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INTEGRATING A BIBLICAL PERSPECTIVE IN THE PROFESSIONAL CONSULTING PRACTICE OF RETURN ON INVESTMENT (ROI)

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Return-on-Investment (ROI) is a decision-process. The objective is to render a decision about the amount of investment one must allocate up front in hopes of making a larger return later. When estimated total returns exceed total costs, leaders consider the ROI metric beneficial. Although it is not a perfect process, leaders can apply one of three models to filter their data when formulating their decision. The first model considers the consultant's decision-making process related to capturing new billable work. In this model, the preponderance of the assessment focuses on the upfront investment. The second model, often experienced when government agencies receive grant funding and the decision-making process is not predominantly influenced by money, the concept shifts to assessing the returns or the importance of the outcomes or products. The third model, which the author is proposing, is based on a Biblical perspective, considers the work within the context of the consultant-client relationship, as this aspect is paramount to achieving project success. This model suggests when Christian leaders evaluate ROI based on motive, trust, partnership, and elements that denote being yoked together they are more likely to predict future success.

I. INTRODUCTION

A consulting practice is comprised of offerings that come in the form of leaders' skills and competencies that provide a service, develop a product, or shape a strategic initiative.[1] As such, companies are likely to hire consultants when they do not possess the in-house resources to address their needs or when they desire an external perspective.[2] However, these "offerings" by themselves are not enough to entice clients

[1] Sukhraj, R. 2016. *31 Examples of Value Proposition Statements.* June 16. https://www.impactbnd.com/blog/10-value-propositions-you-wish-you-had.

[2] Greiner, L., & Poulfelt, F. 2005. *Management Consulting Today and Tomorrow.* New York: Routledge: Taylor & Francis Group.

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to select a consultant. What is needed is a partnership-oriented relationship that is focused on developing a value-based return.[3]

Yet, to be successful, a consultant must possess specific character traits to achieve this client dynamic. For example, consultants must possess emotional intelligence, flexibility, and insight; embody business acumen to ensure profitability;[4] and be highly proficient in project management.[5] Part and parcel to developing a value-based return is a thorough understanding of and ability to assess return on investment (ROI) for both themselves and for their clients before engaging in the work.

ROI, in the most basic terms, is a decision-process. The objective is to render a decision about the amount of investment one must allocate up front in hopes of making a larger return later (e.g., 5% investment for an 18% profit).[6] Consequently, when total returns exceed total costs, net gains are positive and the ROI assessment is considered beneficial.[7] Yet, thinking about ROI only in terms of money is lacking, as the measure itself does not account for risk, value, or future opportunity, nor does it assess the most important element in the consultant-client relationship likely to predict future success—trust.

In addition, the ROI concept takes on a different meaning for each type of end user—sole proprietor, mid-cap for-profit corporation, or research and development firm. It also takes on a different meaning depending on which side of the table you sit on—consultant or client. Thus, the focus of this paper will be to expound on the ROI concept, as well as, introduce how integrating a Biblical perspective into the ROI concept expands its meaning and offers more effective assessment criteria to determine if the proposed consultant-client relationship will be profitable.

II. THE CONSULTANT ROI MODEL

As part of a consulting practice, ROI assessment is particularly helpful when considering whether to engage in a new business venture, project, or partnership as well as when considering the appropriate expenditure of overhead dollars intended to improve an internal business process. Most commonly, consultants apply an ROI decision-making process to calculate the level of effort those in the organization must expend (1) to develop a proposal and (2) to conduct the work if won. The Australian Queensland Government uses a deliberate process, whereby leaders progress through a series of ROI "decision-gates".[8] Initial gates typically involve a strengths, weaknesses, opportunities, and threats (SWOT) assessment. Mid-level reviews involve greater analysis regarding financial parameters (e.g., potential win amount) and technical contracting parameters, such as the period of performance, contract type,

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[3] Dingus, R., & Milovic, A. 2016. "All About That Value: A Value Proposition Exercise for the Professional Selling Course." *Marketing Management Association Fall 2016 Educators' Conference Proceedings* 41-44.

[4] Cabrera, A., & Unruh, G. 2012. *Being Global How to Think, Act, and Lead in a Transformed World.* Boston: Thunderbird School of Global Management.

