s optimizing performance, well-being and well-doing program:

- An opportunity to practice being more situationally assertive rather than collaborating with others, especially when there are value misalignments and/or urgent and important decisions needed.
- A need to more explicitly integrate his performance-based position description (performance profile) and those of his key reports with practices associated with well-being and well-doing.
- Being more aware of and effectively managing his IOS as a motivational tool and way of effectively navigating stressful situations.
- More intentionally work to develop a strong and effective identity as a performance, well-being and well-doing oriented leader.
- Asking others for feedback on value-added contributions and overall performance.
- A need to take additional time to reflect on his own performance especially in the context of the performance well-being well-doing key practices-results framework.

Although Michael was confident that he had identified the most relevant areas for developing action plans, he was encouraged to obtain affirmation on these six areas. He was also advised that this feedback process would likely help him gain a more integrated understanding of himself in relation to the optimizing framework.

Step 3: Affirming - Integrating - Developing

To obtain feedback on the areas that Michael believed were most relevant based upon the orienting and assessment work done in Step 2, he was asked to do two things to affirm and perhaps gain an even more complete and integrated understanding of them. First, in consultation with the executive coach, he developed a brief questionnaire containing open-ended questions relating to the six areas identified during Step 2. As appropriate, some questions were accompanied by an excess rating scale (Kaiser & Overfield, 2010) which asked respondents to rate Michael on a relevant behavioral dimension. For example, one question asked respondents to rate Michael's assertiveness. Second, he was asked to identify trusted individuals to complete the questionnaire. Respondents selected included his boss, key reports and peers from other divisions within the organization. The responses from this feedback process were used only as a springboard for conversations between the executive coach and Michael. During this review process it was determined that the feedback received was substantially aligned with the six areas gleaned from work done during Step 2. Michael also reported that this feedback helped him more fully grasp the dynamic relationship between performance, well-being, and well-doing and that this additional understanding would likely assist him in developing useful behavior change action plans.

Having completed the affirming work, Michael, in collaboration with the executive coach identified target areas for learning, growth and development. Each target area was documented in a structured program of actions to bring additional accountability and focus to the optimizing and personal effectiveness learning plans. These plans designed for execution and optimizing during Step 4 included the following actions:

- Developing a brief clear and motivating identity statement relating to how Michael sees himself performing optimally while enhancing well-being and well-doing.
- Operationalize his identity statement by developing B.A.S.I.C. Positivity Profiles, as needed and appropriate.
- Review and ensure alignment between Michael's performance profile / performance-based job description and his reports relating to performance, well-being and well doing. Specify clear measurement metrics and key actions to help guide and drive the achievement of key results.
- Identify the stressors for executing Michael's performance profile/ performance-based job description. Utilize the B.A.S.I.C. response modalities profiling process to manage one's IOS to help prevent and/or attenuate the depleting effects of stress on achieving optimal levels of performance, well-being and well-doing.
- Consider applying the decisive problem-solving framework and related tools to increase the achievement of desired outcomes on key strategic projects. Relatedly, consider being more assertive than collaborative in situations where urgent and important decisions are needed (Kerns, 2016).
- Develop a practical performance huddle program wherein regular feedback can be provided relating to the frequency and impact of value-added contributions and the execution of performance profiles for optimal performance, well-being and well-doing. Set aside specific periods regularly for reflecting on the feedback.

Step 4: Executing - Optimizing

With the information from Steps 1 through 3, the executive coach and Michael engaged in conversations regarding how to prioritize and best approach the formulated action plans while further considering the assessments and feedback previously received from others. In working through this deliberate and collaborative process, the action plans were prioritized and systematically executed with attention given to supporting Michael in optimizing his and others' performance, well-being and well-doing.

A key element in this step centered around Michael executing the clear and motivating identity statement developed during Step 2 relating to optimally performing as a leader having the capacity to enhance his own and others' well-being and well-being. The identity statement that Michael developed in collaboration with the trusted advisor was as follows:

“As a leader I serve as a positive role model for optimal performance well-being and well doing. I recognize the importance of learning from setbacks, savoring successes and working on the most important things that can be influenced while maintaining an optimistic outlook. By striving to optimize my performance, well-being and well doing, I believe others will be encouraged to do the same. Beyond myself, I am committed to helping my reports and others to perform optimally while experiencing optimal levels of well-being and well-doing. My marker for success is having myself and those in my sphere of influence say that they experience optimal levels of performance well-being and well doing both at work and outside of the workplace.”

Michael’s identity work during this step served as a guidepost for executing and optimizing the other action plans. For example, Michael’s identity work was extended to include executing several clear and positively motivating B.A.S.I.C. profiles. These profiles served as motivation for him to see himself in situations where he would be acting in alignment with his optimal performance, well-being and well-doing identity. As part of this work, we regularly reviewed current challenging situations and proactively and intentionally anticipated situations that may challenge him to align with his identity. To further strengthen his identity, Michael worked on seeing his identity being habit-based rather than outcome-based (Clear, 2018; Kerns, 2022b). This habit-based identity helped Michael focus more on who he wanted to become as an optimal performing well-being well doing leader rather than looking at individual achievements in the short run.

