

Strategic Alignment of Personal and Organizational Vision and Values: A Vedic Perspective

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Abstract

This paper focuses on the alignment of personal with organization vision and values, taking a Vedic perspective, which is a strategic perspective for suitable organizational development. This perspective enables us to dip into ancient Hindu philosophical text to learn about the alignment of the “True Self Within” – the atman with God. With this spiritual orientation the basis of alignment is explored through two key concepts of sacrifice and duty, whereby alignment is likely to lead to inner harmony between the Atman and God, whereas misalignment naturally leads to emotional and material discomfort. Brief use is made of the dialogue between Arjuna a warrior and Lord Krishna, his mentor, taken from the Bhagavad-Gita, to illustrate how one might overcome emotional turmoil when faced with an inner conflict between duty and responsibility. The discussion attempts to bring back the journey through a small slice of the Vedas to modern management and puts forward the suggestion that leaders and managers should construe the search for meaning at both a personal and Organizational level if they are to find alignment and success.

Keywords: Vision, Vedic perspective, Bhagavad-Gita

Introduction

The importance of vision and values, to align personal goals with those of the organization was highlighted six years back in the cover story of Business Week¹. Newly appointed CEO (Barrett) at Intel is tasked with turning around a business that is in trouble but with a long track record of success. The success was delivered through a focus on a single vision “Intel inside” and clarity of insight into the role and impact of technology. Recent changes in strategy led to Intel playing the role of venture capitalist and diversifying outside its core business of designing and making microchips. However, Barrett says, “his strategy has not created a company without focus”.¹ Here is a good example of a “blue-chip” company where the business leader is attempting to take the organization into new directions to sustain its growth. His personal vision and values are, for the moment, at odds with the market and indeed the ability of the organization as a whole to align behind his vision and values. This is just a single illustration of a situation that plays out on a daily basis for business leaders in almost all organizations and is the subject of much research manifesting itself in papers such as the theory of the business² in which the author suggests that what “underlies the current malaise of so many large and successful organizations worldwide is that their theory of the business no longer works”¹. A theory of business is based on a deep understanding of what the business is capable of doing and having clarity of assumption about the market place. This theory needs to be known and understood throughout the organization.

How then does one motivate people to align with the theory of the business? According to Herzberg (1968) one does not use the carrot or the stick because in both cases the people are moving to the leader’s motives. Instead one has to work towards getting people to want to move towards the common vision. In organizations this implies a major role for the leader to build an environment in which people will want to align with the vision and value. There are likely to be barriers to ethical actions and such barriers can be overcome through spirituality. For example there are people who play games in their organizations, with academic and scientific research being carried out to gain personal rewards through publication rather than to serve “truth” and “society”³.

A vision provides the context, the reason for going in a certain direction, while the values and core purpose provides the reason for vision. When NASA (National Aeronautics and Space Administration) had its vision to put a man on the moon, it provided a strong sense of vision in a few words. But there was reluctance to hear the truth when one of its staffs was trying to point out a defective “O” ring that eventually caused a disaster. This example highlights the dissonance that can set into an organization when individuals are

International Journal of Interdisciplinary and Multidisciplinary Studies (IJIMS)

marginalized. Even worse, individuals that stand up to a claustrophobic culture can be labeled as “whistleblower” as if this can change the nature of the truth. The question then arises if people can ask the impossible questions in organizations and if they are aligned with a deeper sense of purpose that allows them to question the superficial in the organization. At the entrepreneurial level there is limited that leaders are driven as much by their ethical beliefs, their values as they are by a vision. The daily experience of dealing with opportunities, challenges and routines often dulls any sense of vision or strategy and this leads to a lack of clarity between how strategy and tactical behavior align with each other. Individuals are distracted and begin to lose any sense of vision that might have been there, instead growing the business on basis of personal values ⁴.

Human Values and Spirituality

The arguments put forward in strategy and management literature generally (as above) are that leaders need to provide a sense of direction and purpose. It is also suggested that values of individuals and organization need to be in harmony if people are to “want” to move towards the vision. In this context, a definition of values needs to include spirituality because the alternative is a secular or philosophical explanation, and not always satisfactory, for example when someone says, “because that is the way I am” ⁵ as a reason for action or in action. In other words, neo-classical economic assumption that suggest that humans are rational beings whose only concern is to maximize profit limits the possibilities of aligning personal with organizational goals ².

Indeed there is growing recognition of the limitations of assuming that people are just economic “resources” in terms of the implications for theory in economics and also the impact on people where technology, global competition, downsizing and reengineering have created a workforce of employees seeking value, support and meaning in their lives.

