A Work/Life Teeter Totter: Using Demand Based Principles for Spiritual Operations Management

Dan Bumblauskas  
*University of Northern Iowa*, daniel.bumblauskas@uni.edu

Paul Bumblauskas,  
*PFC Services, Inc*

---

**Recommended Citation**

[https://scholarworks.uni.edu/facpub/2166](https://scholarworks.uni.edu/facpub/2166)

---

This Conference is brought to you for free and open access by UNI ScholarWorks. It has been accepted for inclusion in Faculty Publications by an authorized administrator of UNI ScholarWorks. For more information, please contact [scholarworks@uni.edu](mailto:scholarworks@uni.edu).
The purpose of this article is to detail how spirituality is a critical component to work/life balance and how individual and organizational spirituality impact operations management. Balancing key areas of work and professional life become an important part of creating happy and mutually satisfying relationships. We have identified six critical elements of life balance that lead towards optimized productivity (in no order of significance): Career, Family, Community, Spiritual, Health (includes sleep), Pleasure. Spirituality is one of the six components that must be defined, with a corresponding work and personal development plan, at an individual and organizational and operations management level.

**KEYWORDS:** Work-life balance, workplace spirituality, religion / faith, competitive advantage, demand-based approach, family / private businesses

**INTRODUCTION**

The purpose of this article is to detail how spirituality is a critical component to work/life balance and how individual and organizational spirituality impact workplace culture and influences the consumer marketplace. Previous research has shown that relationships are paramount to happiness. Balancing key areas of work and professional life become an important part of creating happy and mutually satisfying relationships. We have identified six critical elements of life balance that lead towards optimized productivity (in no order of significance): Career, Family, Community, Spiritual, Health (includes sleep), Pleasure. We suggest this is both an analytical and subjective process. Since time is finite, it should be balanced based on the relative importance to the individual and their stakeholders.

Spirituality is one of the six components that must be defined, with a corresponding work and personal development plan, at an individual and organizational [family] firm level. Organization that are closely held, whether family businesses or not, tend to have better control over the influence of spirituality of the drivers of the customer experience. This is because public and larger companies are directed by laws and regulations that cause compliance to be a priority over choice in terms of how spirituality is conveyed as part of the presentation by the entity to its customers and others. Using a demand-based or demand driven modeling approach, there can be a better understanding of what level of spiritual engagement the organization should strive to achieve with stakeholders and customers. When there is a match between the individual (the
focal point of the demand-centric view) and organization, the synergy can create a company-defined competitive advantage, assuming this is also a match with the customer and end-user desires. Since the customer/end-user is the focal point of the demand-channel for the entity, a match between the stakeholders, employees and the customers/end-users will allow the organization to trend toward optimal results in terms of market penetration and satisfaction.

BACKGROUND

A team of academic researchers submitted a symposium proposal for The Academy of Management (AOM) 2019 Annual Meeting on the role of religion in the creation of competitive advantage in family firms. This topic has spawned various theories, hypotheses, research questions, case studies, and a journal special issue in an attempt to further understand the factors influencing the role of religion, which is a subset of the broader umbrella of spirituality, in creating competitive advantage. The difference between spirituality and religion is well documented as detailed further in the literature review below. There are anecdotal case studies of successful organizations that put religious and spiritual beliefs as a high priority and, in doing so, have influenced the competitive landscape of their industries. However, conversely, there are other cases in which firms have pushed religious and spiritual beliefs to the dismay and outrage of some audiences and consumers.

Whether spirituality and religion are catalysts, have any correlation, etc. in the competitive advantage of firms is highly debatable at least partly dependent on consumer demographics (i.e., how many customers exist within the same or similar spiritual belief structure). Spirituality is also just one of many aspects in which organizations can create competitive advantage, some of which have been previously studied, e.g., operations management, quality, sustainability, corporate social responsibility, etc. There is perhaps some alignment between these seemingly disparate areas, what we describe as the spirituality piece of the “teeter-totter” of work/life balance. From a demand-based perspective there must be synergy between the entity and the party they are attempting to influence for this to be a valuable tool. Spirituality, in and of itself, can be a catalyst, neutral or a hinderance. The primary scope here is family-run and privately held businesses that have fewer secular constraints than publicly traded companies do.

