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Feature Choice

SOAR 2020 and Beyond

Strategy, Systems Innovation and Stakeholder Engagement

SOAR has become a mainstay for organisations and communities wanting a way forward that engages everyone along a mutually agreed path. This article highlights how a dissertation twenty years ago led to a framework now used so successfully all over the world. SOAR can be simple or more complex by combining it with Appreciative Inquiry's 5D Cycle. The results are always significant. Examples show that, especially in the face of disruptive change like now, this approach still finds a strategic and inclusive way forward for others.



For over 20 years, SOAR has become known as “a profoundly positive approach to strategic thinking, planning and leading that allows any person at any level in an organization to create strategy and strategic plans through collaboration, shared conversations and a commitment to

SOAR includes a broad stakeholder focus and use of generative questions to guide strategic conversations.

action”.¹ SOAR stands for strengths, opportunities, aspirations and results, and is used as a framework to guide strategic conversations. SOAR is built upon the operating system of Appreciative Inquiry (AI) and as such is built on four generative questions:

Strengths	What are we great at?
Opportunities	What are the possibilities?
Aspirations	What are our dreams or wishes?
Results	What are meaningful outcomes?

Being a strategist, AI has transformed the way I think – especially my belief that strategy is important at all levels, from the individual to teams, organizations, communities and industries.

In this article, I share with you the simple beginnings of SOAR that I have often spoken about – but never written about. I present the essence of SOAR – how it includes a *broad stakeholder focus* and use of *generative questions* to guide strategic conversations – and share new insights on the meaning of strategy and strategic alignment with SOAR. Finally, there are three applications of SOAR using the AI 5D (or 5I) cycle, a Quick SOAR and one of the earliest stories told but never written about – a time for revitalization.

This article invites you to approach strategy and strategic thinking and planning in a new way, and to see how it engages and inspires innovation in the people who use it. I intentionally offer SOAR up to the world in the hopes that others find new and exciting ways to apply it to their unique circumstances and to build upon it.

SOAR is a framework, an approach that is built on the shoulders of a giant – Appreciative Inquiry.

SOAR is a framework, an approach that is built on the shoulders of a giant – Appreciative Inquiry (AI). My goal is to encourage and inspire you to use SOAR especially in times of a global pandemic (such as the COVID-19 current at the time of writing) filled with scarcity and uncertainty. In the AI world, we know that questions matter – generative questions start from a place of strengths and ask people about their aspirations and what they care deeply about. They become creative and move with positive energy to design a strategy – a pathway forward with meaningful results – that can make a difference.

¹ Stavros, J.M. and Hinrichs, G. (2009/2019) *Thin Book of SOAR: Creating Strategy that Inspires Innovation and Engagement*. Bend, OR: Thin Book Publishers, p. 6.

Your organization's driving force is people.

There is no one formula for success – a framework must be flexible, dynamic and able to integrate with other approaches.

SOAR's simple beginnings: Discovering capacity to thrive and grow

In 1998, my dissertation proposed a relational process of building an organization's future using AI with the subtitle (related to a key finding): *Your Organization's Driving Force is People*. This capacity-building framework demonstrates how organizations can have appreciative and inquiry-based conversations to see where they are (mission), where they wish to go (vision), who they are (values) and how to build capacity (at individual, organizational, multi-organizational or global levels) and capabilities to thrive and grow. The organizations in the study were part of the Global Excellence in Management (GEM) Initiative. Several findings emerged:

- The nature of capacity building is multilevel.
- There is no one formula for success – a framework must be flexible, dynamic and able to integrate with other approaches.
- Capacity building is relational – dialogue and collaboration build trust and shared objectives.
- Capabilities must be identified to start and support the capacity building process, beginning with those in the system.
- Capacity building results in participatory learning processes for those involved.
- Appreciative Inquiry facilitates capacity building.

These initial findings from the dissertation were published in ARNOVA proceedings and the *Journal of Global Social Innovations*.² If the idea of reading a 339-page academic paper excites you, I would be happy to send it to you.³

² Stavros, J. M. (2000, November) *Developing a framework for guiding capacity building using an appreciative style in NGOs*.

Stavros, J. M. and Salipante, P. (2000, November) *Organizational improvement for networks of nonprofit organizations: Capacity building lessons from an appreciative inquiry*. Both papers presented at the 29th Annual Conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), New Orleans, LA by J. M. Stavros, Winter 2000.