[5] Wysocki, R. 2014. *Effective Project Management Traditional, Agile, Extreme 7th Ed.* Indianapolis: John Wiley & Sons Inc.

[6] McKnight, W. 2010.

[7] Ibid.

[8] Queensland Government. 2017. *Gateway Reviews (Assurance).* https://www.treasury.qld.gov.au/projects-infrastructure/initiatives/gateway-reviews/index.php.

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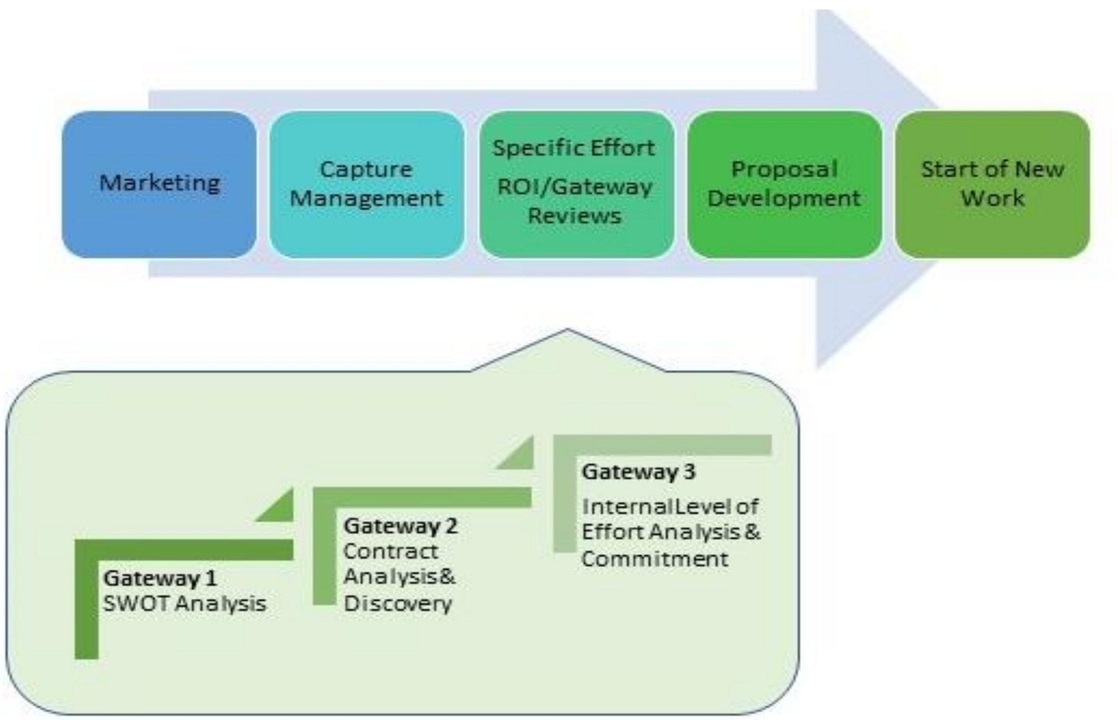
work location, equipment, overhead expenses, and other aspects that influence the financial bottom line.[9] Depending on the type of anticipated win (e.g., becoming an accepted vendor on an Indefinite Delivery Indefinite Quality contract vehicle, or, achieving an actual Task Order win to perform the stated work) and the size of the upfront investment, leaders will determine the number of gates and level of detail they need to render a decision to fully commit or not. The objective of the ROI process is to lessen an organization's risk by providing decision-makers greater clarity before they obligate their resources.[10] See Figure 1 below.

Figure 1: Typical Consultant ROI Process



In some organizations, the ROI concept is simpler. Leaders merely consider practical matters such as—can we do the work; can we create something of value with the amount of money the client has to spend; would we be pleased to have our name associated with the work; and can we make a profit. The problem, as Swanson (2011) suggested, is ROI is mostly assessed within a financial framework, which is too "myopic".[11] Leaders can overlook the value of projects in areas such as human resources, customer satisfaction, and reputation. Also, it is possible that the financial

[9] McKnight, W. 2010.
[10] Zareba, I. 2014. *Strategic and Financial Drivers of Business Value Creation.* Poland: Wyzsza Szkola Biznesu- National-Louis University.
[11] Swanson, S.A. 2011. "All things considered." *PM Network* 36-40.

