

# When Is Proactivity Wise? A Review of Factors That Influence the Individual Outcomes of Proactive Behavior

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## Abstract

There is solid evidence that proactivity, defined as self-initiated and future-focused action to change oneself or the situation, can positively benefit individuals and organizations. However, this way of behaving can sometimes be ineffective or have negative consequences. We seek to understand what factors shape the effect of proactivity on individual-level outcomes. On the basis of a review of 95 articles, we identify three categories of factors that mitigate or exacerbate the effectiveness of proactive behavior: task and strategic considerations (e.g., situational judgment), social and relational considerations (e.g., having an open leader), and self-regulatory considerations (e.g., learning orientation). We then extrapolate from this review, and draw on psychological theories of wisdom, to suggest that individuals can be more or less “wise” in the proactive goals they set, and in how they pursue those goals. In closing, we identify further research directions that flow from the notion of wise proactivity.

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## INTRODUCTION

The dynamic nature of contemporary organizations has resulted in scholars and practitioners alike arguing for the importance of proactive behavior in the workplace, or behavior that is self-starting, future focused, and change oriented (Parker et al. 2006). One can be proactive across many different domains, such as improving local work processes [e.g., taking charge (Morrison & Phelps 1999), voice (Morrison 2011), personal initiative (Frese & Fay 2001)], actively seeking feedback [proactive feedback seeking (Anseel et al. 2015, Ashford et al. 2003)], the deliberate sculpting of one's career [e.g., career initiative (Seibert et al. 2001)], changing one's job [job crafting (e.g., Tims et al. 2012, Wrzesniewski & Dutton 2001)], preventing the occurrence of problems [problem prevention (e.g., Parker & Collins 2010), and entering into a new work situation [proactive socialization (e.g., Saks & Ashforth 1996)]. All of these forms of proactivity have in common that they are self-initiated rather than involve adherence to prescriptions, they involve causing change to oneself or the situation instead of accommodating change or maintaining the status quo (even if that change involves taking steps to prevent a negative change), and they are future focused rather than reactive (Parker et al. 2010). It is these elements that define these behaviors as proactive because they all involve the individual actively taking control and "making things happen."

Although there is considerable evidence of the positive effects of various forms of proactivity for outcomes such as work performance and career success (for meta-analyses, see, e.g., Fuller & Marler 2009, Thomas et al. 2010, Tornau & Frese 2013), a growing body of evidence highlights that proactivity is not always positive. For example, Grant et al. (2009) showed that when individuals lack prosocial values, their proactive behavior fails to contribute to supervisors' judgments of their job performance. Capturing such instances, Campbell (2000) discussed the idea of an "initiative paradox" in which proactivity is desired, but only to the extent that it conforms to the leader's expectations. Similarly, in discussing its dark side, Bolino et al. (2010) argued that expecting employees to be proactive can cause employee stress, increase tensions between employees who are proactive and those who are not, and reduce organizational learning. Thus, evidence is emerging that suggests proactivity does not always have benefits.

In this article, our goal is to understand when proactivity is effective and when it is not. First, we review the literature on the factors that moderate the effect of individual-level proactivity on outcomes that are organizationally oriented (e.g., job performance) and personally oriented (e.g., well-being and career success). We also include other literature that is informative with respect to the effectiveness of proactivity, such as studies that investigate the different consequences of distinct forms of proactivity. We synthesize this literature into three key categories of factors that mitigate the outcomes of proactivity. Second, we draw on this literature to suggest "how" individuals can be proactive in an effective way. At the same time, we draw on wider research about individual behavior, notably wisdom theories, to suggest that individuals can be more or less "wise" in the proactive goals they set, and in how they pursue those goals. We offer this new perspective on wise proactivity to guide further research on how one can be proactive effectively.

Our review and proposed notion of wise proactivity contributes to the literature in three ways. First, reviews or meta-analyses have not systematically considered when proactivity has positive versus negative effects. Instead the key focus has been on main effects of proactivity on outcomes. The only exceptions to this are Fuller & Marler (2009), who reviewed the role of research design as a moderator, and two meta-analyses that compared the effects of different forms of voice and crafting (Chamberlin et al. 2017, Rudolph et al. 2017). At the same time, reviews and meta-analyses conclude that more research is required to understand the moderators of proactivity-outcome relationships (e.g., Alarcon et al. 2009, Rauch & Frese 2007, Thomas et al. 2010, Tornau & Frese 2013). Altogether, there is a strong case for this review.

Second, our review is comprehensive: We consider multiple forms of proactive behavior. As Grant & Ashford (2008), as well as Parker et al. (2010), have argued, and scholars have shown empirically (Parker & Collins 2010, Tornau & Frese 2013), there is considerable conceptual and empirical overlap among proactive behaviors such as voice, taking charge, and individual-level innovation, among others, with similar underpinning processes. We seek to draw conclusions across these highly related proactive concepts. We also highlight—where relevant—differences according to these forms in the moderators of outcomes.

Third, we go beyond the review of moderators of proactivity–outcome links to suggest “how” individuals can be proactive in a way that enhances the likelihood of effective outcomes. We propose an integrating perspective of wise proactivity that synthesizes the disparate factors that have been identified as moderators of the proactivity–outcome relationships, and that embeds these factors in a broader theoretical perspective.

## **FACTORS THAT INFLUENCE THE EFFECTS OF PROACTIVITY: A REVIEW OF EVIDENCE**

We sought to identify all published research that has examined factors that moderate, or influence in some other way, the outcomes of individual-level proactivity. We include in this review proactivity both considered as a disposition (that is, proactive personality; Bateman & Crant 1993) and as a more malleable behavior that occurs across multiple domains. We conducted a systematic literature search by applying relevant search terms within the Web of Science database. We restricted our search to top-tier journals in organizational behavior/psychology and management to ensure the inclusion of only high-quality research, with leading journals from non-US regions also explicitly included. A full list of the search terms and the journals included in the search is provided in **Supplemental Appendix 1**. In June 2018, we conducted a search, which identified 1,339 articles. We reviewed each article and selected only those that are directly relevant for proactivity research in the organizational behavior and management literature, and that either discussed the “how” of proactivity or different forms of proactivity, or directly studied the moderators of the relationship between individual-level proactivity and outcomes. This process led to most of the articles being screened out, such as industrial relations articles on voice because they focused on voice as a work practice not an individual behavior; articles that discussed proactivity at a team or organizational level rather than at an individual level; articles that were not situated in the work context (e.g., environmental proactivity); and articles in which proactivity was an outcome or itself was a moderator. Beyond this literature search, we obtained recently accepted articles from researchers in our network, including a recent special issue in the *Journal of Organizational Behavior* dedicated to proactivity. The final list that formed the basis of our review was 95 published articles.

Through careful analysis of these articles, we identified three broad categories of factors that mitigate or exacerbate the effectiveness of proactivity: task and strategic considerations, social and relational considerations, and self-regulatory considerations. **Table 1** presents a summary of these categories, with example factors subsumed under each category. We also provide more detailed tables of studies in each category, as well as studies that consider factors across multiple categories and studies that investigated factors that did not fit into any of these main categories. These details are presented in **Supplemental Appendix 2**. We discuss each category of factors in turn.

### **Task and Strategic Considerations**

First, proactivity involves initiating change within a particular task and strategic context, which raises an initial question as to whether the proactivity is suited to that situation. For example, is

**Supplemental Material** >

**Table 1** Three categories of factors that influence the effect of proactivity on outcomes with example evidence from studies of different forms of proactivity, aspects of the proactive person, aspects of the situation, and person and situation interactions