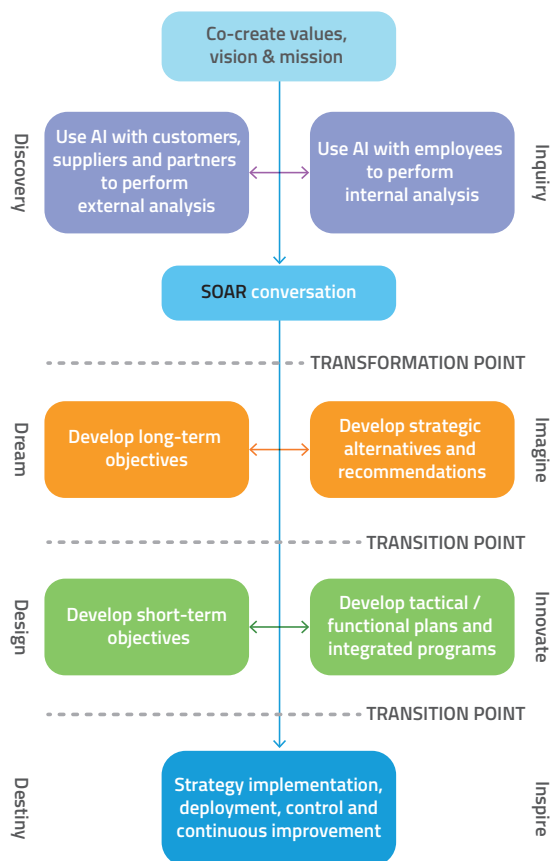
Northern and Southern Perspectives of Capacity Building Using an Appreciative Inquiry Approach. *Journal of Global Social Innovations*.

³ Stavros, J.M. (1998) Dissertation: *Capacity Building Using Appreciative Inquiry: A Relational Process of Building Your Organization's Future*. Unpublished dissertation. To get a copy email: jstavros@ltu.edu.

First application of the SOAR framework

Two years after publishing my dissertation, the Capacity Building and Capabilities framework was re-worked into the SOAR framework based on guidance from David L. Cooperrider and Lynn Kelley. At the time, Lynn Kelley was the vice-president of strategy for a large holding company overseeing the manufacturing plants around the world. This is where we first applied the SOAR framework. From this first illustration (Figure 1), the approach was clear that inviting stakeholders into the strategic planning process and asking questions to guide a strategic conversation were key.

Figure 1: Strategic framework



Principle of Wholeness: Intentionally inviting stakeholders

Historically, strategic planning is reserved for the most senior levels in organizations. SOAR flipped this idea on its head and embraced the AI principle of Wholeness by intentionally inviting *stakeholder* representation into the process.⁴

⁴ To learn more about the principle of Wholeness, see Whitney, D. and Trosten-Bloom, A. (2010) *The Power of Appreciative Inquiry: A Practical Guide to Positive Change*. pp. 66–68, Oakland, CA: Berrett Koehler Publisher.

Internal stakeholders – employees who work at different levels in the organization and can provide insights beyond senior leaders and board members – are invited. They magnify the organization’s ability to build a strengths configuration that inspires new or improved products, services and processes. Having seen the success of including internal stakeholders, some organizations also invite external stakeholders – customers, suppliers and community members – into the process.

Clarke, a global public health products and services company, has been very successful in engaging stakeholders since 2009. As a company, they develop and deliver environmentally responsible mosquito-control solutions and aquatic services to help prevent disease, control nuisances and create healthy waterways.

Clarke has held several AI summits, each time including all their 130 employees from five different countries plus key external stakeholders: customers, suppliers and thought leaders. At these summits, they start with identifying their strengths and envisioning a future of a most innovative and sustainable Clarke. They work on identifying opportunity areas and select those initiatives that align with their aspirations and where they can achieve both meaningful and measurable results. This organization knows how to “make Appreciative Inquiry stick”.⁵

Power and purpose of generative questions

Being “generative” means engaging people in conversations that inspire curiosity, imagination and action. Generative questions create a positive frame for individuals, organizations and communities⁶ to generate new perspectives, creativity and innovative ideas.⁷

McKinsey and Company, who has been doing strategy work since the 1950s, surveyed 1,200 global executives and learned that the best-performing organizations have a clear purpose, understanding of strengths, shared aspirations and leaders who know how to unleash ideas (opportunities) with a results-driven process.⁸

Being ‘generative’ means engaging people in conversations that inspire curiosity, imagination and action.

⁵ There is more on Clarke’s ongoing strategic journey at <https://www.clarke.com/appreciative-inquiry>.

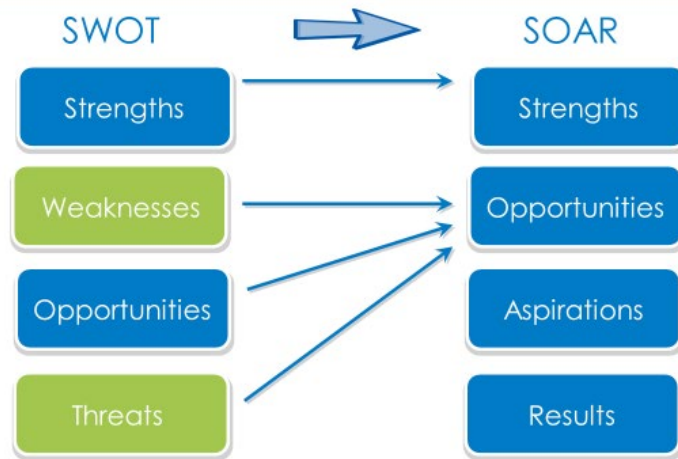
⁶ Stavros J.M. and Torres, C. (2018) *Conversations Worth Having: Using Appreciative Inquiry to Fuel Productive and Meaningful Engagement*, Oakland, CA: Berrett-Koehler Publishers.