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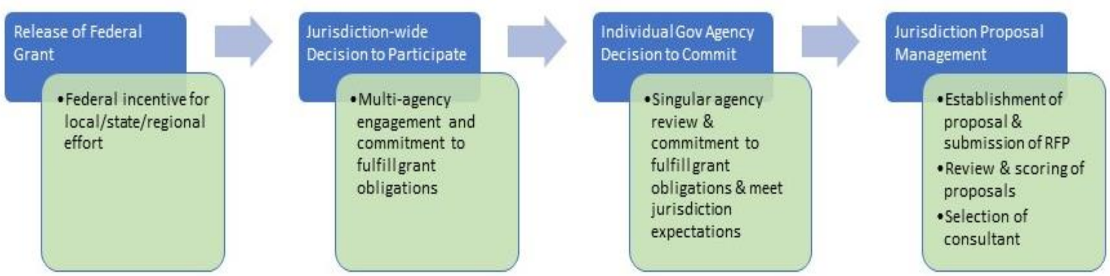
estimates can be wrong.[12] Yet, despite this possibility, many like Heerkens (2011) suggested consultants should not throw out the ROI process simply because people can misapply it, as there is value in engaging in an activity using dispassionate criteria that are reviewed by dispassionate leaders,[13] as it helps leaders avoid bias and possible blind-spots in their thinking.[14]

III. THE CLIENT ROI MODEL

In addition to the consultant's practice, clients must also engage in an ROI assessment. If their organization is expending its own funds, much of the ROI decision-making mimics what was formerly stated. Yet, when a client receives federal grant dollars, the ROI concept shifts, as an organization does not need to prove it will make a profit. Rather, the client must ensure they will produce a specific outcome for a set amount of money. Similar to consultant decision-making, clients are likely to go through a series of steps that help them achieve clarity regarding roles, responsibilities, and desired end-states. See Figure 2 below.

Figure 2. Local/State Government ROI Process



The assessment may entail a jurisdiction-wide decision process, depending on the grant (e.g., disaster response preparedness). At some point, however, the individual agency must conduct an internal agency review and decide if they are willing to meet the jurisdictional obligations, in addition to federal/payor obligations, as well as their own agency's obligations. Whereas the consultant's efforts lead to a decision to put forth resources to bid on a proposal, the client's efforts clarify what it is they want to achieve. In most cases, the clarity the client gains about their desired end-state helps them identify written contract specifications and establish an effective means to review, score, and select a contractor or vendor. Although there are variations to both these models, be the work internally or externally oriented, ROI is about accumulating an

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[12] Ibid.

[13] Heerkens, G. 2005. *Project management: 24 lessons to help you master any project.* New York: McGraw-Hill.

[14] Bazareman, M.H, & Tenbrunsel, A.E. 2011. *Blind spots.* New Jersey: Princeton University Press.

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extensive amount of information to justify either money or effort in anticipation of gaining either future revenue or value.[15]

IV. THE BIBLICAL ROI MODEL

Whereas consultants boil down the process mostly focusing on investment, with a modicum of concern for opportunity and reputation; and the client engages in a process that helps them clarify their desired return, the ROI concept takes on broader meaning when applying a Biblical perspective. As per the Apostle Paul, stated in 1Corinthians 6:20, God created a way to redeem mankind so that their sin would be forgiven. This approach would not only save man from his own failings, faulty thinking, and selfishness, but, would accomplish the task without compromising or diminishing the triune God's holiness or characteristics of righteousness and justice.[16] In terms of ROI, as Stowell (2017) suggested, God fully invested in man, yet, unlike the consultant's or client's practice to compare what their organization will gain, God invested Himself entirely in man with no requirement that man should provide a return. Perhaps this is easier for one to do when they (i.e., the triune God) possess unlimited resources. However, given this truth, the ROI concept now broadens to include aspects of motive. Why would a holy God care about redeeming sinful man to Himself, particularly since His glory is not based on the number of those who choose to accept His gift of redemption?[17]

As it applies to ROI, the consultant must then consider his/her motive and his/her client's motive. As Willard (2002) suggested, "we live from our heart"[18] and even Jesus said, "out of the heart the mouth speaks" (Matt 12:34); thus, others will intuitively discern one's motives before entering into a relationship. Furthering the importance of motive, Block (2015) conveyed, "people want to connect first and then deal with content second".[19] Hence, to assess motive requires a sharing of who each person is, which is a culmination of words, actions, and stated motives, that reflect his/her values.