This identity work helped to facilitate the execution of other action plans. These efforts focused on areas such as practicing being more selectively assertive, asking for feedback on overall performance and allocating time to reflect on performance feedback relating to becoming an optimal performing, well-being and well-doing leader.

Step 5: Evaluating Key Results/Impacts – Adapting

Several measurement tools were used to evaluate Michael’s impact on performing optimally and in making feedback-based adaptations. For example, several situational judgment tests were applied to determine his effectiveness in executing B.A.S.I.C. Positive Profiles. Michael performed successfully in all of the situational judgement scenarios. Further, it was determined upon reassessment of Michael’s leader learning agility that he should act more quickly on ideas (especially relating to problematic people matters) so that those not working are put aside and other options are moved forward. Also, this reassessment underscored his need to balance his collaborative tendencies with the need to be more assertive in situations requiring urgent decisions. Reassessments of his learning agility also indicated that he needed to slow his pace down to consider his overall impact on enhancing his and others performance, well-being and well-doing.

Michael’s performance profile/performance-based job description was used quarterly to index how he was impacting his and others performance, well-being and well- doing. Reviews and the feedback received from other sources reinforced the need for Michael to consider working on the areas identified in the reassessment of his learning agility as previously noted. However, putting these developmental challenges aside, he consistently executed key action plans that positively impacted his effectiveness in enhancing performance, well-being and well-doing. For example, his score on the well-being factors across domains tool showed consistent improvement. Also, WWACT profiles revealed a consistent pattern of Michael providing value-added contributions in meetings and at strategic project conferences. The pattern of consistent improvement was based on Michael’s self-ratings and those of others who observed him in these situations. Finally, applying the LRM methodology indicated that the areas that Michael influenced showed a positive relationship between the practices at 12:00 and the outcomes at 9:00 relating to performance, well-being and well-doing.

SOME CHALLENGING ISSUES

The work to operationalize and optimize the performance, well-being, and well-doing triad presents some challenging issues. There is a need to offer practitioners additional frameworks and accompanying practical tools to help put these models into practice to help leaders and their organizations realize key results. Practitioners and applied researchers are challenged to develop additional frameworks and tools to help leaders see the dynamic interdependencies as well as synergies between performance, well-being and well-doing. Another closely aligned challenge is helping leaders recognize that performance, well-being and well-doing are both processes to be managed and outcomes to be attained. This requires practitioners to be oriented to this dynamic triadic relationship and guided in understanding how these three components can be operationalized and managed as key interdependent practices which help drive the achievement of key results and desired outcomes. Having leaders move beyond a singular focus on performance will likely contribute to reducing the incidence of bad leadership (Kerns, 2021). Helping leaders gain a perspective that performance can be optimized by executing evidenced-based practices that help enhance well-being and well-doing is not only laudable but makes good business sense.

Further, performance, well-being and well-doing are interdependent key results, with key actions associated with them that can positively and/or negatively impact effectiveness at all organizational levels. Given this, it seems wise for key stakeholders such as executive committees and boards of directors to pay close attention to these three areas as critical key results. In doing so, they should consider leadership and organizational effectiveness as an ethical imperative that can be positively impacted by leaders' performance, well-being and well-doing practices. In light of this, they and other stakeholders are challenged to recognize the importance of holding leaders accountable while encouraging them to assess, optimize and evaluate performance, well-being and well-doing from a synergistic perspective. These actions would underscore and recognize this triadic relationship as a driving force which, when executed in a coordinated and effective way, may contribute to turning around the current global epidemic of bad leadership. Beyond executive committees and boards of directors, individual leaders are challenged to embrace frameworks and tools which help them enhance their own and others performance, well-being and well-doing. Leaders have substantial and consequential impacts on their people and their significant others, further heightening the call for them to answer the challenge to become optimal performing well-being and well-doing managerial leaders (Lin, et al, 2023; Yang, et al., 2018).

The assessment of well-doing, in particular, represents a specific challenge when tracking it as a practice and measuring it as a leadership and organizational key result. More specifically, when measuring leader practice areas associated with well-doing, such as making value-added contributions and being proactive and intentional, it becomes imperative to clearly define these aspects of well-doing in specific behavioral terms. This means having assessors in collaboration with leaders agree upon what does making value-added contributions being proactive and intentional look like in their organization's operating environment. This particular challenge highlights a difference between offering more complex academic-oriented definitions rather than having practitioners in organizations define these areas. Given the emerging interest in wisdom as an important value to be operationalized in organizations, it seems especially important for organizational leaders to spend sufficient time looking at how they can best define well-doing, as part of being wise, in a way that is behavioral and also fits their operating environment (Kerns, 2020a; Lieder et al., 2022). Currently, I am working with leaders and their organizations to assist them in defining what they mean by value-added contributions, and being proactive and intentional. These efforts have produced a variety of practical definitions and ways to observe these practices, especially in meetings and in specific strategic projects. For example, making value-added contributions connects with the WWACT leader role which defines "being wise" as making comments and/or taking actions that contribute to resolving challenges, issues and/or problematic situations. This work is in its infancy and managerial leaders and their organizations are challenged to address this topic and develop behaviorally-based definitions for wise practices. Otherwise, practices defined in vague terms may dilute the reliability and validity of the measurement process while likely reducing the face validity for practitioners and perhaps threatening the construct validity for researchers.