⁷ Bushe, G. (2013) Generative Process, Generative Outcomes: The Transformation Potential of Appreciative Inquiry. In D.L. Cooperrider et al., eds., *Organizational Generativity: The Appreciative Inquiry Summit and a Scholarship of Transformation, Volume 4, Advances in Appreciative Inquiry* (Bingley, UK: Emerald Publishers), 89–113.

⁸ To read more on strategic change and how to transform your organization go to <http://www.mckinsey.com>: Isern, J. and Pung, C. (2007) *Driving Radical Change*. The McKinsey Quarterly, #4, pp. 1-12.

Figure 2: SWOT to SOAR

SWOT Analysis - SOAR Framework



A classic example is VISA corporation. While working with Dee Hock, the founder of VISA corporation, David Cooperrider observed that the success of VISA was due to strategic conversations that were “accomplished one conversation at a time with persons, teams, both small and large system meetings... every organization and every life’s destiny is a series of defining moments”.⁹ Cooperrider concluded, “our organizational lives and the lives of others flourish or flounder one conversation at a time”. During his tenure at the leader of VISA, Dee Hock was known as the “six-trillion-dollar man”.¹⁰ Today, VISA handles about \$11 trillion in transactions. At the age of 91, he is still researching and writing on how to take care of stakeholders while building a successful organization.¹¹

Strategic conversation: Reframing for opportunities and results

‘Our organizational lives and the lives of others flourish or flounder one conversation at a time!’

David Cooperrider

Most organizations, when engaging in a conversation around strategy, begin with a review of the current strategic position of the organization: the existing mission statement (purpose of the organization and who they serve), the value set (how they behave and make decisions), the vision (direction – where are we going) and outcomes. This may be followed by a SWOT analysis or an assessment of the internal strengths and weakness of the organization and the external

⁹ Cooperrider, D. (2018) Introduction – We live in worlds our conversations create. In Stavros and Torres, *Conversations Worth Having* (pp. 3–4).

¹⁰ Dee Hock and VISA mission and reach: <https://usa.visa.com/dam/VCOM/download/corporate/media/visanet-technology/aboutvisafactsheet.pdf>.

¹¹ As of this writing, Dee Hock is 91 years old: <http://www.deehock.com/#as-i-see-it>.

opportunities and threats.¹² Figure 2 shows how SOAR reframes weaknesses and threats and focuses on opportunities and results.¹³



The U.S. Army – Team Detroit Arsenal, made up of eighteen different capability teams with over 1,800 engineers, program managers and technical professionals, had a vision of engineers and technical professionals working together more collaboratively. So, in June 2019, instead of waiting for the senior leadership to tell them how collaboration should work, an initial team of 120 stakeholders came together to ask the following questions:

- What are the *strengths* of Team Detroit Arsenal (those capabilities that can be shared and built upon)?
- What are *opportunities* for collaboration for the whole organization and within each capability team?
- What does Team Detroit Arsenal care deeply about? What does your capability team care deeply about (*aspirations*)?
- What does a collaborative culture look like? How do we know we are succeeding at collaboration (*results*)?

¹² For those of you who want to learn more about how SOAR was created and how it is different from SWOT, refer back to the 2013 article in *AI Practitioner*, *The Generative Nature of SOAR: Applications, Results, and the New SOAR Profile* on pp. 9–12. Doi: 10.12781/978-1-907549-16-8-2.

¹³ Stavros, J. and Hinrichs, G. (2019) *The Thin Book of SOAR: Creating Strategy that Inspires Innovation and Engagement*, Second Edition, p. 16.

On the first day, the tables were split across workgroup areas, from platform engineering to vehicle power, mobility and cyber security. For the second day, teams met with their capability area. Keith Schweizer, Associate Director, Team Detroit Arsenal, Capabilities Development Command GVSC, shares this:

...the opportunity to bring our capability teams together to discuss our strengths, share dreams and ways to collaborate was invaluable. It created trust as well as creative and productive ways to collaborate and specific initiatives for action to create value. We are using the data and outcomes of the event for the betterment of the organization. The collaborative initiatives are flowing freely among teams, across departments and throughout the organization. This year we will bring 60% of the participants together with 40% new participants to review our results and have another strategic conversation on new designs to achieve even more. We are building a collaborative culture, one conversation at a time!

