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**| RESEARCH ARTICLE**

**Retaining Values and Interchanging Values within Organizational Contexts**

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**| ABSTRACT**

This literature review examines two concepts: 'retaining values' versus 'interchanging values', and their impact on organizational dynamics. Retaining values are the non-negotiable principles fundamental to individual identity, while interchanging values can be adapted for harmony and respect in diverse settings. 'Retaining values' can include standards such as honesty or fairness that individuals in an organization uphold at all times. 'Interchanging values' refer to the cultural adaptation necessary to work with people from diverse backgrounds. The concepts are assessed across three contextual situations: organizational changes and leadership transitions, international business interactions, and scenarios challenging cultural and religious norms. This review addresses the recurring importance of values clarification for individuals in complex organizational contexts, cross-cultural interactions, and potential conflicts between personal and professional value systems in today's globalized business environment. To explore 'retaining values' and 'interchanging values' a literature review and analysis were conducted. Over 30 peer-reviewed articles from reputable scholarly databases, spanning organizational behavior, cross-cultural management, and ethical decision-making, were accessed. The analysis focused on identifying key themes, emerging concepts, theoretical frameworks, and empirical findings related to value dynamics in contexts such as organizational change, international business, as well as cultural and religious norms. This synthesis also informed the development of the proposed 'values verification approach'. The findings show that retaining values are critical for maintaining professionals' psychological stability and resilience, even in unfamiliar or challenging environments. Leaders who remain committed to foundational values, such as fairness, integrity, and respect, are considered more trustworthy, particularly during transitions. Similarly, managers who embody empathy, transparency, and accountability build team loyalty, especially in high-pressure environments like crisis management. Studies by Mokline and Ben Abdallah (2021) and Guillemin and Nicholas (2022) support this postulation by arguing that value retention correlates with higher employee commitment and leadership credibility. 'Interchanging values' are equally important as they enable cooperation and adaptability in diverse environments. The contemporary organizational environment has people from diverse backgrounds and differing cultural views. Individuals who wish to succeed in this area must, therefore, be willing to embrace different values and norms. Lipscomb (2024) and Saaida (2023) highlight how individuals who distinguish between core and peripheral values are better equipped to promote collaboration without compromising identity. For example, professionals working internationally must adapt to foreign norms yet retain essential ethical standards. The results suggest that an intentional approach to values clarification enhances personal integrity and interpersonal harmony. In other words, identifying which values are core and which are negotiable is necessary for psychological and professional satisfaction. The findings have far-reaching implications for leadership training and professional development. Change management is challenging for organizations, regardless of size and specialization. Delineating values before embarking on change can eliminate unforeseen problems and allow firms to undergo the change process successfully. Organizations can also benefit from integrating value-based assessments into hiring decisions to ensure alignment with organizational culture and global expectations. Future research should explore actionable pathways for implementing values clarification in professional settings.

## KEYWORDS

Retaining values, interchanging values, cultural adaptation, values verification approach, psychological stability

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## Introduction

Values clarification has become increasingly important in today's globalized business environment, where individuals must navigate complex organizational changes, cross-cultural interactions, and potential conflicts between personal and professional value systems. This literature review examines 'retaining values' versus 'interchanging values'. 'Retaining values' are those principles that remain non-negotiable and fundamental to an individual's identity (Nicolaidis, 2024; Zalzburg, 2023), while 'interchanging values' can be compromised for the sake of achieving harmony and respect for differences (Lipscomb, 2024). These concepts are assessed across three critical contextual situations: organizational changes and leadership transitions, international business interactions, and scenarios challenging cultural and religious norms. Drawing from extensive research in organizational behavior, cross-cultural management, and ethical decision-making, this review synthesizes evidence-based approaches to value clarification while providing practical frameworks for maintaining harmony amid diversity. It also proposes a structured approach to values clarification, aiming to achieve harmony and respect despite differences, and highlights potential risks and precautions for effective implementation.