Categories of factors			
	Task and strategic considerations	Social and relational considerations	Self-regulatory considerations
<b>Different forms of proactivity</b>	Not applicable	Some forms of proactivity have more positive implications for social and relational aspects: <ul style="list-style-type: none"> <li>■ Less challenging forms, more supportive forms</li> <li>■ Collective/team-oriented versus self-focused forms</li> <li>■ Social comparison elicited by i-deals as a unique form</li> </ul>	Some forms of proactivity more positively affect self-regulation. Some forms of proactivity enhance learning and development more than others.
<b>Aspects of the proactive person</b>	Aspects of the person that enable him/her to navigate the task and strategic context in which the proactivity is being implemented: <ul style="list-style-type: none"> <li>■ Situational judgment</li> <li>■ Political skills</li> <li>■ Contextual knowledge</li> <li>■ Expertise</li> </ul>	Aspects of the person that enable him/her to navigate the social and relational context: <ul style="list-style-type: none"> <li>■ Interpersonal skills</li> <li>■ Relational knowledge</li> <li>■ Prosocial motivation and behavior</li> <li>■ Status and credibility</li> </ul>	Aspects of the person that enable him/her to self-regulate during proactivity: <ul style="list-style-type: none"> <li>■ Positive self-views</li> <li>■ Autonomous motivation</li> <li>■ Lower image enhancement motives</li> <li>■ Sensitivity to reward rather than punishment</li> <li>■ Work centrality</li> <li>■ Learning from past experiences</li> </ul>
<b>Aspects of the situation</b>	Aspects of the situation that cue, foster, or allow proactivity appropriate to the task/strategy: <ul style="list-style-type: none"> <li>■ Situational strength, e.g., job autonomy, contexts with less structured guidelines</li> <li>■ Contexts conducive to proactivity, e.g., team proactivity</li> </ul>	Aspects of the situation that positively shape the social and relational dynamics: <ul style="list-style-type: none"> <li>■ Supervisors' lack of dominance, openness to suggestions, open and positive values/motives, and self-efficacy</li> <li>■ Climate conducive to positive social exchange (e.g., justice climate)</li> </ul>	Aspects of the situation that positively shape self-regulation: <ul style="list-style-type: none"> <li>■ Manager's mind-set (incremental rather than fixed)</li> <li>■ Situational learning orientation, organization's innovation climate</li> <li>■ Hindrance stressors versus challenge stressors</li> <li>■ Perceived organization support</li> </ul>
<b>How the person and situation interact</b>	Person and situation interactions that positively shape the fit of proactivity with the tasks/strategy: <ul style="list-style-type: none"> <li>■ Aligned proactivity as a result of person-organization fit/person-job fit</li> <li>■ Proactivity routines for standardized, collective contexts</li> <li>■ Collective proactivity in collective contexts</li> </ul>	Person and situation interactions that positively shape social and relational considerations: <ul style="list-style-type: none"> <li>■ Engage in proactivity in a way that is other oriented and that protects ego for certain leaders</li> <li>■ Personality "fit" between employees and supervisors</li> <li>■ Relationship quality as the fit between the person and the leader (e.g., leader-member exchange)</li> </ul>	Not applicable

proactivity an appropriate response given the particular tasks that individuals are expected to carry out, or given the company's strategic goals? Three main types of evidence point to the importance of ensuring that the proactivity fits the task and strategic environment: (a) studies that focus on aspects of the proactive person; (b) studies that focus on aspects of the situation; and (c) studies that focus on the interaction between, or the fit of, the person and the situation. We discuss each evidence base in turn, and the full list of studies in this category is presented in **Supplemental Appendix 2, Table A**.

**Studies that focus on aspects of the proactive person.** Several studies focus on aspects of the proactive person that enable an individual to navigate the task and strategic context. In one of the most well-known studies, Chan (2006) found that proactive personality led to positive work-related perceptions and outcomes only when individuals had high situational judgment, which was assessed using employees' responses to job-relevant work scenarios. When individuals' situational judgment was low, their proactive personality was detrimental to work outcomes because the proactivity was not pursued realistically or effectively with respect to situational demands. In a similar vein, Sun & van Emmerik (2015) showed that employees' political skills moderated the link between proactive personality and various performance outcomes. They suggested that political skills enable employees to effectively understand situations in the organization, thereby utilizing their proactivity to engage in efforts that address organizational needs.

Focusing on job crafting, Bizzi (2017) suggested that possessing rich contextual information is a critical moderating factor because, without such knowledge, individuals' job crafting can be at odds with the organization's goals. Using individuals' central position in the organization's social network as a measure of their accessibility to contextual information, Bizzi indeed found that job crafting affected performance only when individuals had central positions in their network. Continuing the theme of contextual knowledge, but focusing on issue selling, Dutton & Ashford (1993) suggested that individuals with deep functional information and expertise on a particular issue are more likely to attain top management's attention on the issue. These individuals can package the issue in a way that suits the context, such as framing issues to have higher payoffs, to be relevant to the organizational strategy, and to be issues that can be resolved by the top management. Supporting this, Ashford et al. (1998) provided empirical evidence that selling issues that relate to one's functional expertise provides the seller with more credibility, and therefore reduces the risks associated with issue selling and increases the probability of selling success. Furthermore, tailoring the selling attempt to match prevailing organizational norms is important (Ashford et al. 1998, Dutton & Ashford 1993). Dutton et al. (2001) delineated and highlighted the role of both normative knowledge (understanding of the appropriate behaviors, norms and protocols in the organization) and strategic knowledge (understanding of organizational goals, plans, and priorities) as enabling the issue seller to tie the issue to organizationally valued goals. Howell & Boies (2004) similarly identified a focus on strategic alignment as important for champions introducing organizational innovations.

**Studies that focus on aspects of the situation.** Some studies focus on aspects of the situation that cue, foster, or even allow relevant proactivity within the task and strategic environment. Thus, drawing on trait activation theory (Tett & Burnett 2003), which proposes that particular traits will be expressed in situations for which that trait is relevant, Wang et al. (2017) showed that a proactive team climate moderates the link between proactive personality and engagement, which in turn affects job performance. They reasoned that, when proactive individuals are situated in teams that have high proactive personality on average, their proactive personality is activated because the team signals that proactivity is expected and valued within the situation.

Parker (2007) applied similar reasons to explain why the positive effect of a flexible role orientation (a form of proactive motivation) on job performance was stronger under the condition of high job autonomy. Parker argued that autonomy is a task and strategic context in which self-directed and proactive behaviors are likely to be more important, and hence more likely to be activated and expressed.

Proactivity might also simply be more possible in some task and strategic environments. Thus, another explanation of the moderating role of job autonomy shown in Parker's (2007) study derives from a situational strength perspective (Mischel & Shoda 1995). That is, when job autonomy is high, there is more scope for the individuals' personality or behavior to affect outcomes. As a similar example of this reasoning, Kim et al. (2009) showed that proactive behaviors such as feedback seeking and relationship development had stronger relationships with performance outcomes when job autonomy was high, a context that provides individuals the freedom to utilize the information acquired through their proactive behaviors. Focusing on newcomer socialization, Fang et al. (2011) similarly highlighted in their conceptual model how newcomer proactivity is less needed in contexts with highly institutionalized tactics, which provide detailed steps to follow and thus have less ambiguity. In contrast, newcomer proactivity plays a more important role in the outcome under individualized tactics, where roles and expectations are less clear, thus calling on newcomers' personal proactivity to reduce uncertainty.

**Studies that focus on the interaction between the person and the situation.** A handful of studies consider how the person and the context interact together, including how they align or “fit,” and thereby enable the “right” type of proactivity for the tasks and strategy. For example, Erdogan & Bauer (2005) found that only when there is good person-organization (P-O) and person-job (P-J) fit, did proactive employees reap benefits in terms of their career well-being and performance. The authors suggested that P-O fit means employees better understand what their organizations value, thereby engaging in the needed changes more effectively. P-J fit, as an indication of the match between individuals' knowledge and skills and job requirements, allows employees to bring their proactive efforts to an effective conclusion by analyzing the situation and resolving problems appropriately.

Other studies show how there needs to be, in essence, a “fit” between how individuals collectively bring about proactive change and the organization's operating environment. Vough et al. (2017) unpacked how individuals are proactive in a call center context that has highly interdependent tasks and standardized processes—a task context in which any change made by one employee has to be adopted by others. Proactivity was found to be fostered by a “proactivity routine” in which individuals engage in a highly consistent process to coordinate actions among multiple actors. For instance, once employees identify an issue, they would engage in evidence-building by working with team members to collect examples to demonstrate the systemic nature of the issue, before escalating the evidence to managers, who are in positions to enact the changes. Such a routine allows individuals to implement proactivity within a highly constrained task and strategic context. In a similar study, Leana et al. (2009) found that in the highly interdependent childcare work context, collective job crafting engaged in by the whole team led to better quality of care and job satisfaction than individual job crafting, given that collective crafting facilitates information sharing and team learning that are needed in a highly interdependent task context.

Similarly, studies focusing on selling social issues (e.g., environmental/gender equity issues) within for-profit organizations confirm the importance of ensuring that the issue selling “fits” with this unique context (Alt & Craig 2016, Howard-Grenville 2007, Wickert & de Bakker 2018). Because social issues are often not directly linked to the business objectives of these organizations, it is critical for issue sellers to accumulate assets (e.g., authority, networks, and normative knowledge),



connect to the values of the organization and the selling target, and engage in adaptive moves so as to achieve success.

As one final example, Glaser et al. (2016) simultaneously tested individual characteristics and situational factors as moderators of the personal initiative–performance relationship. First, they found that individuals with a high risk propensity lack an understanding of the risks within particular situations, and hence their proactivity is less likely to result in improved performance. Second, consistent with the studies above focusing on situational strength, they found that the moderating effect of risk propensity arose only in “weak” situations, such as those with high job autonomy and weak performance management systems. Overall, this study highlights that the effectiveness of one’s proactivity depends on whether the initiator has a sophisticated consideration of potential risks in that context, although this effect is more likely in a non-constraining work context.