The research confirms that leveraging strengths and opportunities positively impacts individual and team performance in organizations and increases productivity 1.5 times greater than a focus on weaknesses and threats.¹⁴



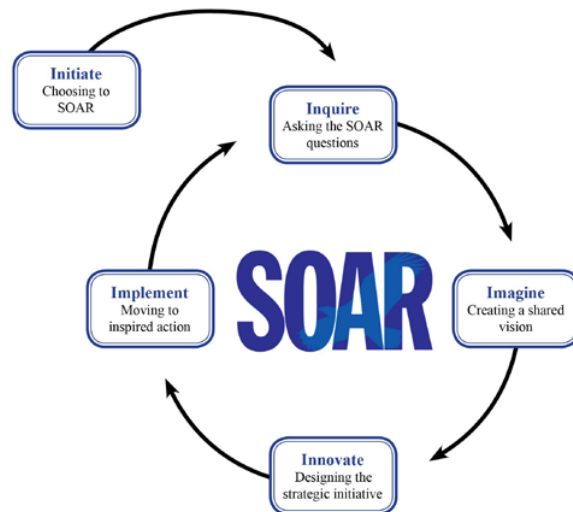
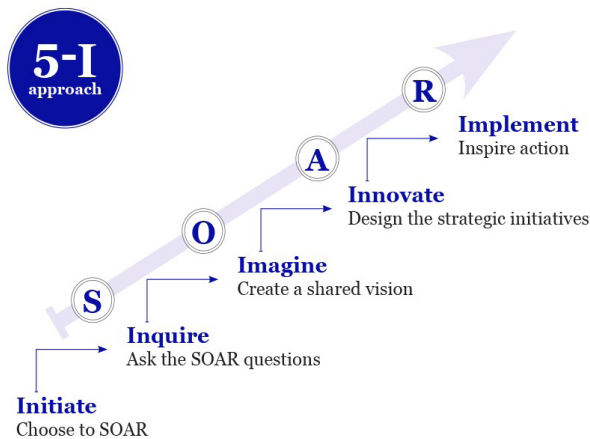
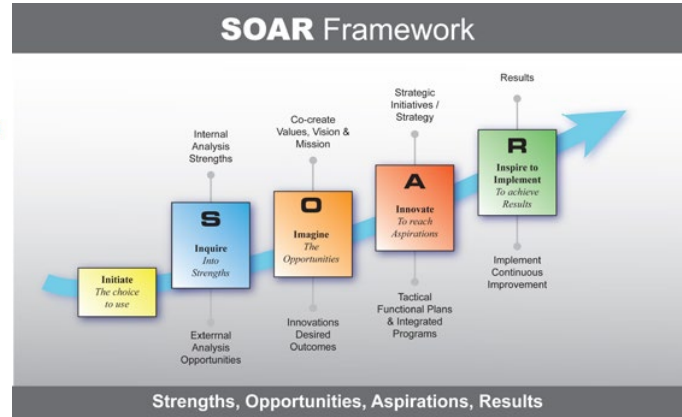
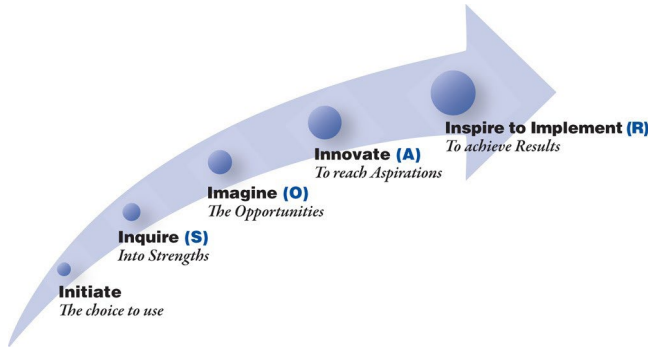
The essence of SOAR

SOAR serves as a framework to facilitate strategic conversations to identify and create a strengths configuration unique to the system, to imagine what's possible

¹⁴ Research summarized from Cameron, J. (2013) *Practicing Positive Leadership*, pp. 2–3, Oakland, CA: Berrett-Koehler Publishers; Fredrickson, B. (2009) *Positivity: Groundbreaking Research Reveals How to Embrace Hidden Strengths*, New York: Crown Publishers; Losada, M. and Heaphy, E. (2004) The Role of Positivity and Connectivity in the Performance of Business Teams: A Nonlinear Dynamic Model. *American Behavioral Scientist*, 47(6), 740–765. Doi: 10.1177/0002764203260208

– opportunities and understand aspirations – in order to achieve mutually beneficial results.

Figure 3: Designs of SOAR



SOAR's approach to strategic thinking, planning and leading also engages stakeholders in conversations that:

- Clarify and align the organization's values, vision and mission
- Decide on what profitable opportunities such as new markets, products, services or innovations should be actionable strategic initiatives
- Determine and align strategic initiatives with goals and objectives
- Revise or create new strategies, systems, processes and structures to support the strategic initiatives identified, and

- Create detail action plans – so things get done and everyone knows who is doing what, when, and the required resources as well as how to inspire, engage and reward employees.

SOAR: Scalable and flexible

SOAR is a scalable and flexible framework; there is no one right way to use SOAR.

SOAR was initially designed to be used with the AI 5D cycle (Define, Discover, Dream, Design and Destiny) or 5I cycle (Initiate, Inquire, Imagine, Innovate and Implement). Whether you use 5Ds or 5Is just depends on the language you wish to use. Over the years, we have seen how scalable and flexible the framework is; I want to emphasize that there is no one right way to use SOAR.

For instance, in 2009, a Quick SOAR emerged that did not use the 5D or 5I Cycle at all. Similarly, some simply use only one part of SOAR such as the “S” to guide a strategic conversation about a team’s strengths. There have been many visual representations of SOAR with the 5Ds and 5Is approaches (see Figure 3).