## Retaining Values: The Foundation of Personal and Professional Identity

'Retaining values' are deeply ingrained principles that define an individual's personal or professional identity. They denote the core principles that individuals consider non-negotiable, forming the bedrock of their identity. These values are often rooted in core beliefs, ethics, and experiences, making them resistant to change despite external pressures (Zalzburg, 2023). Retaining values are deeply ingrained in people, serving as their moral compass, guiding behavior, and decision-making. Thus, individuals who retain their core values experience greater psychological stability and resilience, even in unfamiliar or challenging environments. Mokline and Ben Abdallah (2021), Rizzi et al. (2023), and Wu et al. (2024) clearly highlight this in their work.

For instance, a study on core values at work emphasized that when individuals uphold their fundamental beliefs, they experience greater commitment and dignity in their roles (Guillemin & Nicholas, 2022). In leadership contexts, adhering to core values also fosters trust and credibility. Leaders who remain steadfast in their principles, even amidst organizational changes, are perceived as authentic, which enhances their influence and effectiveness (Chen & Sriphon, 2021). This authenticity is vital in building cohesive teams and promoting a positive organizational culture. A leader who consistently upholds values such as fairness and accountability is more likely to gain the trust of their team, even in culturally diverse settings (Jerab & Mabrouk, 2023). This is because 'retaining values' are tied to an individual's sense of self and moral compass, making them non-negotiable in most circumstances.

In international settings, 'retaining values' become even more critical. A study by Saaida (2023) indicates that individuals working across cultures often face value conflicts. However, those who retain their core values are better equipped to navigate these challenges without compromising their identity. Caligiuri and Tarique (2016) emphasize that while cultural agility is important, it should not come at the expense of one's core ethical standards. Professionals who maintain their fundamental values are better equipped to navigate ethical dilemmas in diverse cultural contexts. Thus, holding onto essential values can provide a moral compass, guiding individuals through unfamiliar cultural landscapes in cross-cultural settings. Similarly, when interacting across religious or societal norms, 'retaining values', such as respect for human dignity or equality, can help individuals maintain their ethical stance while engaging with diverse perspectives.

For instance, in nursing, a solid professional identity is linked to adherence to core values such as integrity, compassion, and commitment to patient care despite leadership changes. This linkage is asserted by Kristoffersen (2021) who illustrates that aspects of professional identity such as acting as a professional contributor and maintaining professional belongingness are significant factors in nurses choosing to remain in the profession. Hampton et al. (2022) further reinforce that retaining professional values considered core values, is crucial for professional development and identity formation. Therefore, the importance of 'retaining

values' is not about rigidity but about preserving principles that define who people are at an individual or professional level, ensuring consistency and authenticity in diverse situations.

### **Interchanging Values: The Art of Flexible Adaptation**

Whereas some values are foundational, others may be more adaptable, allowing compromise to achieve mutual understanding. 'Interchanging values' involves negotiating these adaptable principles to foster collaboration and harmony. It involves a strategic exchange of less critical principles to achieve a greater good, such as promoting teamwork or resolving conflicts. Hence, this concept is particularly relevant in contexts where cooperation and negotiation are essential. In cross-cultural settings, flexibility in non-core values is important, as cross-cultural communication necessitates a degree of value trading to bridge differences. A study by Zhang (2023) emphasized the importance of effective communication techniques in complex organizations. This study suggests that adapting some values enhances communication efficacy. Ketemaw et al. (2024) also highlighted that effective multicultural collaboration often requires individuals to adjust certain values to align with diverse team dynamics.

Adapting to different cultural norms without compromising core values is also crucial in international organizations. This adaptability, termed cultural agility, enables professionals to navigate complex cultural landscapes effectively. Radu (2023) underscores that culturally agile individuals can modify their behaviors and expectations, facilitating better cultural interactions. Besides, the ability to trade some values is essential for effective cross-cultural communication. Setti et al. (2020) found that expatriates who adapted their communication styles and social norms to align with host cultures successfully built relationships and achieved professional objectives. This adaptability is crucial for building rapport and establishing trust in new environments. It often necessitates reassessing and adjusting non-core values to respect cultural differences and foster collaboration. Besides communication, 'interchanging values' such as punctuality or decision-making styles help bridge cultural gaps and enhance collaboration.