**Summary.** Studies from multiple angles suggest that the more proactivity fits with, or is suited to, the task and strategic goals of the entity within which proactivity is being initiated, the more likely it will be effective. Personal attributes such as political skills and situational judgment, as well as possessing contextual knowledge, appear to help the initiator tailor their proactivity to the tasks and strategy. More autonomous and less institutionalized situations seem to activate, as well as enable, appropriate proactivity. Finally, the more a person “fits” with their environment, and behaves proactively in accordance with relevant operating routines, the more likely that proactivity will be successful in that task and strategic context.

## Social and Relational Considerations

When initiating and striving for change, in addition to the task and strategic context, there is a social and relational context that needs to be considered. Much work is interdependent, so one’s proactivity is likely to affect others, and might even require their approval or input to be successful. Many studies in our review identified social and relational factors within the work context that mitigate, enhance, or in some other way impinge on, the effectiveness of proactivity. The same types of evidence we reported above apply here, although additional evidence also comes from studies comparing different forms of proactivity (see **Supplemental Appendix 2, Table B** for the full list of studies in this category).

**Studies that compare different forms of proactivity.** Several studies suggest that the more challenging the proactivity is, the less positive the outcomes, due to the disruption that challenging proactivity causes for interpersonal processes. This research tends to arrive at this conclusion by comparing the differential effect of different forms of proactivity. Focusing on voice, Burrell (2012) found that supportive forms of voice (voice that preserves existing or planned policies and practices) led to better performance ratings and more endorsement of the ideas from managers, compared to challenging forms of voice that aim to alter accepted policies, practices, or strategic directions. Burrell reasoned that managers tend to view employees who frequently engage in challenging forms of voice as less loyal and more threatening. Similarly, a meta-analysis by Chamberlin et al. (2017) found that promotive voice (raising suggestions to improve future functioning of organizations) positively predicted job performance, whereas prohibitive voice (voice to address problems that might cause harm) had a negative relationship with job performance. They suggested that promotive voice conveys positive messages about opportunities and “what could be,” whereas prohibitive voice emphasizes harmful or failing practices that are currently in place, and thus is more likely to disturb interpersonal relationships within the social context. Similar findings were obtained by Maynes & Podsakoff (2014), and are also suggested in

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studies that compare whether the form of proactivity is team oriented or individually oriented. For example, in the context of the US air force, Hirschfeld et al. (2011) found that team-oriented proactivity had a significant positive effect on observers' rating of the officers' advancement potential, whereas individually oriented proactivity had a negative effect, as this proactivity can be perceived as egocentric and selfish, thus harming the perceptions from supervisors.

With a slightly different perspective, yet also highlighting social processes, Rousseau et al. (2009) compared how different i-deals (in which individuals proactively secure specialized treatment for themselves) impact employment relationships. They found that compared to ex ante negotiation of i-deals (i-deals prior to the formation of employment relationships), ex post negotiation (i-deals after the formation of employment relationships) indicates one's contribution to the organization rather than one's labor market value, and thus relates more strongly to one's relationship with the employer. Also, compared to work hours i-deals, which represent concrete material and monetary resources, developmental i-deals are more relational in nature and correspond to employees' social-emotional needs, and thus more strongly relate to one's social exchange rather than economic exchange with the employer. Overall, ex post i-deals and developmental i-deals appear to represent and reinforce stronger social relationships with the employer.

More generally, although not comparative with other forms of proactivity, studies of i-deals suggest this type of proactivity can engender somewhat unique interpersonal dynamics around social comparison. Drawing on equity theory, Ng (2017) found that receiving i-deals (referring to the extent an employee has successfully negotiated i-deals) and witnessing coworkers' i-deals (referring to the extent an employee has observed coworkers' successfully negotiated i-deals) can result in being envied by others and in envying others, respectively. These feelings create a competitive work environment, leading to felt ostracism and voluntary turnover. Other studies reveal varying complex interpersonal dynamics associated with i-deals in team contexts that mitigate its effectiveness (e.g., Guerrero & Challiol-Jeanblanc 2016, Liao et al. 2017, Vidyarthi et al. 2016). It seems that i-deals are a form of proactivity that has the potential to create a perception of inequity that can strain social relationships at work.

**Studies that focus on aspects of the proactive person.** Several studies suggest that interpersonal capabilities of the proactive individual will enhance the likelihood of positive benefits from their actions. Above we discussed the importance of political skills; however, a recent study suggests it might be the interpersonal aspect of political skills that is especially critical in moderating the impact of personal initiative on performance (Wihler et al. 2017). The authors reasoned that, when individuals are interpersonally influential, they are able to exert mastery, convey confidence, and create favorable impressions, and thus can leverage their proactivity to achieve desirable performance. Similarly, beyond contextual knowledge (see above), "relational knowledge," referring to the issue seller's understanding of social relationships (Dutton et al. 2001) and the relationship quality between the issue seller and critical decision maker (Ashford et al. 1998), is important for the issue seller in engaging and influencing decision makers appropriately. Grant (2013) similarly found that emotion regulation knowledge, or knowing how to constructively manage emotions, enables employees' voice to elicit favorable performance evaluations from managers, as employees can express their suggestions in a constructive manner, and thus reduce the threatening interpersonal aspects of voice.

Research suggests it is not only individuals' interpersonal skills and knowledge that determine whether proactivity results in positive outcomes, but also their motivation. Grant et al. (2009) showed that, when employees have high prosocial values, proactivity was associated with higher performance evaluations, as such values enabled supervisors to attribute employees' proactivity to benevolent intentions rather than self-serving intentions. Focusing on i-deals, Rofcanin et al.



(2017) studied “what seals the deal” after employees have negotiated i-deals with their managers (but not yet acquired the negotiated i-deals). They suggested that after i-deal negotiation, managers attempt to observe if the focal employee shares the gains and benefits of i-deals to the coworkers and contributes to team efficiency. If employees demonstrate relational behaviors such as helping coworkers, managers infer the social benefits of such i-deals and thus feel more positive, and—as such—eventually grant these i-deals.

Beyond interpersonally oriented capabilities and motives, status is a further relational attribute that shapes interpersonal dynamics and hence affects proactivity outcomes. Whiting et al. (2008) suggested that voice is only predictive of performance when the voicer is perceived by others to provide an important and valuable contribution to the organization. Howell et al. (2015) argued that the status of a voicer shapes whether their message is considered and acted on by managers. They found that managers are more likely to recognize voice from, and subsequently grant higher performance evaluation to, those with higher status, such as those from majority demographic background (ascribed status), from full-time workers (assigned status), and from those central in the advice network (achieved status). Drawing on minority influence theory, Li et al. (2015) similarly argued, and showed, that the effect of proactivity on one’s work unit is contingent on the individuals’ position in their social network, with more influential individuals being more likely to achieve a change in team processes. Finally, Dutton & Ashford (1993) and Ashford et al. (1998) suggested that issue sellers who are perceived of as a “credible source” are more likely to attain top management’s attention on an issue. All these studies thus show that individuals’ formal and informal status plays a role in determining the effectiveness of their proactivity.

**Studies that focus on aspects of the situation, including others’ reactions.** Proactivity almost always occurs within a social context, and as such is often accompanied by a reaction from others. With its focus on changing the status quo, proactivity is not always welcomed by supervisors and managers (Frese & Fay 2001, Parker et al. 2010). Several studies have focused on how these interpersonal reactions by others can shape the outcomes of proactivity.

Attributes of leaders, and their associated behaviors, appear to be especially important. For instance, Grant et al. (2011a) found that proactive behavior contributes to group performance only when leaders are quiet and reserved. Drawing on the dominance complementary perspective, they argued that extraverted leaders typically engage in dominant, assertive behaviors and, as such, appreciate submissive rather than dominant behaviors from subordinates. Proactive behavior can be viewed as a form of dominance, and such behavior can be viewed as threatening and thus less well received by extraverted leaders. In a different context and focusing on socialization, yet suggesting a similar process, Wang & Kim (2013) showed how Chinese supervisors’ traditionality (i.e., focus on maintaining hierarchy) moderated the effect of newcomers’ proactive socialization behaviors. Supervisors with low traditionality willingly interacted with newcomers, and perceived proactive socialization behaviors as positive and enterprising. In contrast, supervisors with high traditionality maintained their authority and differential status with respect to newcomers, and preferred newcomers to follow their strict guidance rather than being proactive, which in turn reduced the extent to which proactive newcomers achieved positive socialization outcomes. In a related vein, evidence suggests leaders need to be “open” to proactivity for it to have maximum impact. Tucker & Turner (2015) showed that safety voice (speaking up about physical hazards) reduced injuries only when supervisors were open to suggestions. Fuller et al. (2015) showed that leaders’ felt responsibility for change moderated the positive effect of employees’ proactive behavior on performance outcomes. Leaders with strong feelings of responsibility for change appear more likely to value and give credit to employees’ proactive behaviors, as these behaviors enable them to fulfill their responsibilities and achieve positive outcomes. When leaders do not feel such

responsibility, they are less likely to view employee proactivity as having utility and instead view it as challenging and disruptive. Similarly, Fast et al. (2014) found that managers with low managerial self-efficacy in ego threat situations were more likely to react negatively to employee voice, as the challenging nature of this behavior can lead these managers into a state of ego defensiveness. As a way of self-protection, these managers tend to denigrate others, such as by evaluating the voicer in a negative way, and by choosing not to adopt their ideas. In a diary study, Cangiano et al. (2018) found that supervisor reactions play an important role in whether proactive behavior is resource draining or resource generating for the person's well-being. They found that the positive effects of proactivity on daily competence and subsequent end-of-day vitality were shaped by whether supervisors were punitive. Participants who had supervisors who blamed them for their mistakes reported greater anxiety on days in which they engaged in proactive behavior at work.