Spirituality

Spirituality, made from the word “spirit”, which means “sense of deep self”. Spirituality, in wide term includes beliefs in supernatural powers, as in religion but the emphasis is on personal experience. It may be an expression for life perceived as higher, more complex or more integrated with one’s worldview, as contrasted with the merely sensual ¹. The term “spirituality” is defined as the inner experience of the individual as evidenced by attempts to harmonize day to day life with the beyond. Although this definition borrows from religion, the definition is not synonymous with spirituality, because religion draws on adherence to **dogma**, the practice of rituals and depends on faith. Spirituality has more to do with life’s deeper motivations and an emotional connection to God ⁶.

The search for spiritual meaning through a Vedic perspective is related to the journey each individual makes to that inner-self, that is free from the physical or material world. There are two Vedic perspectives on this journey, where one is about the alignment or harmony between the soul and the God while the other is that they are one and the same. But, the end point of spirituality is that the purpose of seeking a deeper meaning to oneself is to align with God or to seek oneness with God. A cynical perspective to the growth of interest in spirituality in an environment that equally worships capitalism distracts from the core point that people are searching for meaning to their lives and thus to develop an alignment between personal and organization goals. This issue of alignment between the “what I am” and the “what I am needed to do” is certainly not a new issue, especially if one dips into ancient religious texts. In particular, this paper seeks to develop an exploration of Vedic literature on this issue of alignment, first by defining the Vedas, selecting two values; sacrifice and duty to see how these help with aligning personal and organizational goals and values. The issue of alignment is further developed through the voices of Arjuna and Lord Krishna, from the Bhagavad-Gita in the popularized version of the debate around duty and sacrifice. Finally, the discussion attempts to draw out the issues of alignment at different levels of purpose and motivation and how these might relate to contemporary management.

Vedic Perspective

The Vedas are the oldest of mankind’s works on philosophy, predating the earliest Greek works. They are said to have been compiled from an oral tradition by Vyasa into a major set of hymns concerning themselves, through four major works, with all aspects of life in terms of peace, prosperity, liberation (Rig Veda); sacrificial rituals and rites for prayer (Yajur Veda)⁷; the use of chanting and music for these prayers (Sama Veda) and the practical application in the arts, science, medicinal secrets and explanation in the nature of life and time (Atharva Veda). There are a further four Vedas dealing with preventative medicine (Ayur Veda), military sciences (Dhan Veda), performing arts (Gandarva Veda) and technology in the broadest sense of the word (Staptya Veda) Brahma.

International Journal of Interdisciplinary and Multidisciplinary Studies (IJIMS)

The Rig Veda is considered to be the seminal work with several chapters, the last being of particular importance and indeed relevance to this paper. This last chapter is known as the “Vedanta” (Veda = knowledge; Anta = end) and is revered by Hindus as the highest expression of truth, seeking to travel into the very depths of the soul in search of God-realization and self-realization. The Vedanta is also called the Upanishads, which develop the philosophy for the identification of the Brahmin – the spirit that maintains the universe with the Atman, the eternal spirit that maintains each individual.

This paper is in danger of missing the richness and depth of the Vedas by having to focus on a narrow use of the text to explore and relate to the modern world of management. With this caveat in mind the rest of this paper develops the idea of sacrifice and duty, both of which are very important to an understanding of the Vedic (or Hindu) way of life. After setting out to define these terms, the paper explore these issues through the parables set out in the Bhagavad – Gita, itself a subset of the Mahabharat.

Sacrifice

The central meaning of sacrifice is that an individual is willing to give up a material sense of existence to achieve union with God. Since the Atman – the true self within – is the thought to be eternal while the mortal body is just the clothes worn by the spirit the essence of sacrifice all material attachments to objects and also to certain emotions such as fear, jealousy and desire. A strong pull towards desire can lead to a fear of failure and also to jealousy and bad feelings if the desire is not achieved ⁸. At a deeper level, sacrifice at a material level is not thought to be sacrifice at all, since the only true self is defined as “The Atman”, which is thought to be eternal and since this is not something that can be sacrificed the belief is that the loss of material possession and the clothes worn by the Atman are not really a sacrifice.

Duty

This concept of sacrifice leads to a discussion on how one can reach the inner self – the Atman – and what duties need to be performed that qualify as sacrifices along the way. The concept of Duty is therefore defined at many levels in Vedic literature.

Duties according to personal goals and motives are presented in a tabular form below:

Personal Goals	Motives	Activity
Kama	Tamasik	Seeking pleasure at a base, Material level.
Artha	Arthic	Seeking knowledge.
Dharma	Rajasik	Performing ones duty with a strong goal orientation.
Moksha	Satvik	Seeking to do ones duty to God without seeking results. Pursuit of salvation.