This concept is supported by research on cultural adaptability and flexibility. According to Sagiv & Schwartz (2022), individuals open to modifying peripheral values in response to new organizational cultures experience more positive reactions to change. Flexibility in values encourages smoother integration, especially during leadership transitions. Hubbart's (2024) article on organizational change discusses the implications of directive change management, emphasizing the need for balancing top-down leadership with employee involvement to ensure successful change initiatives. When confronting societal or familial norms, 'interchanging values' increases acceptance and reduces conflict. It also promotes understanding and tolerance. Individuals might participate in cultural rituals or traditions that differ from their beliefs as a gesture of respect and goodwill. However, it is important to note that 'interchanging values' should not compromise ethical or moral principles, as this can lead to internal conflict and diminished self-respect. Therefore, value flexibility enhances engagement and collaboration (Ketemaw et al., 2024). Although 'retaining values' provides stability and identity, 'interchanging values' enable flexibility and adaptability, both of which are essential for achieving harmony in diverse contexts.

For example, when moving to an international organization, adapting to local business etiquette or communication styles demonstrates cultural sensitivity and fosters mutual respect. Professionals who exhibit flexibility in their values are more effective in cross-cultural negotiations, as they can find common ground without undermining their core principles (Chiu-Shee & Shi, 2024). Besides, interchanging values like dietary preferences or dress codes facilitate inclusivity and reduce conflict in situations challenging religious or societal norms. However, this flexibility must be balanced with discernment; as Ozer and Obaidi (2022) note, excessive compromise can lead to value erosion and identity loss. Thus, interchanging values should be approached strategically, ensuring that adaptations align with the broader goal of fostering harmony while respecting differences.

### **Values Verification Approach**

An evidence-based Values Verification Framework supports individuals in distinguishing between retained and interchangeable values while promoting harmonious interactions. Structured values assessment enables professionals to successfully navigate major organizational and cultural transitions while maintaining personal authenticity. This three-phase approach provides a practical methodology for values verification across diverse contexts. The framework begins with Values Mapping – identifying and categorizing core versus adaptable values through reflective assessment tools. Professionals using structured values mapping experience higher rates of successful adaptation during international relocations while preserving critical values.

The second phase involves Context Analysis – evaluating specific organizational, cultural, or community environments to identify potential value conflicts, with research by Baharum et al. (2023) demonstrating that proactive values conflict assessment reduces transition stress. The final phase, Strategic Values Integration, utilizes regular values verification check-ins and adaptive strategies. Individuals who engage in quarterly values verification practices report higher success in navigating value-challenging situations while maintaining personal authenticity. Crucially, this framework emphasizes continuous reassessment rather than one-time

analysis—values verification represents an ongoing process that evolves with changing contexts and personal growth, enabling both stability through retained values and flexibility through interchangeable ones. Typically, it may entail:

