

SOAR Analysis Guide and Template



November 2020

Appreciative Inquiry

Appreciative Inquiry is the co-evolutionary search for the best in people, their organizations, and the relevant world around them. It is rooted in radical social constructionism, appreciation, and the generative power of positive imagery, concentrating on positive means and methods rather than deficit-based, curative actions.

Appreciative Inquiry is a transformational change process that focuses on improving existing organizational processes and challenging established belief systems through sharing of new ideas and knowledge; in essence, to change how people think rather than what people do.

Appreciative Inquiry is a way of thinking about the world around us with constructivist ideas. It is a philosophy of seeing the possibilities in life, of seeing the glass half full.

Appreciative Inquiry employs a SOAR analysis: Strengths, Opportunities, Aspirations, and Results. It is different from the traditional SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats).

SOAR vs. SWAT

SWAT ANALYSIS	SOAR ANALYSIS
Analysis Oriented	Action Oriented
Weakness and Threat Focus	Strengths and Opportunities Focus
Competition Focus – <i>Just be better.</i>	Possibility focus – <i>Be the best!</i>
Incremental Improvement	Innovation Breakthroughs
Top Down	Engagement at All Levels
Focus on Analysis – Planning	Focus on Planning – Implementation
Energy Depleting – There are so many weaknesses & threats!	Energy Creating – We are good and can become great!
Attention to Gaps	Attention to Results

Conducting a Soar Analysis

S

Strengths: *What can we build on?*

- What are we most proud of as an organization?
- What makes us unique?
- What is our proudest achievement in the last year or two?
- How do we use our strengths to get results?
- How do our strengths fit with the realities of the marketplace?
- What do we do or provide that is world class for our customers, our industry, and other potential stakeholders?

O

Opportunities: *What are our stakeholders asking for?*

- How do we make sense of opportunities provided by the external forces and trends?
- What are the top three opportunities on which we should focus our efforts?
- How can we best meet the needs of our stakeholders?
- Who are possible new customers?
- How can we distinctively differentiate ourselves from existing or potential competitors?
- What are possible new markets, products, services or processes?
- How can we reframe challenges to be seen as exciting opportunities?
- What new skills do we need to move forward?

A

Aspirations: *What do we care deeply about?*

- *When we explore our values and aspirations, "what are we deeply passionate about?"*
- *Reflecting on our Strengths and Opportunities conversations, who are we, who should we become, and where should we go in the future?*
- *What is our most compelling aspiration?*
- *What strategic initiatives (projects, programs and processes) would support our aspirations?*

R

Results: *How do we know we are succeeding?*

- Considering our Strengths, Opportunities, and Aspirations, what meaningful measures would indicate that we are on track to achieving our goals?
- What are 3 to 5 indicators that would create a scorecard that addresses a triple bottom line of profit, people, and planet?
- What resources are needed to implement vital projects?
- What are the best rewards to support those who achieve our goals?

Step One, Strengths: *What can we build on?*

- What are we most proud of as an organization?
- What makes us unique?
- What is our proudest achievement in the last year or two?
- How do we use our strengths to get results?
- How do our strengths fit with the realities of the marketplace?
- What do we do or provide that is world class for our customers, our industry, and other potential stakeholders?

Consider these questions and perhaps other related questions for your organization. In the space below, identify your organizational strengths.

Step two, Opportunities: *What are our stakeholders asking for?*

- How do we make sense of opportunities provided by external forces & trends?
- What are the top three opportunities on which we should focus our efforts?
- How can we best meet the needs of our stakeholders?
- Who are possible new customers?
- How can we distinctively differentiate ourselves from existing or potential competitors?
- What are possible new markets, products, services or processes?
- How can we reframe challenges to be seen as exciting opportunities?
- What new skills do we need to move forward?

Consider these questions and perhaps other related questions for your organization. In the space below, identify the opportunities for your organization.

Step three, Create Pairs

Pair your organizational strengths and opportunities to identify what the organization does best and how the organization can leverage or apply that strength with an opportunity.

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Step four, Aspirations: What do we care deeply about?

- When we explore our values and aspirations, “what are we deeply passionate about?”
- Reflecting on our Strengths and Opportunities conversations, who are we, who should we become and where should we go in the future?
- What is our most compelling aspiration?
- What strategic initiatives (projects, programs, and processes) would support our aspirations?

Consider these questions and perhaps other related questions for your organization. In the space below, identify the aspirations for your organization.

Step five, Results: How do we know we are succeeding?

- Considering our Strengths, Opportunities and Aspirations, what meaningful measures would indicate that we are on track to achieving our goals?
- What are 3-5 indicators that would create a scorecard that addresses a triple bottom line of profit, people, and planet?
- What resources are needed to implement vital projects?
- What are the best rewards to support those who achieve our goals?

Consider these questions and perhaps other related questions for your organization. In the space below, identify the desired results for your organization.

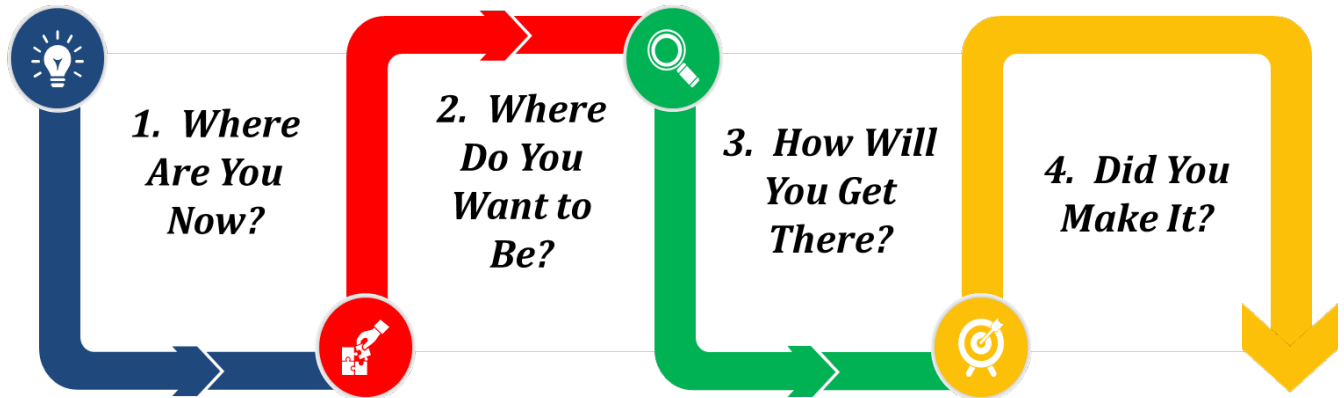
Step six, Strategies: Create Potential Strategies

Develop strategies that will define the actions that will enable you to reach organizational goals. Specifically, align your aspirations with specific results to create strategy statements.

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SOAR Alignment with the 4-Step Strategic Planning Process

The 4-step strategic planning process is a simple, yet effective technique for planning. It is also called management by objective. SOAR analysis aligns with the process as shown below.



Strengths: *Where are you now?*

Opportunities: *Where do you want to be?*

Aspirations: *How will you get there?*

Results: *Did you make it?*