Finally, focusing on context beyond leader behavior, Li et al. (2010) theorized that a high justice climate reinforces positive, reciprocal social exchange relationships, which enables proactive individuals to feel comfortable to display initiative and to use their initiative as a way to reciprocate fair treatment from organizations. In contrast, poor procedural justice climate will evoke negative feelings from proactive employees, reducing their desire to go beyond their core job roles. Consistent with this reasoning, they found that proactive personality was negatively linked to organizational citizenship behavior when procedural justice climate was low, although the positive relationship was insignificant when procedural justice climate was high.

**Studies that focus on how the person and the situation interact.** Some studies consider how both person and situation factors operate together to mitigate the outcomes of proactivity. In two studies focusing on leaders' reaction to voice, Sijbom et al. (2015a,b) showed that leaders with performance-oriented goals, rather than mastery-oriented goals, are less open to input from subordinates due to perceived threat to their image. However, individuals can take steps to mitigate this effect. When subordinates focus on providing creative input, rather than highlighting the problem that can pose a potential threat to the leader, performance-oriented leaders are more likely to be receptive to the voice. Similarly, when subordinates voice in a considerate manner such as by requesting the leaders to consider the input, rather than in an aggressive mode such as by trying to overrule the leader, performance-oriented leaders are more likely to adopt these ideas. In another study, Urbach & Fay (2018) studied how the power struggle between supervisors and employees impacts supervisors' receptiveness to promotive voice. Supervisors with high power motives were less likely to support a power-threatening idea, and this was especially true when the supervisor perceived the idea-presenting employee to have high power motives. The dynamic interpersonal effect between employees and supervisors has also been applied to the context of peers. Urbach et al. (2016) found that peer evaluators are less likely to support an innovative idea when the idea threatens their achievement motives, and are more likely to support an innovative idea when they attribute idea presenters' intention as prosocially, rather than egoistically, motivated.

Some studies show the importance of "fit" between proactive employees and their supervisors. Zhang et al. (2012) found that more congruence in proactive personality between a leader and an employee leads to better relationship quality between them, which results in positive performance and attitudinal outcomes for the employee. When the leader is more proactive than the follower, however, the incongruence effect was detrimental to relationship quality. Fuller et al. (2012) similarly found that taking charge predicted performance when supervisor's proactive personality was high, and there was a cost on the performance rating for employees who did not take charge yet had a proactive supervisor.

In yet another approach to examining fit, some studies focus on the quality of the relationship between the person initiating proactivity and those affected, especially leaders. Ho & Tekleab

(2016) found that an i-deal request has a significant positive relationship with receiving an i-deal, but only when there is high leader-member exchange (LMX)—a context where leaders would value and trust subordinates, perceiving them as deserving of the individualized treatment of i-deals and as unlikely to abuse such favorable treatment. Huang et al. (2018) revealed a curvilinear relationship between voice frequency and manager's evaluation, such that moderately frequent voice is ideal: Too little voice means little initiative, whereas too much voice is likely to be perceived as persistently challenging the status quo. They also found this curvilinear relationship to be less salient among supervisor-subordinate dyads that have high LMX, a context in which managers would trust the voicer and thus give favorable judgment, regardless of the subordinate's voice frequency.

Although the above studies tend to suggest a positive synergy when the person and the context (e.g., the leader) support proactivity because of the positive interpersonal dynamics, some studies suggest contrary relationships. For instance, in understanding the impact of feedback-seeking behavior on job performance, Lam et al. (2017) suggested that good relationships with a supervisor indicates that the supervisor would have already provided adequate feedback information to the subordinate, thus diminishing the value of further feedback-seeking behavior. Likewise, to understand the impact of i-deals on citizenship behaviors, Anand et al. (2010) considered that employees who have high-quality relationships with their leaders and team members already feel appreciated in the workplace, and thus may experience little enhancement by having i-deals. In contrast, those in low-quality relationships with supervisors and coworkers may obtain greater value from having i-deals, as such i-deals could compensate partially for the lack of quality relationships. In reconciling this finding with studies that generally suggest positive synergies, it might be that LMX plays a different role according to the stage of proactivity. High LMX may be more instrumental in the initial stage of proactivity, whereas once the proactive outcome is obtained, high LMX has a diminishing value in terms of performance outcomes. Regardless of the specific relationship, these studies highlight that relationship quality with others (leaders and/or coworkers) plays an important role in the proactivity-outcome relationship.

**Summary.** Many studies highlight the need to consider social and relational factors to understand the effects of proactivity. First, more prosocial or team-oriented forms of proactivity seem to be more positively received by others, whereas i-deals appear to invoke particular interpersonal challenges. Second, interpersonally oriented attributes and motives of the proactive individual shape the effect of proactivity. Third, positive social contexts for proactivity appear to be those in which leaders are “open” to proactivity and less threatened by this behavior (such as those who are less dominant), as well as those that facilitate positive exchange relationships (e.g., justice climate). Finally, most studies suggest that fit between the person and the situation seems to boost the effects of proactivity, although it seems that misfit can sometimes have a supplementary effect.

## Self-Regulatory Considerations

Beyond attention to the context, scholars have theorized that behaving proactively requires considerable “internal” navigation, or self-regulation. This is because proactivity is self-initiated and change focused, which makes it psychologically risky (Fay & Frese 2001). Proactivity also often requires considerable persistence, and can be highly consuming of one's psychological resources (e.g., Bolino et al. 2010, Strauss & Parker 2014). Several types of evidence support the mitigating role of factors related to self-regulation: studies that compare different forms of proactive behavior, studies that focus on person attributes, and studies that focus on situational attributes. We discuss these studies below and a full list of studies is presented in **Supplemental Appendix 2, Table C.**

**Supplemental Material** >

**Studies that compare different forms of proactive behavior.** Some research suggests that engaging in the “right form” of job crafting fulfills employees’ needs and fosters effective self-regulation, hence increases the chance of positive outcomes. Several studies have shown how different forms of job-crafting behavior relate differently to outcomes. In a longitudinal study (Petrou et al. 2018) and a diary study (Demerouti et al. 2015), crafting to seek resources (e.g., expanding one’s tasks) was found to positively associate with work engagement, whereas crafting to reduce demands (e.g., avoiding some tasks) was found to negatively associate with work engagement. In a meta-analysis, Rudolph et al. (2017) found that increasing structural job resources had the strongest relationship with job attitudes, well-being, and self-rated performance, as this job crafting dimension contributes to individuals’ learning, growth, and improved work capability, relative to increasing social job resources, increasing challenging job demands, and decreasing hindering job demands. Using profile analysis, Makikangas (2018) revealed that employees can be categorized into “active job crafters,” featured by relatively high use of all different crafting behaviors, and “passive job crafters,” featured by high use of reducing hindering demand but little use of other crafting behaviors. Active crafters had higher work engagement than passive crafters. Finally, Bruning & Campion (2018) developed a  $2 \times 2$  model for job crafting by putting role crafting versus resource crafting on one axis, and approach crafting versus avoidance crafting on another. The resulting four crafting behaviors from this model were found to have different implications on various performance and well-being outcomes. Overall, these above efforts on job crafting consistently supported that the type of crafting matters and that active, approach-oriented crafting is better than passive, avoidance-oriented crafting, which likely in part stems from the underpinning motives of these different forms of crafting.

Studying feedback seeking, Gong et al. (2017) differentiated four types of feedback-seeking behavior depending on the foci (self or others) and nature (positive or negative), in that individuals can seek either positive or negative feedback, either about themselves or about others. Underpinning their different feedback-seeking behaviors by the goal orientation framework (VandeWalle 2003), they found that the relationship with performance was positive for both self-negative feedback seeking, which allows individuals to identify areas for improvement and thus close their performance gaps, and for other-positive feedback seeking, which allows individuals to learn from the success of others. In contrast, self-positive feedback seeking negatively related to performance, as the information obtained does not contribute to learning and improvement and instead leads to self-contentment. Overall, this study shows that feedback-seeking behavior is better for performance when it comes with a learning focus.