RESEARCH MOTIVATION

Over many years consulting in industry, a model was developed that accounts for six areas necessary to properly balance work and life as shown in table 1. One of those six areas is spirituality. Good health creates quality time, to be managed, and quality time is a pillar to successful management of resources and happiness. Longitudinal research has shown that relationships (personal, professional, spiritual, etc.) drive happiness (Mineo, 2017), so it comes to reason that we should allocate time to this area to create, perhaps, competitive advantages (for ourselves, our employees, our investors, our customer/end-users, etc.).

<table>
<thead>
<tr>
<th>Table 1. Six Key Areas ofBalancing Time and Stakeholder Buy-In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Six Key Areas for Work/Life Balance</td>
</tr>
<tr>
<td>A. Career</td>
</tr>
<tr>
<td>B. Family</td>
</tr>
<tr>
<td>C. Community</td>
</tr>
</tbody>
</table>
D. Spiritual
E. Health (including sleep)
F. Pleasure

Notes:
These six elements are not listed by priority and should be validated with stakeholders

In industry practice, it has been observed that the role of inputs, such as spirituality and/or religious beliefs, are a key area that should be considered when it comes to family businesses and their productive output of products and services. Therefore, our primary focus in this article is on the need to balance the spiritual component of our time, with a secondary focus on the impact of family business competitiveness. The spirituality component of the models and modules which have been developed for and within organizations must be differentiated from religion, Western or Eastern (Fernando and Jackson, 2006; Rastgar et al., 2012) and optimized in order to build successful personal and professional relationships. In doing so, competitive advantages or disadvantages, can be achieved.

Industry case studies have exemplified this and, in some cases, have been very controversial and polarizing, but many organizations and firms often consciously or unconsciously disseminate their spiritual beliefs in their governance structure and along to stakeholders and consumers. We define stakeholder(s) as a person or persons with an interest or concern to the individual balancing their time and efforts. It is important that there be a match between selling organizations, employing organization, etc. on a spiritual level. Once that match is achieved, the sum of the individual contributions towards the organization will create a competitive advantage as the entity defines it. This can also increase employee and end-user satisfaction. This is an analytical process that is based on subjective priorities. A spreadsheet or time management software can assist with this effort. Since we suggest a demand-centric approach, this means the individual is the focal point and they choose their stakeholder(s). This may include the business as a priority but need not. This also need not be religion, but religion is a common spiritual element.

The definitions of spirituality vs. religion are important considerations (Benefiel, 2003a). Spirituality can be defined a number of different ways, but we have focused on some of the often-cited definitions in our literature review below to validate and verify our interpretation. For our purposes, spirituality is a higher level personal and qualitative life purpose (e.g., macro-level or ‘37,000-foot view’).

It is fairly easy for non-public/non-regulated organizations to achieve consistency between ownership, management, other employees and even vendors & other stakeholders with respect to spirituality broadly and religion more specifically. After all, the ownership often chooses those that have similar spiritual views. However, there is at times a disconnect between the organization and its customers as they pressure a certain view with the assumption that there is an adequate market with similar view that will be able to optimize the value of the organization. Ownership imparting their spiritual beliefs upon employees, especially in family businesses is risky for operations. In addition, this is very supply-side focused, i.e., pushed on employees, rather than demand-side focused. E.g., we will start the meeting with a prayer without discussing if everyone finds that to be acceptable. Alternative approaches might ask if the customer would like to start a meeting with a prayer of their choice and/or the owner or senior management team could ask if everyone is comfortable with a prayer to kick-off the meeting.
Unless the organization adopts a demand-based view, the organization will not be able to anticipate the outcome of the spiritual pressure that is directly or indirectly applied. An example of direct pressure would be an organization, such as the controversial Chick-fil-A, that screens employees and possibly restricts hiring based on certain spiritual beliefs and the employee boldly sharing their beliefs to the public. This legal and constitutional rights argument is one that must be considered. Indirect pressure is a by-product of the uniform spirituality that is conveyed by comments such as “have a blessed day”- in other words it is tolerated by the organization typically because the organization may not have a balance of various types of religions and/or spiritual beliefs. Further there is a very narrow line between religion and certain secular evolitional developments- an example would be same-sex relationships and marriages. While these are gaining support in industry, spiritual and religious organizations sometimes correlate this with some level of consistency with their religious/spiritual views.