Second, in the Biblical model, mankind must trust that God can and will do all the investing. He must trust God will provide and he must trust God will not act capriciously and change the rules.[20] With trust, mankind can enter into the relationship by accepting that God fulfilled the requirement and as such he as a sinner can approach a holy God and not die when doing so. Each of the actions, realizations, and responses over a lifetime allows man to understand who God is and His inclination to bring those He created to Himself.[21] This realization for the Christian leader should enable an expansive orientation regarding the word "return" and the word "invest" and the

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[15] McKnight, W. 2010.

[16] Stowell, J. 2017. *"You were bought at a price; therefore glorify God in your body and in your spirit" 1 Corinthians 6:20.* http://getmorestrength.org/daily/return-on-investment/.

[17] Wright, N.T. 2010. *After You Believe.* New York: HarperOne.

[18] Willard, D. 2002. *Renovation of the heart: putting on the character of Christ.* Colorado Springs: NavPress.

[19] Block, P. 2015. *Authentic Ways to Build a Consulting Practice.* September 15. https://www.youtube.com/watch?v=QdzHPp2pUnQ.

[20] Wright, N.T. 2010.

[21] Ibid.

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importance of trust in the relationship; and, as such, the Christian leader is in a better position to recognize how trust influences outcomes.

In John 4:1-26, Jesus provided a snapshot for how to develop trust, despite extensive cultural differences that promulgated mistrust between the Samaritans and the Jews (v.9). Jesus started by recognizing the Samaritan woman was in a state of need, as no one gets water at the 6th hour because it is the hottest part of the day (v.6). Appealing to her intellect, He next started the conversation by respectfully discussing social matters (i.e., Jacob and the well). To progress the conversation further, Jesus then divulged the woman's real need for living water, after which there is evidence that the trust began to build, as the woman could have lied when Jesus confronted her stating "you have no husband for you have had five" (v.17). Finally, after trust is established, Jesus revealed His positional authority stating, "I who speak to you am he [i.e., Christ]" (v. 26).

Thus, the importance of trust in the relationship is so paramount that it supersedes the presentation of one's credentials; although credentials are still important. Jesus listened for the real need, or the desired return, and then addressed the woman's state with compassion. As the United States Secretary of Defense General Mattis conveyed "empathy and trust are the glue that binds".[22] Resultantly, "trust occurs when leaders act consistently within a value system, even when such adherence compels actions perceived by others as not being in their best interest". [23] As such, this aspect is more likely to predict future behavior and commitment in a changing or challenging situation.

Third, the Biblical model highlights the idea of a partnership using the concept of yoking. In Matthew 11:28, Jesus called others to himself who were tired, weary, and heavy-laden using the concept of being yoked together. Yoking with someone who is kind, carries more than his/her share of the burden, knows how to do the work, commits to the fulfillment of work, and understands the need for rest, creates a dynamic of easement.[24] Jesus conveyed that to whom one is yoked is more important than simply accomplishing the work. Although outcomes are important, they are secondary to the concept of yoking, as this aspect is a better predictor of achieving successful outcomes. As Kehrel, Klischan, and Sick (2015) stated, most partnerships fail because of the perception of compromised trust, which often comes in the form of a hindered exchange of information or to the perception that one is being opportunistic.[25] All of these aspects, the consultant must avoid, and yet, traditional ROI concepts fail to include them as primary ROI assessment criteria. Thus, the Biblical ROI model adds criteria, placing it before other traditional measures. See Figure 3 below.

[22] Forrester, D. 2017. *Four essential lessons General James Mattis taught me about leadership.* January 15. http://opinionhead.com/four-essential-lessons-general-james-mattis-taught-me-about-leadership/.

[23] Harshbarger, S. & Stringer, R. 2003. "Creating a climate of corporate integrity." *Corporate Board* 10-16. p. 11.

[24] MacArthur, John. 2010. *The Holy Bible, English Standard Version.* Wheaton: Crossway.

[25] Kehrel, K., Klischan, K., & Sick, N. (2015). Why Research Partnership Fail in the Biotechnology Sector--An Empirical Analysis of Strategic Partnerships. *International Journal of Innovation and Technology Management*, 1650003 (23 pages).