The constant in using SOAR is to start from a place of strengths. This allows participants to connect with others and create new opportunities and images of the future. Being inclusive and using generative questions encourages forward movement and has a positive impact on the wellbeing of stakeholders and the health of the organization.



Thus, SOAR’s continued intent is to guide a strategic conversation for improvement or innovation, or to design a strategic plan. For example, in March 2020, Reverend Dr Bill Lyons, Conference Minister and CEO of the Southwest Conference of the United Church of Christ and his leadership team designed a strategic planning session to engage 70 lay members and clergy who represent 46 churches and two faith communities’ organizations. Lyons said,

...we decided to use SOAR because it allows us to construct our future through collaboration, shared understanding and a commitment to action. I have used Appreciative Inquiry and its 5-D Cycle for many years and like how SOAR leverages the Appreciative Inquiry paradigm to shift and amplify the energy and dialogue of stakeholders to strengths, opportunities, aspirations and results. This strategic planning session is just the beginning. We will continue to include local churches and communities in the conversation in the months following our annual strategic planning meeting. Our ecumenical, interfaith and wider church partners will also have ways they can participate in the SOAR conversations to all 6,000 members in the conference.

Work here has increased significantly as we move services online and offer spiritual and pastoral care through virtual platforms ... SOAR and the 5-D cycle are in overdrive here.

Note: At the time of writing this article, while the world is in grip of the COVID-19 pandemic, Reverend Dr Lyons also shared with me (personal communication, March 20, 2020):

Since our SOAR Summit (on March 7), the work here has increased significantly as we support and resource our churches and clergy to move services online and to offer spiritual and pastoral care through virtual platforms because they can't be with their parishioners but want to be there for them. SOAR and the 5-D cycle are in overdrive here – starting from a place of strengths, we are having conversations and:

- *Discovering what parishioners need and want in this moment*
- *Dreaming what might be (zoom coffee clutches, drive in worship, streaming live)*
- *Designing these dreams into reality in innovative ways never before attempted*
- *Delivering: asking how this moment will change how they do what they already do well*

It's also been interesting to watch the correlation between platforms chosen for virtual ministry and the core strengths of each congregation. Churches who are best at production have tended to use FB Live and stream their production. Churches who value relationship over production have tended to choose Zoom for a more interactive



experience. My point, churches seem to respond to crisis instinctively out of their strengths, what they do best. That is going to be a new way for me to help move groups toward identifying their positive core and delivering new ways of ministry.

I encourage you to go back to the 2003, 2007, 2013 and 2014 *AI Practitioner* issues (there is more information about how to do so at the end of this article) for many practical examples of SOAR and the 5D (or 5I) approach, or check out the new second edition of *Thin Book of SOAR: Creating Strategy that Inspires Innovation and Engagement*.¹⁵

Simply SOAR (Quick SOAR)

In the last ten years, we have learned that SOAR can stand alone without using a 5D or 5I approach. In the 2009 *Thin Book of SOAR*, we introduced Quick SOAR: strategic conversations that can be scheduled for anywhere between sixty minutes to four hours to create a strategy to address a problem, challenge or opportunity.

This means to simply ask SOAR-based questions to guide a *strategic* conversation. What, then, does strategic really mean?

If you Google the word *strategic*, there are 484,000,000+ results. According to the *Cambridge Dictionary*, strategic “is an adjective that means ‘helping to achieve a plan, for example in business or politics.’” Sue Barrett has researched many definitions of the meaning of strategic that align with SOAR. She found four criteria for being strategic.¹⁶

- The organization takes an outside in view of how things are and should be done (in other words, they base their methods and operations on what customers want).
- The organization is proactive: strategic organizations make things happen rather than waiting for events to force them to change.
- Everything is aligned: the entire organization is committed to the journey, not just a department or two.

¹⁵ Visit www.soar-strategy.com and download a sample agenda and workbook for either a strategy or strategic planning session.

¹⁶ Barrett, S. (2012 April) What does being strategic mean?, *Smart Company*, <https://www.smartcompany.com.au/marketing/sales/so-what-does-being-strategic-really-mean/>

- Everyone involved is committed to an inspiring vision and purpose.

SOAR aligns with this understanding of what strategic means and how it works. SOAR provides the questions to frame strategic conversations that leverage the best and bring the whole system together. There is more than one way to ask generative question, too (see Table 1).

Table 1: The SOAR grid

<p>Strengths</p> <ul style="list-style-type: none"> • What’s working well? • What milestones have we achieved and what conditions helped us achieve them? • When have we attempted to achieve something this challenging in the past and succeeded? How did we do that? 	<p>Opportunities</p> <ul style="list-style-type: none"> • Given where we are, what creative actions might we take to actually come in on time and on budget? • How might we turn all our clients into raving fans? • What can we do to make our role in achieving this goal failsafe? • What is possible now?
<p>Aspirations</p> <ul style="list-style-type: none"> • What do we want our department to be known for? • What contribution would you like to make to this effort? • What will success look like for our team? • When we’ve achieved this goal, what will be different for us? 	<p>Results</p> <ul style="list-style-type: none"> • How will we measure our success? • What milestones will tell us what we’re doing is working? • What do we really want to measure? Ultimately, what matters? • Are the results we’re getting what we really want?