Should organizations place their spirituality aside in order to optimize results and the value of the organization or should the organization be a conduit for spiritual/religious change? This question is similar to questions faced by eco-entrepreneurs as these build businesses and organizations focused on sustainable operations. Today it seems that there is a quiet battle to decide what place spirituality has in business. Because family businesses are the ones that are often at the front lines, because they need not comply with all the regulatory pressures, they seem to be waging the battles in the field. Hence, they are the focal point of this research as it relates to competitiveness and spirituality. Another way to view this is that entities that focus on spirituality value spirituality over other objectives. From a demand-based perspective this needs to be validated as the correct approach given the product or service offering being made available. In some cases, the result will be positive, as least from the perspective of those that agree with the approach. However, the result can be neutral or negative- it depends on how the customer/end-user defines their own work life balance.

We suggest a simple approach. First, determine the work/life balance of the owner(s) or key influencers to the closely held or family business. If spirituality is important then step two is to determine if the demand channel has the same or at least a similar interest in spirituality. If they do, then spirituality influenced approaches can have a positive outcome. Third, structure the message and approach based on the customer/end-user view and the influencer’s view. Lastly, monitor results to assure that the results are a match with expectations. We caution that having spirituality high on the owner/influencer priorities in no way guarantees that spirituality initiatives will have a positive outcome. This needs to be validated from a demand-based perspective and preferably before the spirituality-based initiatives are activated.

LITERATURE REVIEW

Wong and Vinsky (2008) document the separation of spirituality and religion in the literature and applying their methods in the field of social work. They rely heavily on the work of Canda and Furman (1999) who define spirituality and religion as very different things. Other contemporary definitions seemingly reinforce the definitions from the Wong and Vinsky (2008) and Canda and Furman (1999) studies (Divine Intelligence Institute, 2017; Sheldrake, 2009). Others, such as Deepak Chopra, have popularized spirituality in the mainstream media and society.

The University of British Columbia (UBC) Centre for the Study of Human Evolution, Cognition and Culture (HECC) Cultural Evolution of Religion Research Consortium (CERC, https://hecc.ubc.ca/), Heinrich et al. (2010), and Iannaccone (1998) have laid the foundation for much of the work in this area, some of the latter more-so in the area of religion and economics.
Nadesan (1999) looked more closely at religion and corporate capitalism while Conlin (1999), Overell (2003), and Porth et al. (1999) are cited for originally connecting religion with organizational performance and competitiveness. Others have expanded upon this foundation (Dyck, 2014; Tracey, 2012) and Tracey et al. (2014) note the lack of research in this area despite religion’s prevalence in societies. It is actually amazing that the field of religion and spirituality in organizational performance is so young compared to the long history of organized religion. Epstein (2002) also notes the need for more consideration of religion in management education, others have aligned religion history and business ethics (Bay et al., 2010; Graafland et al., 2007), and Dyck and Wiebe (2012) consider salvation and organizational management theory.

Fernando and Jackson (2006) conducted an interesting study in Sri Lanka looking at the impact of religious connection in management decision making outcomes (i.e., what impact did religious connectivity have) while Rastgar et al. (2012) did a similar study in Iran. Benefiel (2003a, 2003b, 2005) and Benefiel et al. (2014) examine various aspects of spirituality and organizational research and science. Dent et al. (2005) make use of a robust review of the literature to more deeply explore the relationship between spirituality and organizational / workplace leadership and Fry and Matherly (2006) leadership transformation. Balog et al. (2014) look at the links between entrepreneurship, religion, and spirituality. In the end, all of the literature seems to suggest the need for further theory development and empirical research in this area. The concepts and theories in this paper are based on many years of management consulting in industry and academic research work.

METHODS AND RESULTS

The model framework and case assumption we are making is that family firms are not public, not covered by discrimination laws, etc. Individuals and family firms focused on balancing spirituality, therefore, align with the definition and assumptions provided in previous sections. Understanding the demand channel is key to all of this (Bumblauskas, Bumblauskas, Sapkota, 2017). For example, if a firm wished to promote their spiritual or religious beliefs in the marketplace, to stakeholders, etc. demand chain management would focus on consumers requesting or ‘demanding’ that the firm exude spiritual or religious principles and foundations in their business operations. The question here is whether companies force religion and spiritual aspects into the marketplace or if this is being driven or requested by the consumer.