These personal goals are described in a hierarchial way as they move from a material pleasure – seeking motive and actions through to a higher – level pursuit of salvation. The movement of personal search for meaning then, also needs to rise from the Tamasik to the Satvik with the associated sacrifices⁹.

There is a further layer of discussion with respect to duty and this is at a dependent level. This allows for a degree of flexibility in the way one responds to the duties.

International Journal of Interdisciplinary and Multidisciplinary Studies (IJIMS)

Duties according to stages in life are shown below:

Brahmacharya	-	as a student, the duty is to focus on study and the pursuit of knowledge, learning from the Guru.
Grahatsya	-	the Householder, the duty is to ensure that the family is cared for through the pursuit of welfare and material comfort.
Vanaprasthya	-	as an individual who has retired from the role of householder, the duty is to prepare the ground for a more satvik existence.
Sannyasa	-	when all material duties are complete the individual is free to pursue Moksha.

Duty is then discussed at a final level as responsibility to others. Thus one has to reflect on duty in terms of personal goals and motives, reconcile some of these according to stage of life and finally reflect on our responsibility within society as well attend to our duty. At the core is a duty to our self, at a physical well-being level, where if we are not able to look after our bodies then we cannot be of much use to others. Hence pursuits such as Hatha Yoga, meditation and self-discipline. Our next duty is our responsibility to take care of the family as an extended unit. We have responsibility as parents, children, siblings, family elders and others. Each has a particular responsibility at a physical well-being level as well as within religious rites and rituals. Beyond the individual and family the next layers include society, national and mankind, taking in responsibility to a wider community, which begins when you step outside the house. The key concept is one of sacrifice for a wider Dharma. This comes with a code of conduct including the refusal of unnecessary gifts, modesty, gentleness, kindness and compassion, peace of mind through self-control, forgiveness and purification of body and mind.

When the Vedas were compiled there were no commercial organizations of the kind we have today so any connection made between Vedic perspective on spirituality and modern management needs to involve a discourse and interpretation. Society did have a caste system that allowed for teachers (Brahmins) Kings and soldiers (Ksatryas) the early Vedic literature these roles were descriptive of personal qualities, but over the millennia they have become part of an inherited class system and is more a distraction to the interpretation of Vedic perspective of personal goals and values than they are helpful¹⁰.

The same compiler of the Vedas (Vyasa) is given credit for scribing a major epic of 1, 00,000 verses called the Mahabharatha, within which is, contained the Bhagavad-Gita. This epic is thought to contain every emotion, action, values, illustration of morality and ethics. The story is of two sides of an extended family becoming engaged in war. One of the figures – Arjuna is a worrier whose family has been wronged. He comes to the battlefield to assess the situation and on seeing his opponents, crumbles into moral and emotional turmoil. He cannot see how the spilling of blood of his family, former teachers and friends is a price worth paying Mascarato.

Discussion

This paper set out a brief review of management literature that signals the importance of a vision and set of values to help align the top management team and the employees so that the organization can succeed. There has been considerable research into the area of employee motivation., especially when they are seen as an unthinking resource. A significant point is made by Herzberg that in using the carrot or the stick to motivate people we only move them to meet our motivation. People, he says must want to do something.

The implication of this statement is that individuals need to align with the vision and values of the organization if they are to “want to” take any of the actions needed of them. At this point the paper set out to explore a tiny fragment of Vedic literature and used the popularized version through the Bhagvada-Gita to explore duty, emotions and detachment so that the warrior – Arjuna can begin to reconcile the task ahead of him with his own personal sense of vision and values.

The Bhagavad-Gita also provides us with an insight into the whole issue of motivation of an army, and how and why some soldiers will give more of themselves than others.

International Journal of Interdisciplinary and Multidisciplinary Studies (IJIMS)

How does this relate to a modern organization?

“A leader needs to know where the organization is now, where it wants to go and how it will get there”. These words capture the thoughts of Peter Drucker who also puts forward the need for leaders know the “theory of the business” or vision. In other words what is the purpose of the organization, its Atman if you will? At a shallow level it is merely to provide financial results and rewards to shareholders and in a Vedic sense this would be defined as Kama with a pretty meaningless (Tamasik) set of motives and outcomes (bottom-line mentality)¹¹. Here competitive games are played out among its managers, competitors, suppliers and customers with a fuelling of the ego at all levels. But, in essence the organization has no sense of direction. It enjoys the good times and mourns the bad times. At the next level up, where business might be based on a stronger set of competences or knowledge base, leaders demonstrate a will to get to their targets and some of these are of a financial nature, but on the whole one might describe them as being focused on the application of what they have learned. Many of today’s technology or knowledge-based enterprises can be linked to this level of “Rajasik” motivation. Recent success and failure on stock markets capture the meaningless from the more focused business, for example lastminute.com and amazon.com have survived where others who entered the market on a speculative basis have gone out. At the highest level of “self-actualization” leaders need to provide a vision and set of values that have deeper meaning if they are to motivate people to work when the short term material loss can deflate their resolve. As we see from the dialogue between Lord Krishna and Arjuna, this can be a difficult goal to achieve because the leaders own resolve can be shaken when faced with a difficult decision. This hierarchical view is captured in the illustrative table below as a way of demonstrating how the organization and the individual can become aligned at their own levels.