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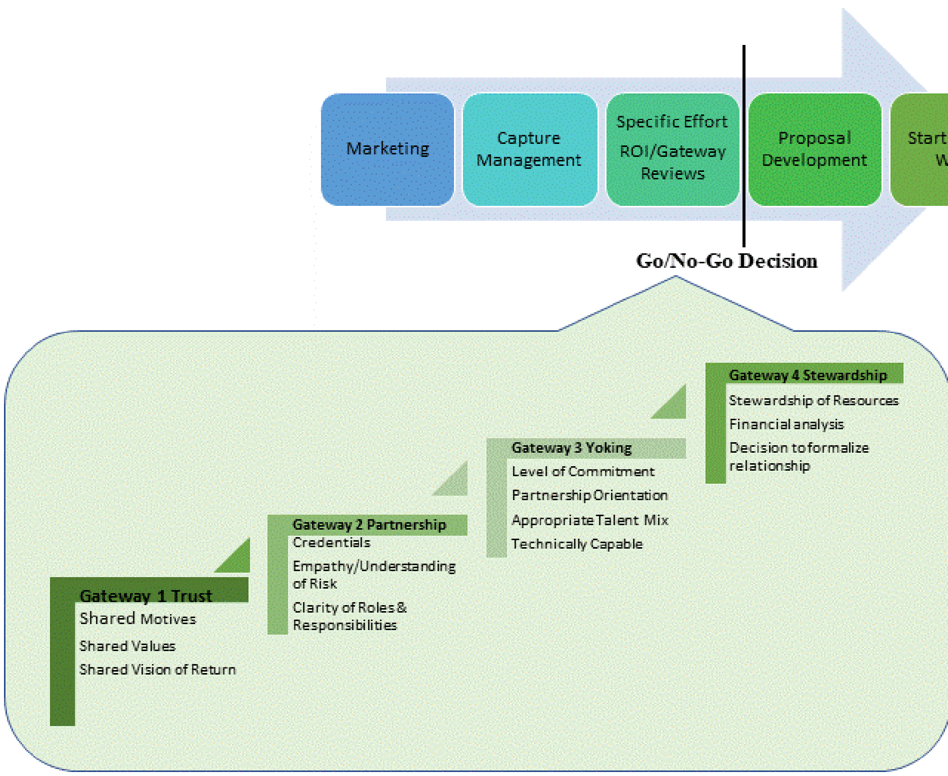
Figure 3. Biblical Consulting ROI Progression



V. COMPARING AND CONTRASTING THE MODELS

Consequently, when comparing the underpinnings of each of the three ROI models, the findings reveal that the consultant's and the client's processes filter the decision-making using a highly-targeted progression of questions, based on investment, intended to derive a narrow prediction about a return. The Biblical model, rather, looks at ROI through an expansive filter that primarily addresses "investment and return" in terms of trust, partnership, and yoking. Whereas, consultants focus on abating risk and supposedly making healthy organizational decisions and clients focus on commitment to fulfilling obligations, the Biblical perspective of ROI suggests placing greater emphasis on determining what is valuable within a relationship as a predictor of future outcomes. Instead of merely diminishing risk, the Biblical assessment focuses on opportunity. Instead of profit, it focuses on the importance of being part of something larger than the effort itself, as this is an indicator of future success.[26] Instead of a percentage of upfront investment, it suggests a 100% commitment or non-commitment based on the broader context of what makes up a successful relationship.

[26] VanTiem, D. & McElyea, J. 2010. "Transitioning from brick layer to cathedral builder: performance consulting and the power of one." *Performance Improvement* 17-25.