One research question is whether spirituality and religion could be used to create a competitive advantage or disadvantage – technically, these elements could be perceived by consumers to be neutral, positive or negative. There seems to be the notion that perhaps there is some form of isolation of mutual exclusivity present with spirituality, religion and competition. As some businesses may choose to focus on spiritual or religious beliefs, similarly some organizations may focus on environmental sustainability, which businesses would want to leverage in order to create a competitive advantage by utilizing spiritual themes. These themes will then yield a positive, neutral or negative reaction from the consumer. To further expand upon the example of a restaurant or consumer goods store that promotes spiritual and/or religious sentiments, boycotts of the firm could ensue. This situation would then include those opposed to the boycotts that support the firms’ spiritual or religions foundational principles, those ‘grey-area’ consumers who are indifferent to boycotts or support of the firm, and the detractors of the firm who are adamantly opposed to the spiritual and religious messages.
Our conceptual belief or hypothesis is that management teams and ownership should not focus on using religion, solely, to create a competitive advantage, but rather communicate their spiritual views and positions as they see fit (by first creating a balance around the six key areas, including spirituality, as listed in table 1). This also reigns true with sustainable practices across countries of operations – e.g., being focused entirely or solely on environmental sustainability may or may not align with consumer demand-based drivers of success (Bumblauskas, Bumblauskas & Rosol, 2018; Bumblauskas, Bumblauskas & Sapkota, 2017). Demand driver identification can be further accomplished by aligning supply channel management with the consumer expectations, creating positive benefit via demand channel management. In any case, you may have certain spiritual and/or religious denominations or groups present which can be polarizing and distracting to business enterprises focused on creating competitive advantage for their firm.

Revisiting our restaurant or consumer goods retailer case, the ultimate question could be whether their customers like the products/services, spiritual/religious messaging, the scripted customer service operations protocols (e.g., “have a blessed day’), and/or the combination of themes used by the firm. It is also important to consider how this affects hiring and whether certain employees want to, or do not want to, work for an organization based on their spiritual and/or religious beliefs and affiliations. I.e., will top employees work for the firm(s)? We have witnessed some firms so embattled in the United States court system over such issues and positions that it arguably creates a competitive disadvantage (Marshall, 2012; Morrison, 2013). This may be in the form of a societal and legal disadvantage rather than an overall financial disadvantage.

DISCUSSION AND CONCLUSION

Our general belief is that you need to balance across our six key framework areas, which include spirituality and/or secular business practices. We also believe organizations need to avoid unilateral decision making, for example by consulting only management rather than making potential rash and uninformed decision without consulting stakeholders (specifically customers using the demand-based approach). Examples of this could be embarking on hasty military deployments, going to church on specific days of the week ‘or else,’ etc. without getting buy-in from demand-based constituents. Individuals and businesses should be able to prioritize and evaluate the highest return on investment activities based on their own criteria. This can lead to potential conflicts, such as how do we define what is a competitive advantage and how does it align with spirituality and religion?

One question that remains to be answered is whether religion, solely, creates a competitive advantage in family firms, and we are interested in the further development of this research line to prove or refute this hypothesis. In this case, religion must be a demand driver so the correlation would tend to be coincidence. If the company only monitors positive outcomes, incorrect conclusion can be reached. There are cultural overlaps as well that often align with religion such as treating people fairly. For example, does controlling your medical service offerings based on beliefs really provide a competitive advantage or hindrance to business and management? In one recent case detailed by Newhoff and Jamison (2018), agnostics vs. Catholics might view this very differently in terms of the services being offered and not offered to customers, or in this healthcare case, patients. Can businesses create a competitive advantage by switching their religious positions, beliefs, and affiliations? Religion is one subset of spirituality in our model. Another example would be individual people from different religious
organizations coming together as a couple and their need to balance their spiritual, personal and professional activities (e.g., Jewish and Catholic individuals marrying).

Here we have highlighted some examples from models, management consulting, and industry case experience. More research should be conducted to validate and verify the conceptual theories and hypotheses presented herein. This is a challenging and complicated topic which tends to ‘strike a chord’ emotionally in a positive or negative way, with consumers and readers. At the end of the day, individuals, organizations and firms need to decide how to best balance the spirituality “teeter-totter” of life balance and how it impacts their operations management strategy.

REFERENCES