- i. **Self-Reflection and Identification of Core Values:** Begin by identifying your core values through self-reflection. Tools such as Schwartz's Value Survey have been found to help individuals prioritize their values based on personal and professional significance (Maslova et al., 2020; Witte et al., 2020). Reflect on which values are non-negotiable and define your identity, and which are more flexible.
- ii. **Contextual Analysis:** Assess the specific context in which value clarification is needed. For example, consider the organizational culture, leadership style, and team dynamics in a new organization. Analyze cultural norms, communication styles, and business practices in international settings. When facing religious or societal conflicts, evaluate the underlying beliefs and traditions involved. A study by Caligiuri et al. (2022) emphasizes the importance of understanding the cultural and organizational context to navigate value conflicts effectively.
- iii. **Categorization of Values:** Classify your values into holding and trading categories. 'Retaining values' should include those that are non-negotiable and fundamental to your identity, while 'interchanging values' should encompass those that can be adapted or compromised without significant personal or ethical consequences. For instance, an individual might categorize teamwork and adaptability as "interchanging values," as these can be adjusted to fit different organizational or cultural contexts and categorize integrity as a "retaining value".
- iv. **Engage in Dialogue and Negotiation:** In situations involving diverse perspectives, engage in open and respectful dialogue. Communicate your 'retaining values' while remaining open to negotiating 'interchanging values' (Gustafson et al., 2022). For example, discuss how different values can coexist in a multicultural team and contribute to shared goals. This step requires active listening, empathy, and willingness to find common ground.
- v. **Evaluate Outcomes and Adjust:** After implementing the values clarification process, evaluate the outcomes. Reflect on whether the balance between holding and interchanging values has achieved the desired harmony and respect. If necessary, adjust your approach to better align with the context and relationships involved. For example, if a particular "interchanging value" is causing internal conflict, consider whether it can be modified or replaced with an alternative approach.
- vi. **Seek Feedback and Support:** Engage with mentors, peers, or cultural advisors to gain insights and feedback on your values clarification process. This step is particularly important in international or culturally diverse settings, where external perspectives can enhance understanding and effectiveness (Carden et al., 2021). For instance, a mentor might provide guidance on how to navigate cultural differences without compromising core values.

## Values Verification Approach

### Organizational Context

Organizations constantly face pressures to adapt to changing environments, technological innovations, and evolving stakeholder expectations. These adaptations frequently trigger values verification processes that impact heterogeneous and homogeneous workforces in complex ways. Values verification is the critical reassessment and realignment of personal and professional values in response to organizational changes (Pfund et al., 2021). This process requires employees to examine which values they will retain, modify, or potentially abandon. While often associated with global or heterogeneous workforces, value verification is equally relevant in homogeneous settings, where internal dynamics such as national reforms or organizational restructuring necessitate a re-evaluation of shared values. This review synthesizes recent research on values verification approaches within organizations experiencing change, transition, or transformation, with particular attention to how these processes manifest in both heterogeneous and homogeneous workforce compositions.

### What are Heterogeneous and Homogeneous Workforces?

Workforce composition (heterogeneous or homogeneous) significantly influences how value verification unfolds during organizational change. Seidemann and Weißmüller (2022) note that the terms "diversity" and "heterogeneous" are often used interchangeably, and as such, they define a heterogeneous workforce as comprising individuals from diverse cultural, ethnic, and professional backgrounds. Varying values, beliefs, and practices characterize this workforce. Although heterogeneity fosters innovation and creativity, it may lead to value conflicts. In contrast, a homogeneous workforce consists of individuals with similar cultural, ethnic, or professional attributes, often sharing common values and norms (Seidemann & Weißmüller, 2022). These authors highlight that homogeneity is the defective state of any organization's workforce.

Unlike heterogeneity, homogeneity promotes cohesion while risking stagnation. Olabiyi (2023) asserts that a homogeneous workforce limits ideas and strategies applicable to problem-solving and drives innovation, encouraging stagnation. These studies highlight that both workforces face challenges during organizational change, necessitating values verification to align individual and organizational goals. However, compared to a homogeneous workforce, a heterogeneous workforce requires more complex verification approaches as it brings together people from different backgrounds with varying value systems. Therefore, in heterogeneous teams, values verification helps bridge cultural gaps, while in homogeneous teams, it ensures that shared values evolve in response to new organizational realities.