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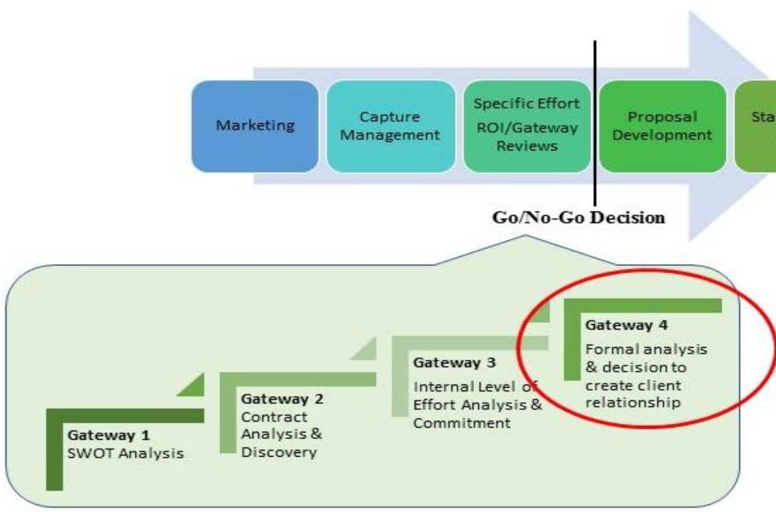
Christian leaders, when applying a Biblical perspective of ROI, will not only be freed from the reductionist view that measures success in financial terms, but also, abound in thinking that goes beyond the project to realizing how one project provides meaning, value, and societal importance.[27] As it says in Proverbs 31:18 “perception” is key for determining what is profitable in both the short and long term and it is this perspective a Christian leader can offer others when applying an ROI decision process.

Although many authors have suggested incorporating elements that assess trust, values, and motives as part of the ROI process, the “add in” approach is not likely to generate a change in perception or insight (See Figure 4). Adding in these elements is akin to the moralistic-therapeutic-deistic thinking many practice today.[28] The idea that people can take God and fit Him into a man-made construct believing this will achieve greater outcomes or insight is a myth. Instead, Christian leaders must give up their own thinking[29] and start with God’s model that is focused on developing and assessing trust.

Figure 4. ROI Decision-Making with “Add-in” Criteria



When the Christian leader starts with the Biblical model of ROI, he or she asks different questions and puts them in a different order—am I able to develop trust with this client and do they trust our organization can accomplish the work; is there enough understanding about the relationship to formally establish a working contractual relationship; and considering the work will progress for an extended period, are we suitable to be yoked with one another? Then finally, being good stewards of our resources, can we both accomplish our goals with the resources we have and will it benefit others in a larger context?

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27 Ibid.

28 Smith, C. & Lundquist-Denton, M. 2005. "Soul searching: the religious and spiritual lives of American teenagers." *Oxford University Press* ISBN 978-0-19-803997-6.

29 Mohler, A. 2005. *Moralistic Therapeutic Deism-the New American Religion.* April 18. http://www.christianpost.com/news/moralistic-therapeutic-deism-the-new-american-religion-6266/.

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VI. SUMMARY

In summary, when leaders use a man-made construct to filter their ROI decisions the result is a reductionist view. Without even realizing it, the filter uses money, profit, or merely what is beneficial to the organization. If aspects such as trust, partnership, and co-value creation are imputed into this construct, the ROI decision will likely proffer similar results, as a moralistic-therapeutic-deistic “add-on” can never offer greater insight, only happier temporal feelings in the short-term.

When leaders use a God-made construct to filter their ROI decisions, the result is an expansive view and one asks different questions in a different order. These questions include: (a) can I form a trusting relationship with the other entity and do they trust me so that we can successfully perform the work? (b) can we progress to a partnership and clearly articulate what that means in contract terms, as clarity is essential to productivity? (c) And will both entities want to be yoked together toward accomplishing the specific work, in light of a greater context? Using this filter, the last question becomes are we both able to be good stewards of our resources and can we use those resources to achieve a return. In this model, return can be measured in more ways than just profit and financial matters take on a supportive function in the decision-making process.

Whereas many experts would agree the ROI concept is supposed to achieve greater clarity, reduce risk, and articulate value, the Christian leader has an opportunity to filter the information through an expansive lens, considering higher order principles, such as motive, trust, and yoking, which will more effectively determine future outcomes. When this occurs, financial considerations no longer drive the decision-making, but rather support it. Although it is not likely every consultant-client relationship will share all the same values, in the end, Christian leaders will always be able to share the intrinsic joy that comes from being a part of something greater than themselves when engaging in the consultant-client relationship.[30]

About the Author

Cynthia Gavin is a strategist, having a diverse leadership background in healthcare, disaster response, and U.S. military planning. Presently she is an advisor for the Joint Chiefs of Staff JS J-4 Division. She holds a Master of Science in Emergency Health Services Planning, Policy, and Administration and is becoming a Doctor in Strategic Leadership at Regent University.

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[30] Wright, N.T. 2010.

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