**Studies that focus on attributes of the proactive person.** Studies have shown that individuals’ self-efficacy and self-evaluation can moderate the outcomes of proactivity, likely because such attributes foster learning and persistence. For example, Liang & Gong (2013) suggested that proactive personality enables early career employees to engage in proactive behaviors such as voice and networking, which further leads to receiving career-related and psychosocial mentoring at work. However, this relationship was particularly strong among those with high core self-evaluation, as positive self-views can help people overcome the obstacles involved in being proactive. In the context of an emergency unit in a hospital, Nguyen et al. (2016) similarly found that role-breadth self-efficacy, which refers to individuals’ belief in their ability to extend beyond core duties, moderated the relationship between proactive role behavior and performance evaluations such that the relationship was stronger and more positive for those with high role-breadth self-efficacy. In general, it seems that positive self-views help ensure the effectiveness of proactivity. However, this may not always be the case. Ng & Feldman (2010) found that when it comes

to the relationship between i-deals and organizational commitment, core self-evaluation had a suppressing effect rather than enhancing effect, as individuals with high self-worth may feel entitled to i-deals, thus attenuating their positive value.

Also important is employees' motives when being proactive. Some motives appear to foster learning and persistence. As an example, Dahling et al. (2015) found that feedback-seeking behaviors lead to positive performance only for employees with a low image enhancement motive. When underpinned by a motive of image enhancement, feedback seeking is unlikely to yield performance returns because employees engage in the behaviors only to promote a favorable public image rather than to use the feedback for learning. Similarly, Lam et al. (2007) found that—only when supervisors appraised employees' feedback-seeking behaviors as driven by employees' desire to enhance performance, rather than by impression management motives—such behaviors lead to better relationships with supervisors and higher performance evaluations. On the other side of the coin, autonomous motivation (and/or a lack of controlled motivation) appears to foster learning and persistence. Drawing on self-determination theory, Grant et al. (2011b) found that when individuals engage in initiative taking under high autonomous motivation and low controlled motivation, the proactivity originates from the person themselves rather than being coerced, which fuels the psychological resources that contribute to performance. In a similar vein, but focusing on job strain as an outcome, Strauss et al. (2017) found that when individuals' motivation is highly controlled without autonomous motivation, their proactivity leads to job strain, likely because such proactivity depletes resources without providing additional restoring energy.

Employees' sensitivity to reward and punishment can also elicit different outcomes for proactivity due to its association with individuals' behavioral approach and inhibitive systems. Gawke et al. (2018) found that employee intrapreneurship impacted performance both through an energizing pathway (via work engagement) and a resource-depleting pathway (via exhaustion). However, these pathways depend on individuals' sensitivity toward reward and punishment. Those with high reward sensitivity are more likely to focus on the positive outcomes associated with intrapreneurship, thus their intrapreneurship tends to foster engagement and lead to positive outcomes. In contrast, those high on punishment sensitivity tend to focus on the negative outcomes, thus their intrapreneurship can lead to exhaustion and have subsequent negative impact on work outcomes. These results highlight how individuals' motivational systems shape the effectiveness of their proactive behavior.

Career goal importance, and degree of work centrality, also appears important. Creed et al. (2017) found that individuals' career goal importance moderated the effect of proactivity on goal-performance discrepancy, such that those with higher career goal importance worked more actively toward altering their situations to reduce the discrepancy, thereby enhancing the effect of proactivity. Petrou et al. (2017) found that, although weekly job crafting led to enhanced weekly work engagement, this within-person relationship was moderated by a cross-level moderator of occupational role salience. The within-person effect was stronger among those with high levels of occupational role salience, as individuals who treat work as their primary source of meaning bring more intrinsic motivation to their work, willingly invest more energy into it, and therefore benefit more from engaging in job crafting. It seems that individuals who consider work as an important part of their lives are more motivated in engaging self-regulatory processes and thus benefit more from being proactive.

Related to learning and motivation, Deichmann & van den Ende (2014) sought to understand how employees' learning from prior success and failure in initiating radical ideas influenced their engagement in subsequent initiative taking, as well as the outcomes of initiative taking. In an organization with an innovation program that encourages radical ideas from employees, evaluates

ideas, and, through a selection process, puts the approved ideas into action, previous failure was associated with repeated initiative taking—possibly given that failure in this safe context leads to an increased sense of challenge and persistence, and it may also lower the expectations of the initiative taker. However, when it comes to the outcomes of initiative taking, it was success, rather than failure, that had a more significant effect. It seems that prior success offers valuable knowledge that helps to improve the quality of future initiative taking.

Sometimes the most appropriate motive changes according to the form of proactivity. Wu et al. (2014) investigated how individuals with different attachment styles respond differently to feedback, which thereby affects the strength of the relationship between feedback inquiry and performance. They theorized that individuals with high attachment anxiety, as characterized by excessive need for others' approval, are more likely to accept feedback and modify their behaviors so that they can maintain relationships with colleagues. They indeed found that the positive relationship between feedback seeking and performance was stronger for those with high attachment anxiety than those with low anxiety.

**Studies that focus on aspects of the situation.** Different situations can have a different impact with regard to fostering self-regulatory processes, thereby affecting learning and persistence, and hence the likelihood of positive outcomes from proactivity.

De Stobbeleir et al. (2010) studied how managers' implicit person theory impacted their reactions to employees' feedback seeking. They expected that when managers hold the belief that people's abilities are fixed (entity theory) rather than malleable (incremental theory), they will tend to see little value in engaging in behaviors that are aimed at learning and developing capabilities (e.g., feedback seeking). Indeed, they found that managers with more entity-oriented personal theories were more likely to attribute feedback-seeking behavior to impression management motives, and hence evaluate them less favorably. Studies also focus on the organizational context that fosters learning. Chen & Hou (2016) found that team innovation climate moderated the effect of voice on creativity, as this climate encourages employees to be flexible, expressive, and willing to learn. Similarly, in a healthcare context, Stern et al. (2008) found that resident physicians' perception of their hospitals' "situational learning orientation" (an environment focused on learning and improvement) moderated the effect of voice behavior on the residents' treatment errors. Voice significantly reduced treatment errors only when employees perceived high situational learning orientation in their workplace.

Also recognizing the importance of an environment that allows for persistence and self-regulation, Song et al. (2017) considered workplace stressors as a moderator of the relationship between voice and creative performance. They found that high challenge stressors consume resources from the voicer, depriving them of energy to be invested into the creative process, thus attenuating the relationship from voice to creative performance. However, the voice-creative performance relationship was stronger within the situation of high hindrance stressors, given that individuals can take a passive reaction toward this stressor, thus preserving energy and resources for being creative. Supporting the view that some contexts can be resource depleting, a recent study by Zacher et al. (2018) revealed that in different contexts, changes in personal initiative can have different consequences for one's mood. They found that when individuals increased their personal initiative, but did not feel valued by their organization (i.e., perceived organizational support), their negative mood would increase subsequently.

**Summary.** Effective internal self-regulation appears important for fostering the learning and persistence needed to obtain benefits from proactivity. Self-regulatory processes appear to be



enhanced when an individual engages in forms of proactivity that accumulate resources, and when they themselves possess high personal resources such as positive self-views (although note the contrasting finding from Ng & Feldman 2010). Similarly, climates and leaders that prompt effective learning tend to enhance the positive outcomes that can accrue from proactivity.

## Overall Summary and Studies Assessing Multiple Factors

First, studies from multiple angles and across multiple forms of proactivity suggest that the more proactivity fits with, or is suited to, the tasks and goals of the entity (e.g., team, unit, or organization) within which proactivity is being initiated, the more likely it is to be effective. Second, the more proactive employees consider their social and relational context, and stay attuned to the characteristics of others, the more likely their proactivity will be effective. Third, effective self-regulation appears important to protect one's resources and foster learning and persistence during proactivity.