As the Quick SOAR process has shown it is not always necessary to use the 5D or 5I process when using SOAR.¹⁷ Similarly, some practitioners are now having strategic conversation on only one SOAR element such as strengths as Joe Sprangel shares in the following story.

SOAR framework: Let’s build from strengths

Positive thinking will let you do everything better than negative thinking will.

Zig Ziglar

¹⁷ Learn more about Quick SOAR in the second edition of J. Stavros and G. Hinrichs *Thin Book of SOAR*, pp. 24–27.

They pulled together a strengths' configuration of the plant.

Joe Sprangel, a former plant manager, began to use SOAR with a focus on what were the production team's *strengths* at an automotive components plant. Why? This plant was not achieving its production rates and at the same time experiencing quality issues. Joe shared that he simply went about improving productivity and engagement first through a focus on strengths. Since SOAR's operating system is AI, his initial strategic conversation centered on what the production team was doing right. From these conversations, they pulled together a strengths' configuration of the plant as well as another conversation around understanding which current skills should be enhanced. This provided an opportunity for learning and skill development.

Applying the **S** of SOAR to the situation, he began to write comments on the production boards at each line about what had gone well that day. Within six months, employees were letting him know what was going well and how production rates were being achieved. The conversations in the plant focused on its unique strengths' configuration.

Focusing on what individuals, departments and organizations are doing right leads to far greater success than focusing on what is wrong, the weaknesses.

For Joe, this success led him to adopt the use of the SOAR framework to help in other areas of the organization and outsider organizations. He says, "focusing on what individuals, departments and organizations are doing right leads to far greater success than focusing on what is wrong, the weaknesses. SOAR is an approach that is useful in moving your organization from the status quo to new heights of sustainability."¹⁸

SOAR: A whole-system approach for engagement and alignment

Strategies can emerge anywhere, from anyone in the organization. SOAR as a whole system strategic approach aligns engagement of those conversations on strategy assessment, strategy formulation, strategic planning and action-planning. Therefore, SOAR can be applied as nested levels in an organization from individual to a project, team, department, division or organization.¹⁹

Figure 4 represents a system where strategy is everyone's responsibility. You might wish to think about strategy as a blueprint – a schematic that shows how the system (a system can be the team, the department or the organization) works together to serve its stakeholders by understanding the mission (present purpose, its products and services) and strategic initiatives to achieve its vision (future direction) and obtain its goals and objectives. This blueprint can also

¹⁸ You can learn more about Joe Sprangel's practice and research at <https://emmanuelstrategicsustainability.com/know-thyself-with-hbdi/>.

¹⁹ This is highlighted with a new chapter (Chapter 6: SOARing at Multiple Levels) in the second edition, of J. Stavros and G. Hinrichs, *Thin Book of SOAR*.

include the organization’s core values and operating principles – how the organization’s members behave. Strategic initiatives include those products, services, innovations, new markets and processes that will help them achieve desired results.

Figure 4: SOAR at Nested Levels



Strategy deals with what needs to get done and how to get things done. A strategy is a well-thought out pathway that defines where the organization is now, where it wants to be and how it can get there. These elements can go into a strategic plan that lays out the values, mission, vision, strategic initiatives, goals and objectives to best serve its stakeholders better than anyone else. SOAR can guide the organization’s members in a strategic dialogue where peoples’ participation in the process helps create a sense of ownership in the pathway forward.

I would like to share one of my earliest engagements using SOAR, which has had a profound impact on me and the people at the plant who designed a strategy of revitalization.

I was asked to facilitate a conversation with 100 people who represented the 400 people working at an automotive plant in a small mid-western town that was slated for closure by its holding company. The objective was to come up with a three-year strategy to close the plant. This meant we had three years to phase out everyone’s job at the plant.

I threw out a 'what if' question. I asked, 'What if we created a revitalization plan?'

I remember that very hot summer morning in July when I arrived at a community golf course several miles from the plant to co-facilitate a conversation with the plant manager and the employees about how we were going to approach this strategic conversation. I could see and feel the tension in the room: the employees were not in a positive mindset, but those that showed up were open to the conversation because they knew that they would have a say as to how this plant was going to be closed down.

We started the conversation by connecting to purpose, by asking why each person showed up – why was it important for you to participate in this difficult discussion?

After hearing and seeing these people connect to purpose and each other, I threw out a “what if” question. I asked, “What if we created a revitalization plan?” One person responded that there is no such thing as a “revitalization plan”. I asked again, “what if we create a revitalization plan that gave this plant a genuine second chance?” Then, I suggested a third time, “What if we asked for another twelve months to turn-around the plant? And, if we were not able to revitalize this plant within twelve months, we would close it down in two years?” There was a long pause. And the plant manager asked each person if they would commit the next day and half to create a revitalization plan with a clear purpose, vision and specific initiatives to turn-around this plant. We used SOAR to frame our strategic conversations to create a revitalization plan. We started from strengths:

We started from strengths: Moments of excellence; Strategic (positive) core.