Another challenge involves aligning performance, well-being, and well-doing across organizational levels. This requires leaders and their organizations to define these three interdependent areas in behaviorally oriented terms. Achieving alignment across an organization helps the entity create and sustain a culture characterized by optimal performance, well-being and well doing. Efforts to create a strong and effective culture around these components begin with top management teams. Members of leadership teams must align with the tenants associated with high performance, well-being and well-doing. Having executive committees and leadership teams commit to the value of aligning performance, well-being, and well-doing across an organization will likely increase the chances of this triadic relationship becoming part of their operating environment. Meeting this challenge also allows organizations to strengthen their culture around performance well-being and well-doing. Two important outcomes emerge when considering this triadic relationship as a building block in managing organizational culture. First, it helps hold individual leaders accountable for performance, well-being and well-doing as interdependent processes as well as key foundational results. Second, the work done by individual leaders can be leveraged and contribute to creating and sustaining a strong and effective culture around performance well-being and well doing. In practice these two outcomes can be achieved concurrently (Kerns, 2020b).

Finally, practitioners, applied researchers and those endeavoring to develop leaders are challenged to recognize and appreciate the interdisciplinary nature of the triadic relationship contained in the optimizing framework.

This framework cuts across diverse disciplines and challenges practitioners to broaden their perspectives and employ a more holistic approach when striving to optimize their own and others' performance well-being and well-doing. The current work connects to diverse professional fields of study including neuroscience/brain science, psychology, biology and medicine. In particular, leaders are challenged to understand and appreciate the interdisciplinary nature of the B.A.S.I.C. Modality Profiling Process. This multimodal approach to having leaders diagnose and manage their IOS involves a leader being self and situationally aware of a number of key processes which may not catch their attention in their daily functioning unless they can be more discerning and intentional. Each of the five response modalities connect to diverse behavioral, affective, somatic, imaginary and cognitive domains. Understanding and managing one's basic modalities as key elements in their IOS is essential in effectively managing the many external operating systems that leaders are engaged in daily. In my experience, having leaders increase their self and situational awareness in relationship to managing their B.A.S.I.C. Modality Response Profiles has positively impacted their effectiveness as leaders enhancing their performance, well-being, and well doing (Kerns, in press; Kerns, 2013). This multimodal approach to managing one's IOS can be applied to situations that call for reducing the impact of stressors and in circumstances where additional motivation is needed, such as strengthening one's identity as related to seeing oneself as an optimal performing well-being and well-doing enhancing leader.

SUMMARY STATEMENT

Recognizing and valuing performance, well-being, and well-doing as part of a dynamic triadic relationship sets the stage for practitioners, applied researchers and those interested in leadership development to offer organizational leaders practical approaches to help them assess, optimize and evaluate their impacts on key results and other desired outcomes. Effectively managing performance, well-being and well-doing holistically contributes to enhancing leadership effectiveness in workplace settings. There is a need to offer practitioners additional practice-oriented frameworks and tools to advance the practice of optimizing the three components contained in the triad. As this work moves forward, it will be important to understand that this triadic construct represents practices to be managed and key results to be achieved. It will also be important to highlight the interdependent and synergistic nature of the three components. Leaders can benefit from understanding the notion that optimal performance is tied to well-being and well-doing. Further, assessing well-doing has proven challenging in organizational settings, particularly regarding indexing leader value-added contributions. As this work unfolds, useful assessment tools will be needed to link, for example, measures of wisdom with well-doing practices. Efforts to align performance,

well-being and well-doing across organizational levels need to advance as it holds special promise in having these three components become building blocks to strengthen and sustain organizational cultures (Kerns, 2020b). Viewing these components as building blocks in helping to manage organizational culture is exciting and challenging and will require careful attention to organizational alignments throughout an organization's structure. The prospect of further exploration and study of this triadic construct by interdisciplinary teams promises to contribute to our understanding and application of performance, well-being and well-doing in workplace settings. These efforts will likely assist leaders and their people in advancing toward realizing optimal levels of performance, well-being and well-doing.

ENDNOTES

1. A debate comparing and contrasting management and leadership has taken place over the past several decades. In this article the terms managerial leadership, management, leadership, leaders and managers are used synonymously.
2. This system of managerial leadership endeavors to provide practitioners, applied researchers and teachers with an integrated approach to viewing and understanding leadership. The system brings together several streams of leadership study including empirical, conceptual and applied research that has been offered over the past century. As part of this system performance, well-being and well-doing are studied in applied settings as both key results and practices for enhancing leadership effectiveness which is the focus of the current article. It is beyond the scope of the current presentation to review and discuss the other dimensions found in this holistic system of managerial leadership.
3. This example is drawn from my work as a trusted advisor with an executive. For confidentiality purposes, identifying information has been changed.

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