Organization vision and values Personal vision and values

Basic level of motivation with unclear sense of purpose

Individuals with no aspiration or sense of direction
(**Tamasik**).

An organization with clarity of knowledge and purpose

People who understand what the theory of the business is all about (**Rajasik**).

An organization with a clear vision of how it will impact on society, its responsibility

People who are motivated by a higher sense of purpose and understand their duty
(**Satvik**).

The implication of the table is that where people and organizations are out of tune at each level they will not be aligned. For example a person who lives a tamasik life will not fit comfortably with an organizational that operates at a **satvik** level. And the same analysis will apply at all three levels. In other words, where the “True Self Within” is not aligned with the purpose of work we see a lack of contentment and dysfunction at an emotional level. Finding a level at which one is aligned provides for a degree of contentment.

But, the Vedic perspective would argue that the individual and the organization both need to align at a higher level in search of the True Self to find genuine harmony. In other words, where the leader is motivated by and working towards a physical material satisfaction (tamasik) there is no real scope for spirituality. It might come later. Similarly, even if individuals are working towards their personal search for meaning if they happen to work organizations that might be labeled as tamasik, (e.g. gambling, tobacco etc.,) here again one finds a delayed journey and disharmony.

A question that arises from this notion of hierarchical levels of alignment is whether alignment of personal and organizational goals leads to spirituality or whether the journey towards the inner self leads to alignment. This is a complex question, which in the Vedas is answered through setting out the highest goal (of finding oneness with God) and developing the pathways to reach that goal through sacrifice, duty and other values. The concept of being detached from the material in order to reach the spiritual underpins this Vedic perspective.

International Journal of Interdisciplinary and Multidisciplinary Studies (IJIMS)

Therefore, in the contemporary context it is necessary to consider the highest goal of the individual and the organization and apply the test of duty according to our responsibility to stakeholders. The more aligned the leaders is with the organization (and thus other individuals within) the greater the likely success of both in achieving harmony of goals and values.

Contemporary Indian management literature is growing to bring about greater understanding of how the Bhagavad-Gita (as the popular version of the Vedas) might relate to modern and successful management. Meanwhile this paper has made a bold attempt to develop a Vedic perspective to the issue of aligning personal with organization vision and values. The main lesson for contemporary leaders and managers is to construe this journey to the inner self (in their search for meaning) at two levels and attempt to bring about a confluence of these levels.

The first is their own individual search for meaning and secondly to consider their organization as if it too has a spiritual journey. In this way the higher purpose of the organization will always guide the behavior, the ethics, the system and the nature of people joining the organization to give it deeper meaning with its stakeholders. Similarly the higher purpose of the organization and this search for meaning both at a personal and organizational level may be a better way forward than to separate out the spiritual journey of the individual from the “bottom-line” purpose of the organization. In a modern sense this perspective relates to how an organization needs clarity of purpose and values (the theory of business) in order to achieve success. Similarly individuals who are more concerned with higher order purpose and thus align their behaviors to match are more likely to find inner harmony than if they play at games at a “tamasik” level. So, the Vedic perspective would suggest that not only should there be higher purpose and values for both the organization and the individual but that these need to be synchronous with each other. The challenge for leadership is to define these goals and enable people to realise them. This is not a new challenge, as shown by some of the earliest Greek philosophers, such as Plato who was convinced that the only way to deal with corruption and violence of Athenian politics in his time was through philosophical and ethical enquiry, to merge political leadership with a philosophical base to deal with societal problems. His journey led him to investigate the nature of the soul, its character and survivability in the face of badness, injustice and rewards for goodness, both in this life and the next one.

Conclusion

The current academic literature on management is spirituality is thought to be weak and outside the mainstream. Most books and articles tend to be popular works without a theoretical or empirical base as we understand it in modern management. Some of the major works in the field are limited to a spiritual or religious tradition. It is hoped that the discursive style of the content of this paper can readers understand that there is much to be gained from a different and ancient philosophical school in the emerging literature on spirituality in management. In synthesizing the Vedic perspective a tentative effort has been made to link the ancient with the modern through figures and frameworks. This might provide an opportunity for future empirical work in the area. It might also highlight that there has been very little that is new for a very long time.

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