In addition to the studies reviewed above, some studies take a more holistic perspective, simultaneously investigating or considering multiple factors. These studies (see **Supplemental Appendix 2, Table D** for the full list) tend to identify variables that fit within the three overarching categories. As one example, Janssen et al. (2004) identified moderators that can shape the outcomes of individuals' innovation. These moderators map onto the three categories. For example, in relation to task and strategic considerations, organizations in which employees are encouraged to adapt to change tend to welcome innovation more so than mechanistic organizations that are aimed at being predictable; with respect to social and relational considerations, ideas that are radical rather than incremental are argued to encounter more resistance from and conflict with coworkers, and hence less likely to be accepted; and with respect to self-regulation, innovation may incur more psychological costs to individuals who consider job performance as central to their sense of identity. Overall, this article covers all three categories of moderators, as indeed do other studies and reviews of innovation that consider multiple moderators (e.g., Baer 2012, Howell & Boies 2004). A similar conclusion applies in other proactive domains, including proactive followership (Benson et al. 2016), voice (Burris et al. 2017; Whiting et al. 2008, 2012; see also reviews by Bashshur & Oc 2015, Morrison 2014), issue selling (Ashford et al. 1998, Dutton & Ashford 1993, Dutton et al. 2001, as discussed earlier; see also Alt & Craig 2016, Howard-Grenville 2007, Wickert & de Bakker 2018), feedback seeking (Ashford et al. 2016), and job crafting (Berg et al. 2010, Dierdorff & Jensen 2018, Weseler & Niessen 2016). Finally, our proposed structure is also consistent with the three foci proposed by Belschak & Den Hartog (2010), who considered that proactivity can be directed at organizations, others, and self.

Altogether, the three categories we have identified appear to be a sound starting point for synthesizing the key factors that mitigate or enhance the effects of proactivity. Nevertheless, a small number of studies addressed somewhat idiosyncratic factors that go beyond those identified in our three-category structure (see **Supplemental Appendix 2, Table E**). For instance, several studies discussed culture as a potential moderator such that the impact of proactivity can differ across cultural contexts (Liao et al. 2016, Rooks et al. 2016, Smale et al. 2018). Further research could explore these factors to identify how generalizable their influence is across different forms of proactivity. Moreover, the existing body of research, although informative, is mostly indirect when it comes to identifying what an individual can do to enhance the likelihood of success when embarking on proactivity. Studies either compare forms or investigate the personal and situational moderators of the relationship between proactivity and outcomes. In what follows, we propose a more direct, as well as a more theoretical, approach to the topic.

Supplemental Material >

## MOVING BEYOND THE REVIEW: AN INTEGRATING FRAMEWORK FOR INDIVIDUAL ACTION

We draw on the categories identified in the literature review, as well as theories of wisdom, to suggest ways that a proactive individual might behave to gain greater benefits from proactivity. In adopting this approach, we seek to move the literature away from primarily focusing on how much or how often employees are proactive, which is then moderated by individual-level or contextual attributes, to focus instead on “how” individuals are proactive. Theoretically, our approach provides a closer tie in to other theories of human action. Practically, a focus on “how” someone is proactive provides a clear point of leverage for intervention.

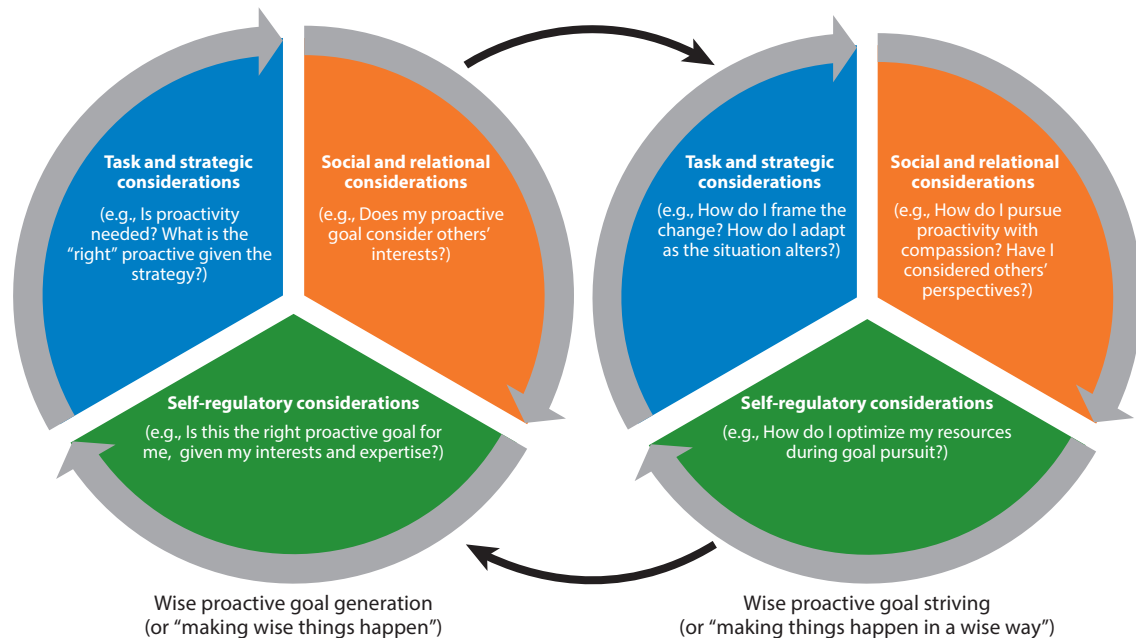
To identify how someone can be proactive in a way that generates positive outcomes, we draw on wisdom theories. The concept of wisdom comes to the fore when a situation is difficult and complex (Staudinger & Gluck 2011), as is often the case with proactivity (Parker et al. 2010). We particularly draw on Sternberg’s (1998) balance theory of wisdom, one of the most extensively validated wisdom theories (Staudinger & Gluck 2011), to suggest that the behaviors we can extrapolate from the three categories identified in our review collectively constitute “wise proactivity.” From Sternberg’s (1998) perspective, wise solutions to difficult problems involve optimizing the outcomes across multiple interests to achieve a common good, notably “through a balance among multiple (*a*) intrapersonal, (*b*) interpersonal, and (*c*) extrapersonal interests” (Sternberg 1998, p. 347). Task and strategic considerations, our first category of factors above, maps onto Sternberg’s notion of “extrapersonal” (or broader system) interests. Social and relational considerations, the second category of factors, maps onto Sternberg’s notion of “interpersonal interests.” Finally, self-regulatory factors, the third category of moderators, reflects Sternberg’s notion of “intrapersonal” interests. We argue, therefore, that proactivity is more “wise” to the extent that it involves consideration of the task/strategic context, consideration of the social and relational context, and consideration of one’s own self-regulation.

Importantly, however, as observed by Staudinger & Gluck (2011), wisdom entails more than behaviors to address difficult situations. Rather, wisdom involves managing dialectics, or tensions, within a situation. Thus, we argue that wise proactivity involves simultaneous and balanced consideration across all three elements. For example, if one were to consider only one’s self-regulation when being proactive—without considering the interests of the tasks/strategy or others—this hardly would be considered wise. Thus, our notion of wise proactivity captures what is at the very heart of wisdom, which is the managing of dialectics, or elements that are often in tension, in this case, the balancing of different external and internal interests. In sum, our definition of wise proactivity is as follows: Wise proactivity involves considering, in a balanced way, the task/strategic context, the social and relational context, and one’s own self-regulation when generating and striving for proactive goals.

We elaborate the notion of wise proactivity next. We draw on the process model of proactivity (Bindl et al. 2012, Frese & Fay 2001, Parker et al. 2010) to argue that wise proactivity means the application of wisdom in both the goal-generation and goal-striving phases. Thus, we discuss “making wise things happen,” or wise proactive goal generation, and then “making things happen in a wise way,” or the wise pursuit of a proactive goal. **Figure 1** summarizes our perspective.

### Making Wise Things Happen

When generating a proactive goal, individuals need to draw on their political skills, situational judgment, and contextual knowledge to initiate change that “makes sense” given the tasks and



**Figure 1**

The concept of wise proactivity, which involves the balanced consideration of the task and strategic context, social and relational aspects, and one's own self-regulation, when setting and striving to achieve one's proactive goals.

strategy within the situation. In some cases, initiating change will not be the best option: Adaption or accommodation to the situation might be more appropriate (Sternberg 1998). In other words, sometimes proactivity might be unnecessary given the strategic goals, or the organization or unit might not be ready for change (Eby et al. 2000), in which case it would be wiser to not initiate change. If change is warranted, then the change that is initiated should be appropriate for the tasks and strategy of the entity. That is, it needs to be "the right change" (Kotter 1996). This will often mean change in which longer-term gains are prioritized, as well as change that seeks to prevent or remove the root cause of the problem, rather than short-term focused change or change that addresses only the symptoms. Sternberg (2015) in an interview commented that wisdom is "not just doing what is good for others today or tomorrow, but what's good in the long-term. . . ."