### **Values Verification during Organizational Change**

Whether driven by national reforms, leadership transitions, or strategic shifts, organizational change often disrupts established norms and values. Hence, this change necessitates a values verification process. Employees must reconcile their personal values with the evolving organizational culture during such periods. Research by Berglund and Ekelius (2024) indicates that values verification helps employees navigate uncertainty and maintain engagement, particularly in homogeneous workforces where shared values may be deeply ingrained. For example, when a company undergoes a leadership change, employees may need to verify whether the new leader's values align with their own. Similarly, national reforms, such as sustainability mandates, may require organizations to integrate new values into their culture (Assoratgoon & Kantabutra, 2023; Hariram et al., 2022). Hence, this suggests that value verification is a stabilizing force during organizational change.

### **Values Verification in Organizational Transition**

Organizational transition denotes the moving from one state to another. This movement involves shifts in vision, mission, or operational strategies. During transitions, values verification ensures that employees' values align with the new direction, fostering a sense of purpose and commitment (Tourky et al., 2023). This process involves addressing cultural differences and ensuring inclusivity in heterogeneous workforces, while in homogeneous workforces, it focuses on reinforcing shared values. A study by Seidemann and Weißmüller (2022) highlights that values verification during transitions enhances trust and collaboration in diverse teams. For instance, when an organization expands internationally, employees must verify how their values align with the new cultural context. Similarly, in homogeneous teams, transitions such as digital transformation require employees to adapt their values to embrace innovation.

### **Values Verification in Organizational Transformation**

Organizational transformation involves fundamental changes to an organization's structure, culture, or strategy. This move is often driven by external pressures such as technological advancements or market shifts. Values verification helps employees reconcile their personal values with the new organizational identity during transformation. Fodor et al. (2022) suggest that values verification is particularly critical in homogeneous workforces, where resistance to change may be higher due to entrenched norms. For example, when a traditional company adopts a sustainability-focused strategy, employees must verify how their values align with this new direction. In heterogeneous workforces, values verification fosters inclusivity by ensuring that diverse perspectives are respected and integrated. Organizations that prioritize values verification during transformation initiatives achieve higher levels of employee engagement and innovation. Thus, values verification drives successful organizational transformation.

### **The Role of Leadership in Values Verification**

Leadership facilitates values verification during organizational change, transition, or transformation. Leaders must model the desired values and create opportunities for employees to engage in values verification. Leaders in heterogeneous workforces must demonstrate cultural competence and inclusivity, while in homogeneous workforces, they must challenge existing norms and encourage adaptability. Research by Carvajal et al. (2023) emphasizes that leaders prioritizing values verification foster trust and alignment among employees. For instance, during a leadership transition, the new leader's ability to articulate and embody shared values is critical for gaining employee buy-in. Likewise, in the context of national reforms, leaders must ensure that organizational values align with broader societal changes.

### **Values Verification in Homogeneous Workforces**

Values verification in homogeneous workforces often reinforces shared values while adapting to new organizational realities. During periods of change, employees in homogeneous teams may resist altering their deeply ingrained values, making values verification a delicate process. Thus, it requires clear communication and inclusive decision-making. For example, when a company undergoes digital transformation, employees must verify how their traditional values align with the need for innovation. Simultaneously, recent research challenges traditional assumptions about value verification in homogeneous workforces, revealing more complex dynamics than previously recognized. While some corporations are widely considered to have highly homogeneous workforces, their organizational changes consistently reveal "latent values heterogeneity" masked by conformity pressures and

cultural norms (Constantino et al., 2022). During significant organizational changes, employees in homogeneous organizations demonstrate value variance comparable to moderately heterogeneous workforces, especially regarding risk tolerance, work-life balance, and reward preferences.

### **Values Verification in Heterogeneous Workforces**

Organizations with clearly heterogeneous workforces typically employ distinctive approaches to value verification during organizational change. Values verification in heterogeneous workforces is essential for bridging cultural differences and fostering inclusivity. Employees from diverse backgrounds may have conflicting values during organizational change, necessitating a structured values verification process (Leal-Rodríguez et al., 2023). Values verification in heterogeneous teams enhances collaboration and innovation by respecting diverse perspectives. According to Canzio et al. (2022), organizations that prioritize values verification in diverse teams achieve higher levels of employee satisfaction and retention. Hence, when an organization expands into new markets, employees must verify how their values align with the cultural context of the new region to ensure inclusivity and cohesion in the workforce. Values verification in heterogeneous contexts requires intentional, multifaceted approaches that acknowledge and leverage value diversity while establishing sufficient alignment to maintain organizational coherence during periods of significant change.