Moments of excellence Think of a moment, a time when this plant was at its best. What was happening? What did you or your team/department bring to this moment? What made it great?

Strategic core (positive core) As you reflect on your story about the plant being at its best, what two or three things do you value most about this plant? In other words, no matter how this plant will change and revitalize, what are those strengths – capabilities we want to build from?

The questions above were asked in one-on-one interviews. Then, we moved into table conversations and created a strengths configuration. Each table identified between three and five of the plant’s strengths. There were many similarities: they combined these into the top fifteen strengths.

We ended the first day with a strengths' configuration and dozens of opportunities to revitalize the plant.

From the inquiry and identification of strengths, we began to imagine what a revitalized plant would look like and explore the opportunities that could deliver on these images. We ended the first day with a strengths' configuration and dozens of opportunities to revitalize the plant.

We ended by asking the participants to consider these questions:

- What are some of the most valuable initiatives that can support a revitalization?
- What are some of the boldest initiatives that can support a revitalization?
- What are the resources needed? Who can help? Who can co-champion these initiatives?
- How do we establish a level of trust and credibility with the holding company that shows our commitment to revitalization ... a commitment that is unparalleled in this industry?

We started the second day with a conversation around their aspirations:

- What do you care deeply about when it comes to this plant?
- Reflecting on our strengths and opportunities conversations from yesterday, what strategic initiative (i.e. project, program, process, retooling or innovation) would support the revitalization dream?

Teams were then formed to design twelve strategic initiatives to revitalize the plant. Each team created a set of goals, objectives and action plans that included required resources and the critical stakeholders to make it happen. These initiatives were prioritized and built into a revitalization plan that was submitted in three business days to the holding company. Thirteen years later, the plant soars and is still operating. It just goes to show that people commit to what they create, and the holding company gave them the second chance. Everyone from the plant floor to the plant manager understood that strategy can be created by anyone, anywhere, anytime. They knew that their plant mattered, and demonstrated how and why it did.

I share this story in the hope that it is an inspiring example for leaders and stakeholders to draw on if they are engaged in tough conversations about the future direction or revitalization of their organization and communities.

Next steps in SOAR

SOAR started primarily as a strategic thinking and planning framework to be used in small group strategy conversations and in organization-wide strategic change initiatives.

I hear of SOAR's use at every level, from creating strategy for oneself, to team-based coaching, to strategic conversations at local, national and international levels in strategic planning and innovation summits. SOAR efficacy is being studied by master's and doctoral students with proven results in how it works with Emotional Intelligence and 360 Feedback to build strategic capacity, increase employee engagement and support senior leaders' decision-making and collaboration.

New uses are also emerging where people in their organizations and communities are aligning to engage and innovate for their whole system whether in the for-profit, non-profit, social or government sectors.

I want to conclude this article by referring to two people who gave me the courage to soar and take this approach to wider and wider audiences. They are Dewitt Jones, National Geographic photographer and creator of the video, *Celebrate What's Right in this World*²⁰, and Anne Radford, publisher emeritus of AI Practitioner, who encouraged me to get the word out about a new approach to strategy and strategic thinking and planning that built on strengths and aspirations to create opportunities and meaningful and measurable results. I'd like to say a special thank you to Anne Radford who thoughtfully edited this feature article and shared in a conversation with me that "the world needs SOAR more than ever to have strategic conversations as they refigure their purpose, vision and way forward" (personal communication, March 27, 2020) and her insights below.

Dewitt Jones said, 'SOAR provides an approach that will help people in your organization gain the focus and the courage to pursue what's right.'

Dewitt Jones: Courage to SOAR

Dewitt Jones said, "I have spent my life seeking and providing positive perspectives so others can focus their vision and see the extraordinary. In the area of strategy and strategic planning, SOAR provides an approach that will help people in your organization gain the focus and the courage to pursue what's right. It will help them discover the courage to SOAR!"

²⁰ In his video, *Celebrate What's Right with the World*, Dewitt Jones advocates using a positive mindset to deal with change. He shares, "Connect with a vision that opens us to possibilities and gives us the courage to soar." For more information, visit: <http://www.dewittjones.com> or <https://starthrower.com>

David Cooperrider reminds us the task for Appreciative Inquiry is the quest and search for what gives life and generative potential – even in the midst of the tragedy. How will we bring ‘the gift of new eyes’ to soar in challenging situations that arrive with increasing frequency?

He has also given permission to use the puffball picture and commentary at the end of this article that were key to giving me the courage to soar (personal communication, March 23, 2020).

Anne Radford shares: What’s next for SOAR?

SOAR is proving to be the great success we hoped it would be. Its operating system is Appreciative Inquiry with a set of principles as well as specific steps to follow if needed.