Wise proactive goal generation further means that the initiator of change actively considers the social and relational context. As we discussed above, there is considerable evidence that proactivity is more likely to be effective when an individual introduces forms of proactivity that are less threatening to others, and when the individual possesses and applies interpersonally oriented capabilities. We also identified in our review the moderating role of prosocial motives, or caring about others. In the wisdom literature, the consideration of others is commonly referred to as virtue. Brown (2005, p. 365) asserted that "behavior might be crafty, cunning, prudent, skilled and so on, but would not be called wise if it did not promote some identifiable good." Staudinger & Gluck (2011, p. 217) discussed that an essential component of wisdom is a motivational orientation that "transcends self-interest and is invested in the well-being of others and the world." Thus, from this perspective, setting a wise proactive goal means setting a goal that is not just interpersonally skilled but involves considering others' interests. Even when an individual sets out to benefit himself or herself through proactivity, this individual can actively take account of the interests

of others while doing so. For example, proactively renegotiating one's work demands with one's supervisor would not be considerate of others if the negotiation simply involved off-loading the extra work demands onto already overburdened peers. However, such job-role negotiation would be considerate of others, and hence wiser, if the individual took steps to renegotiate the demands placed on the whole team, or if the reallocation of demands was compatible with other team members' needs for development. It is interesting to note that being "wise" by taking account of the social context might sometimes mean engaging in multiple forms of proactivity simultaneously, such as initiating change to improve work methods (i.e., taking charge) and proactively seeking feedback about how that change is proceeding (active feedback seeking that we assert would help to ensure the proactivity is wise).

Wise proactive goal generation also involves effective self-regulation. This perspective relates to definitions of wisdom that highlight that being wise is not just abstract and about "life in general," but it involves being wise in one's own personal life (Ardelt 2004, Staudinger & Gluck 2011). We discussed above evidence pertaining to this aspect, such as studies suggesting proactivity is less stressful and more likely to be maintained when it is autonomously motivated and linked to one's identity. More broadly, because individuals are faced with numerous potential goals, it is important that they can prioritize goals that make sense for personal growth (Baltes 1997) as well as goals that will be obtainable (Baltes 1997, Freund & Baltes 1998). From this stance, proactive goals are wiser to the extent that the selected change goal aligns with one's interests, expertise and knowledge, and/or one's personal resources (e.g., time, self-efficacy, finances, and social support). In essence, the individual should be the "right person" to initiate the proactive goal, and the goal should be "right for the person." Proactive behavior can be risky and resource-intensive for the initiator (Bolino et al. 2010), so if an individual self-initiates too many changes, unimportant changes, or changes for which the individual has insufficient resources and skills, their unwise proactivity is likely to result in resource depletion or even burnout.

Finally, consistent with Sternberg's balance theory, as well as wisdom theories that highlight the importance of managing dialectics (e.g., Labouvie-Vief 1990), we suggest that it is the balanced consideration of the task/strategic context, the social/relational context, and the self that uniquely defines wise proactive goal generation. Drawing on notions of paradox (Poole & Van de Ven 1989), a balanced consideration of these aspects might involve separating interests across people, such as by focusing on the interests of the task/strategic context when selling issues to senior managers, yet focusing more on others' interests more when dealing with immediate supervisors. Another approach might be to separate the interests temporally, such as giving more attention to some interests at some time, and other interests at different times, or finding a way to eliminate the opposition present in different interests, such as by identifying expansive goals that put any contradiction within a wider perspective (Lewis 2000).

### **Making Things Happen in a Wise Way**

By applying their domain-specific knowledge, and through the activation of their personal attributes such as situational judgment, individuals can actively consider the task/strategic context when striving to achieve their proactive goals. Many established prescriptions for effective change management (e.g., Armenakis & Bedeian 1999) relate to this need for close attention to the task and strategic context. For instance, at the outset of change, scholars advise that it is important to take account of previous change attempts when formulating plans and then to frame the change in terms of how it will resolve the problem, how it is preferred over the existing state, and how the change is motivated by compelling reasons (Battilana et al. 2009). Adaptivity is likely to be a further important behavior when striving for proactive change in a way that considers the task/strategic

context. Adaptivity means that, during proactive goal pursuit, individuals can stay tuned to what is happening in the context, monitor the intended and unintended consequences of change, and be open to adapt their approach if required.

Wise proactive goal striving also involves considering, and caring about, the interests of others. Because proactive behaviors are self-initiated, most often initiators will have a strong internal commitment to the goal (Parker et al. 2010), which can make it difficult for them to recognize that others do not share the same level of enthusiasm for the change. Thus, it is vital that the individual actively considers the perspective of others, such as by listening, inviting input, and soliciting feedback (Whelan-Berry & Somerville 2010). This is especially important since proactive change will often have consequences for others and can require their endorsement. But, as discussed earlier, it is not simply considering others' interests that matters: It is also caring about others' interests. Compassion during change implementation is therefore likely to be an important aspect of wise proactive goal striving.

With regard to effective self-regulation, optimization and compensation strategies (Baltes 1997, Freund & Baltes 1998) will likely enable the learning and persistence required for proactive change. Optimization refers to acquiring, investing in, and refining goal-relevant activities, such as allocating resources to practicing or acquiring new skills, whereas compensation refers to using alternative means to maintain a given level of functioning when goal-relevant means are no longer available, such as by using external aids or getting help from others (Freund & Baltes 1998). Optimization skills are critical for allocating personal resources to meet demands in a way that does not drain personal resources, and compensation skills play a role in coping with challenges during proactivity. Conservation of Resources theory further argues that individuals are motivated not only to protect themselves from resource loss but also to accumulate resources for future growth (Hobfoll 1989), and proactive coping theories assume that people strive to gain resources and build up capabilities to better address challenges in the future (Aspinwall & Taylor 1997). Therefore, individuals need to reflect throughout the proactive process and learn to accumulate resources so that they can continue engaging in proactivity in the future.

Finally, wise proactive goal striving involves the balanced consideration of context, others, and self during goal striving. For instance, during the goal pursuit process, an individual might be considerate of the task and strategic context, and the views of others, by implementing change in the right way and engaging stakeholders effectively; however, because of the demanding nature of proactivity, one might deplete one's resources and harm one's well-being (Bolino et al. 2010, Strauss & Parker 2014). This imbalanced proactivity would not be regarded as wise. Importantly, we see balance as dynamically considering the task/strategic context, others, and the self in accordance with the needs of the proactive initiator and the situation. The balance required might, for instance, depend on the specific proactive action. For example, a relatively momentary instance of voice behavior might require a different level of personal reflection, compared to a long, drawn-out taking-charge process that requires considerable attention to one's self interests in order to sustain commitment over time.

In sum, we propose that wise proactivity means initiating goals to make "wise things happen," and then pursuing these goals in a wise manner, effectively managing the tensions across different interests that arise. This notion helps us address complexities in how proactive change goals might at times be aligned with the organization's interests yet might not benefit others or the self, or how proactivity can sometimes help one's own career and yet harm others. By balancing the three sets of interests throughout the proactive process, the employee is more likely to successfully implement the change, receive positive appraisals by others, and experience a sense of personal achievement, which we theorize will lead to higher job performance and well-being beyond simply engaging in proactivity on a frequent basis.

## CONCLUSIONS AND FUTURE DIRECTIONS

Our review shows that proactivity is more likely to be effective when it considers the tasks and strategic context of the entity within which proactivity is being initiated; when the proactivity does not disrupt, or is harmonious with, the social and relational context; and when there is effective internal self-regulation so as to foster learning and persistence. We further show that these three categories of factors map closely onto key elements of wisdom, and we proposed the concept of wise proactivity to help embed the findings from the review within broader theories of human behavior. Additionally, we argue that the notion of wise proactivity encourages a direct focus on key behaviors that individuals engage in to achieve positive outcomes of proactivity, rather than inferring these behaviors indirectly from examining moderators of proactivity to outcomes.

Importantly, we identified common themes across multiple forms of proactive behavior. For example, factors related to the social and relational context appear relevant to voice, taking charge, issue-selling, i-deals, and proactive personality. Although we are not asserting that all forms of proactive behavior are “the same,” our analysis shows there are notable parallels among them. We hope this observation encourages researchers who are investigating specific forms of proactive behavior to draw from, and build on, research from closely related forms. We also suspect that our synthesis across several forms of proactive behavior is especially helpful when it comes to providing guidance for practitioners.

This is not to say there are not different emphases in different literatures. For example, issue selling research appears to have considered to a greater extent the importance of navigating the task/strategic context relative to other forms of proactive behavior, and i-deals seem to invoke some unique social processes around social comparison and jealousy. Such observations prompt areas of future inquiry. For example, extending the literature beyond i-deals, one might expect such processes to apply whenever proactive action engenders some perceived personal benefit for the initiator, such as with career-focused proactivity or job crafting. Even proactive work behaviors like taking charge often confer benefits to the initiator, suggesting that envy and comparison could arise.