### **Strategies for Effective Values Verification**

Organizations must adopt strategic approaches tailored to their workforce composition to overcome challenges and ensure successful values verification. Cultural training and inclusive decision-making are essential for fostering alignment in heterogeneous workforces. Conversely, clear communication and participatory leadership help reinforce shared values while encouraging adaptability in homogeneous workforces. Values verification should be ongoing and integrated into organizational culture and practices. For example, during organizational transformation, regular values assessments and feedback sessions can help employees align their values with the new direction.

### **The Future of Values Verification Research and Practice**

The emerging research on values verification indicates several promising directions for scholarship and organizational practice. Technology-enabled verification approaches are increasingly important. AI-facilitated value mapping is anticipated to achieve greater value clarity than traditional methods. As organizations become more complex and distributed, technological facilitation may become essential for effective verification regardless of apparent workforce homogeneity. Additionally, values verification is evolving from episodic intervention to a continuous process. This approach would increase resilience during unexpected disruptions compared to treating verification as a one-time event. Also, values verification increasingly functions as a strategic capability rather than a change management tool. Organizations with mature verification capabilities achieved higher performance. These emerging directions suggest that values verification is evolving into a core organizational competency that requires sophisticated approaches regardless of workforce composition. Successful organizations treat verification as a continuous, technology-enabled strategic process rather than a reactive intervention during disruption.

### **Risk Factors and Precautions**

While the values clarification process is beneficial, it is not without risks. One major precaution is the potential for internal conflict when “interchanging values”. Individuals may experience cognitive dissonance or emotional distress when compromising values closely tied to their identity (Hillman et al., 2022). Thus, clearly defining and prioritizing ‘retaining values’ is essential, ensuring that ‘interchanging values’ do not undermine personal integrity to mitigate this risk. Another risk is the misinterpretation of values in cross-cultural interactions. For example, a gesture of respect in one culture may be perceived differently in another, leading to misunderstandings. To address this, individuals should invest time in learning about the cultural norms and values of others, fostering mutual understanding and respect. There is also the risk of over-compromising, where individuals trade too many values to achieve harmony (Wen et al., 2024). This compromise can result in a loss of authenticity and self-respect. Hence, individuals should regularly reflect on their values and ensure their actions align with their core principles to eliminate this risk. For example, suppose a professional consistently compromises their values to fit into a new organizational culture. In that case, they may need to reassess whether the environment truly aligns with their long-term goals and identity. Holding onto some values may also cause conflict or resistance from others. Thus, it is important to develop strategies for managing disagreements constructively. “Trading values” in certain situations might lead to ethical conflicts, necessitating a clear ethical framework to guide decision-making.

### **Conclusion**

Values clarification is a dynamic and essential process for navigating complex personal and professional landscapes. Distinguishing between holding ‘retaining values’ and ‘interchanging values’ allows people to maintain their core identity while fostering harmony and respect in diverse contexts. Whether in heterogeneous or homogeneous workforces, values verification ensures alignment



and cohesion during change, transition, or transformation periods. Retaining core values while adapting to new realities enables organizations to foster resilience, engagement, and innovation. Recent research shows that values verification is not limited to global or diverse settings but is an intrinsic dynamic within organizational culture. Organizations can navigate complex challenges and achieve sustainable success by prioritizing values verification. This review underscores the importance of values verification as a foundational process for organizational adaptability and growth. However, it is crucial to approach this process with caution, recognizing the potential risks and taking proactive measures to safeguard personal integrity. Therefore, values clarification is not about abandoning one's principles but finding a balance that enables meaningful connections and collaborative success.

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