As AI was developing a following in the 1990s, the SOAR approach to strategic thinking, planning and leading that built on AI was a wonderful, evolving development. Also, SOAR’s foundations were strong and initial applications successful. I felt very confident that the 2003 article in *AI Practitioner* would be a success. It was, as were the related articles that followed in 2013 and 2014, plus the 2007 special edition on SOAR applications. With each SOAR article, the traditional world of strategy and strategic thinking and planning was being overtaken by a strengths-based approach that brought engagement, innovation and commitment. This was so very different from the days I remember when the corporate strategic plan was developed and sent down from the executive suite to the rest of us for implementation.

And what’s next for SOAR? At the time of writing, we are all caught up in the 2020 COVID-19 pandemic. Thinkers, economists, environmentalists and others tell us that the pace of these major disruptions will only increase. So, how do we use our skills and abilities to anticipate these changes or re-invent ourselves and our systems for the changing world? Perhaps, organization members and community members will consider using SOAR in their pathways forward.

David Cooperrider reminds us in his Foreword to McArthur-Blair and Cockell’s book, *Building Resilience with Appreciative Inquiry: A Leadership Journey through Hope, Despair, and Forgiveness*, that whatever the circumstances, the task for Appreciative Inquiry is the quest and search for what gives life and generative potential – even in the midst of the tragedy. So, where and how will we bring “the gift of new eyes”²¹ to soar in challenging situations that arrive with increasing frequency? Hopefully, the generative applications of SOAR will help us in this.

For now, we invite you to SOAR! We welcome your feedback as you let us know how it goes.

²¹ McArthur-Blair, J. and Cockell, J. (2018). *Building Resilience with Appreciative Inquiry: A Leadership Journey through Hope, Despair, and Forgiveness*. Oakland, CA: Berrett-Koehler Publishers.



*In 1969, I took this photo of a dandelion puffball.
Over the years it has become the symbol of my life's work;
a symbol of Celebrating What's Right with the World.
This tiny orb, backlit by the sun, shining with truly unexpected beauty
and shining with incredible potential for growth and possibility
as well.*

*I send it to you today at a time
where many in the world are filled with dread.
I send it to remind us that there is far more
to celebrate on this planet than there is to fear.
To remind us that by celebrating what's right with the world;
we will find the energy, the love, and the compassion
to deal with what's wrong.
We will get through this, my friends.
Not with fear, but with love.
It's our choice, each and every day.*

Dewitt 23 March 2020

SOAR articles published in *AI Practitioner*, 2003 to 2020

Tracing the development and practice of SOAR with its operating system, AI

The first published article on SOAR was in *AI Practitioner* in November 2003, “Appreciative Strategy”. This issue was also the first publication of many AI practitioners’ and scholars’ writing about the theory and practice of AI in strategy and strategic planning. I had the opportunity to co-author a theory article with John Sutherland from the Netherlands on “The Heart of Appreciative Strategy” and a practical article with David Cooperrider and Lynn Kelley, “Strategic Inquiry & Appreciative Intent: Inspiration to SOAR: A New Framework for Strategic Planning” on the initial applications of how SOAR was used in strategic planning processes. In this issue are eight more case studies on early work of appreciative strategy.

The development of SOAR has been chronicled in *AI Practitioner* from the very beginning. In order to give readers access to the complete history and development of SOAR, *AI Practitioner* is making the three articles and the issue devoted to SOAR available with this paper updating SOAR in the May 2020 issue of the journal.

Click [here](#) for access to the 2003 classic issue.

In 2007, *AI Practitioner* dedicated an entire issue to SOAR applications around the world, titled: *SOARING to High and Engaging Performance: An Appreciative Approach to Strategy*. This issue highlighted that SOAR is an effective, flexible, strategic framework that engages stakeholders at all levels in an organization and, for some organizations, gives a frame that lets them bring external stakeholders into their strategic planning processes. There are eleven case studies on how SOAR has been used to guide strategic conversations; imagine an organization’s most preferred future; create innovative strategies and ways of collaborating that build life-giving, sustainable cultures and inspire others to engage in strategic conversations – that make a difference.

Click [here](#) to access the 2007 issue on *SOARING to High and Engaging Performance*

In 2013, a feature article highlighted empirical research on SOAR and the ongoing comparison of SWOT to SOAR. Since this article in *AI Practitioner* (2013)²², we have learned from both practitioners and researchers that SOAR is being used in more ways than originally intended.

Click [here](#) for the 2013 Feature Choice article

22 Stavros, J.M. (2013) The Generative Nature of SOAR: Applications, Results, and the New SOAR Profile, *AI Practitioner*, 15(3). www.aipractitioner.com
Doi: 10.12781/978-1-907549-16-8-2

Since the 2013 feature article, SOAR has continued to spread around the globe – a positive contagion that builds positive connections, creates innovations, inspires actions and fuels engagement in organizational life and communities. In 2014, there was a special article in *AI Practitioner's* Research Review & Notes, on eight empirical studies on the efficacy of SOAR. As of writing in 2020, there are over sixteen empirical studies on SOAR.

Click [here](#) for the 2014 *Appreciative Inquiry* Research and Notes.

In 2020, I was invited back to provide an update on SOAR. Since it is built on the Appreciative Inquiry operating system; what better place than in *AI Practitioner* to give an update! This article has a bonus in that you get access to the prior articles on SOAR.

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