It seems that most attention has been given to the consideration of social and relational aspects, which likely reflects that proactive behavior almost always has some consequences for, and relies on input from, others. Nevertheless, much of the attention is focused on the role of leaders, with less consideration of peers' responses to proactivity. Furthermore, most research has been rather indirect, focusing on moderators such as interpersonal abilities, rather than more directly identifying key behaviors and approaches that enable the effective consideration of social and relational aspects. The construct of wise proactivity has this more direct focus, and we have suggested that individuals who are wise will not only be interpersonally skilled but also caring and compassionate in their proactive actions.

In the future, as well as more directly examining how individuals consider the social and relational context when being proactive, there may be value in exploring the psychological processes that underpin such interpersonal considerations. For example, the activation of a relational working self-concept is important for considering others (Brewer & Gardner 1996). If this is so, we might then explore which individual attributes or situational attributes activate a relational self-concept. For example, an other-focused working self-concept is likely to be readily activated among individuals high in humility—who accept that there are things greater than the self and appreciate the worth of others (Morris et al. 2005). Or an other-focused working self-concept might be activated by a relational work design in which employees work closely with others and receive high levels of support. Altogether, there is likely to be a broader array of interpersonal factors that enable wise proactivity (or, indeed, that moderate the effects of proactivity on outcomes) than the current relatively narrow focus on leader responses.



The fit of proactive behavior with the task/strategic context is also an important influence on proactivity's outcomes; however, research on such factors is less common than studies focusing on the social and relational context. In our discussion of this aspect as a component of wise proactivity, we argued the need to assess whether change is needed (rather than, say, adaption), as well as the need to identify the "right" change given the context. Once again, there will be value in examining directly how an individual considers the task and strategic context, as well as the psychological processes underpinning such wise behaviors. We might—for example—predict that systems thinking, or recognizing how an entity operates within a larger complex system composed of interrelated parts that interacts with its environment (Katz & Kahn 1978), is important for considering the task and the strategic context. In turn, a dialectical thinking style (Peng & Nisbett 1999) might foster systems thinking, because dialectical thinkers deal flexibly with any apparent paradox or complexity by seeing "shades of gray." We could likewise identify situational aspects, such as intellectually stimulating leadership styles, that might foster systems thinking and hence enable proactivity that better takes account of the task and strategic context.

Meantime, research on self-regulation factors appears to be increasing, with several recent papers focusing on self-regulatory-oriented moderators of the proactivity-to-strain pathway (e.g., Creed et al. 2017, Rudolph et al. 2017, Strauss et al. 2017). The role of such factors for mitigating performance-oriented outcomes has been relatively neglected, as has the role of such factors in sustaining proactive action over the longer term. Our discussion of wise proactivity provides some pointers for extending this research, such as by directly examining the role of optimization and compensation strategies engaged in during proactivity. Effective self-regulation also likely requires high levels of self-awareness because, attending to, and being aware, of one's self will enable proactive behaviors that fit one's needs, values, and interests (Deci & Ryan 2002), and a self-aware cognitive state has been suggested as integral to wisdom (Staudinger & Gluck 2011). Therefore, although a future orientation is generally positive for proactivity (e.g., Parker et al. 2010), we might expect that wise proactive individuals are also high in psychological flexibility—having the ability to focus on the present moment and to either persist or change one's focus depending on situations (Bond et al. 2008), as these individuals are more likely to succeed in regulating themselves during proactivity, and hence more likely to achieve positive benefits.

One observation from our review is that most research on the outcomes of proactivity has focused on relatively short timescales. But it is important to understand the impact of proactivity over longer periods. We expect that wise proactivity might be especially important in enabling proactive action that is sustainable over the long run. When an individual is recognized as performing well because of their contextually savvy proactivity, while also experiencing positive well-being due to effective self-regulation, this experience is likely to create a positive spiral, fueling yet more proactivity. In essence, it is possible that wise proactivity will enable the accumulation of resources over the longer term, creating a positive learning spiral and leading to sustained career success. We recommend investigating such hypotheses, as well as the more basic proposition implicit in our article that wise proactivity predicts positive outcomes such as job performance beyond the frequency or extent of proactivity.

We also observe from our review that little attention has been given to the national-level context. First, with respect to task and strategic considerations, national-level factors such as the economy, national institutions and institutional regimes, and national culture will sometimes need to be considered in order for proactivity to achieve positive outcomes. For example, issue-selling in a socially democratic institutional regime (e.g., Sweden) will likely require active consideration of trade union interests, which is unlikely to be the case in liberal regimes that have limited trade union participation. Second, with respect to the social and relational context, national culture will potentially play a powerful role in shaping what sorts of interpersonal dynamics are most effective.

For example, issue-selling in a country high in conservative and authoritarian national values will likely require different interpersonal skills and processes than an open, egalitarian country. Our review identified only three articles in which cultural factors were considered, one of them being a meta-analysis on the effect of i-deals in Western versus Eastern contexts (Liao et al. 2016). This review suggested greater cultural similarity than differences, although more research is required.

Finally, beyond our recommendations for further research (summarized in **Table 2**), practical implications flow from our review and analysis. First, in parallel with key attributes of wisdom, it seems that proactivity is more likely to result in positive benefits (and less likely to result in negative outcomes) when proactive goal generation and pursuit are appropriate to the task and strategic

**Table 2** Future research directions for studying the moderators of proactivity, and for unpacking conceptual and empirical issues related to wise proactivity

Research direction	Description and examples
In relation to the key moderating factors: within and beyond the identified categories	<ul style="list-style-type: none"> <li>■ With respect to social and relational considerations, investigating social comparison processes for forms of proactivity beyond i-deals</li> <li>■ Further investigation of peers' responses to proactivity, beyond leader responses</li> <li>■ Further investigation of task and strategic considerations, which have been relatively neglected</li> <li>■ Further investigation of self-regulatory considerations, especially their moderating impact on proactivity-performance relationships</li> <li>■ Further investigation of factors not covered in the three categories of factors to assess their generalizability and possible wider application</li> <li>■ Consideration of national culture, as well as other national-level variables (e.g., economy), as factors relevant to the task and strategic context (e.g., the role of unions) and the social and relational context (e.g., different interpersonal norms according to culture)</li> <li>■ Considering moderators that have not yet been examined that relate to the notion of wisdom</li> </ul>
In relation to wise proactivity: measurement and construct issues	<ul style="list-style-type: none"> <li>■ Direct examination of the behaviors in which individuals engage when setting proactive goals and striving to achieve them</li> <li>■ Examining how individuals achieve "balance" across the different dimensions of wise proactivity</li> <li>■ Examining the empirical distinctiveness of wise proactivity compared to frequency/extent of proactivity, as well as the incremental validity of this concept</li> <li>■ Understanding the commonality and uniqueness in how wise proactivity is manifested and interpreted across different cultural contexts</li> </ul>
In relation to wise proactivity: antecedents, processes, and outcomes	<ul style="list-style-type: none"> <li>■ Theorizing and investigating the psychological processes (e.g., systems thinking, working self-concept, and self-awareness) that might underpin wise proactive behaviors</li> <li>■ Theorizing and investigating the distal dispositional and situational antecedents (e.g., humility, relational work design) that might drive wise proactivity as a result of their impact on psychological processes</li> <li>■ Examining the effect of wise proactivity (over and above the frequency or extent of proactivity) in predicting short-term outcomes (e.g., job performance, resource depletion) and long-term outcomes (e.g., career success, life satisfaction)</li> </ul>

context, when they are considerate of others and the social context, and when the individual is effective in self-regulation. Our analysis thus provides some key pointers for individuals who want to improve their success with proactivity, as well as for leaders, coaches, trainers, and others in organizations who have the opportunity to influence how proactivity is enacted. Second, from an organizational perspective, organizations should not only consider changing their systems, structures, and processes to promote higher levels of proactivity (such as via increasing job autonomy, or changing other such identified antecedents of proactivity), but also to put in place systems, structures, and processes to promote wiser proactivity. As a simple example, disseminating information to boost individuals' contextual knowledge will likely help to ensure consideration of tasks and strategy during proactivity.

Indeed, our review and analysis offers a different way forward for managing the “proactivity paradox” discussed earlier, highlighting that although proactivity is desired, only the proactivity that conforms to leader expectation is wanted. In order to ensure proactivity “fits,” organizations sometimes impose bureaucratic processes to ensure the proactivity aligns with organizational requirements. However, this control-oriented approach risks suppressing proactivity altogether (Campbell 2000). A control-oriented approach to proactivity attempts to reduce the unpredictability associated with proactive behavior when, in fact, proactivity is most necessary when operational uncertainty is high (Griffin et al. 2007). The concept of wise proactivity offers an alternative approach for managing proactivity—that is, via the cultivation of wisdom, rather than through introducing potentially stifling bureaucratic procedures or high levels of managerial controls.

## DISCLOSURE STATEMENT

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## Errata

An online log of corrections to *Annual Review of Organizational Psychology and Organizational Behavior* articles may be found at <http://www.annualreviews.org/errata/orgpsych>