AI Practitioner

Appreciative Inquiry in Asia

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Inside this issue

Welcome to August 2013 issue of AI Practitioner
Anne Radford, Editor in Chief

This August 2013 issue, Appreciative Inquiry in Asia, takes us to a part of the world undergoing dramatic transformations.

The editors, Noel E. K. Tan and Fiona O'Shaughnessy, show us how organisations in Asia are dealing with the organisational consequences of rapid economic growth. The complexity is compounded as leaders and consultants are looking into where and how they can use perceived western

approaches like Appreciative Inquiry in the context of their Eastern values and philosophies.

In the Feature Choice article, Jackie Stavros shares experience and empirical research on the hugely successful SOAR strategic thinking and planning framework. She also introduces the SOAR 5-I Approach or Quick SOAR as well as the SOAR Profile, a new survey instrument that will be launched in Thailand later this year.

In Research Notes, Anita Singh presents results of research that intentionally seeks

to combine qualitative and quantitative approaches while studying the impact of an AI-based intervention involving Myrada and AI in rural India. (See also *AI Practitioner* February 2013 and August 2011.)

AI Resources lists books culture, focusing on Eastern Asia; websites on social construction and psychology studies in China; and AI-related studies and resources on Asian culture. There are also two new publications, including an AI innovation: AI playing cards.

Inside this issue

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Strengths-Based Change*. She consults and pro-
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Feature Choice
by Jacqueline M. Stavros

The Generative Nature of SOAR: Applications, Results and the New SOAR Profile

The purpose of this article is to share some of my experiences and learning journey in the ongoing development of the SOAR strategic thinking and planning framework and its applications, plus some empirical research that has been conducted to advance the theory and practice of SOAR. I begin with a brief review of the SOAR framework, highlight some of its applications, and address one of the common criticisms of SOAR – that it ignores an organization's weaknesses and threats.

This article presents the framework's evolution from using the generative nature of Appreciative Inquiry, where SOAR leverages the "SO" from traditional SWOT analysis to build a transformational strategic thinking framework. (Stavros and Hinrichs, 2007) Next, I offer two illustrations of how organizations are using the SOAR framework with either the SOAR 5-I Approach or a Quick SOAR and present examples of organizations from around the world that have benefitted from SOAR's application (see Appendix 1) since the 2007 issue of *AI Practitioner,* in which the article "SOARing to High and Engaging Performances: An Appreciative Approach to Strategy" appeared.

Then, I highlight several empirical studies that examine how the core elements of SOAR build trust that increases supplier and customer performance; how SOAR has been used to build strategic capacity; the integration of SOAR and flow for improved performance; and the watershed moment for stakeholders in a school in India that is using SOAR.

Finally, the article ends with the introduction of the SOAR Profile, a new survey instrument that is being developed to understand strategic thinking capacity. The SOAR Profile will be launched with participants at the ABAC-OD Summit 2013 on "SOARing to Positive Transformation and Change," to be held by Assumption University of Thailand, Graduate School of Business (ABAC-GSB) on November 21-23, 2013. With the leadership of Dr. Perla Tayko, ABAC-GSB has been in the forefront of promoting positive organization development and transformation in Thailand.[1]

SOAR begins with a strategic inquiry using an appreciative intent.

What is SOAR?

For those unfamiliar with it, SOAR stands for strengths, opportunities, aspirations and results. SOAR is intended to be a "positive approach to strategic thinking and planning that allows an organization to construct its future through collaboration, shared understanding and a commitment to action" (Stavros and Hinrichs, 2009, p.3). The SOAR framework provides a flexible approach to strategic thinking and strategy creation. SOAR helps planners understand the whole system by including relevant stakeholders, and encourages those in charge of strategic planning to invite stakeholders beyond senior management. These stakeholders can be employees, customers, suppliers and communities which the organization impacts. Viewing the whole system provides a more complete picture of how an organization operates and what its future can become by considering many different perspectives.

SOAR: Inquiring with appreciative intent

The SOAR framework is intentionally different than using a SWOT analysis. While SWOT concentrates on internal strengths and weaknesses as well as external opportunities and threats, SOAR begins with a strategic inquiry using an appreciative intent through a discussion regarding the strengths and opportunities available to the organization. SOAR reframes weaknesses and threats that arise during the strategic dialogue, and then proceeds to identify the strategic core of what the organization aspires to become, along with grounding those aspirations into measurable future results. (Stavros and Sutherland, 2003)

The focus of the SOAR framework is to:

- *Imagine* the most preferred future;

- Create *innovative* strategies, plans, systems, designs and structures;

Figure 1: SOAR Framework
(www.soar-strategy.com)
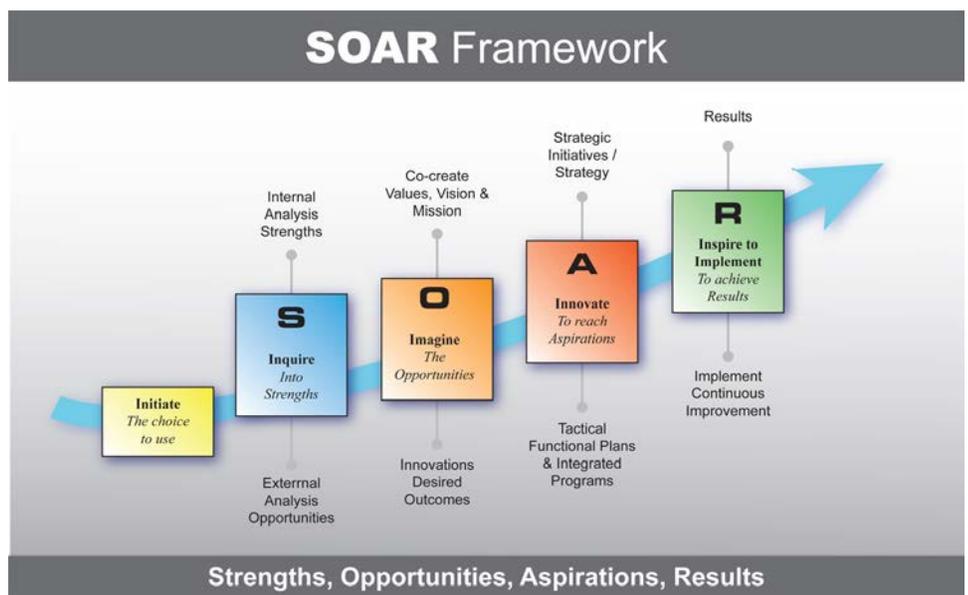
The core features of traditional strategic planning have scarcely changed in the last 60 years.

- Build a sustainable culture; and

- *Inspire* organizational stakeholders to soar to a state of engaged high performance and execution of strategy.

SOAR is recognized as a strengths-based framework with a whole system (a multiple stakeholder) approach to strategic thinking and planning.

Moving from SWOT, TOWS to SOAR

In spite of the tumultuous changes of our global economy and competitive environment, the core features of the traditional strategic planning approach have scarcely changed in the last 60 years. The traditional approach to strategic planning processes involves an analysis based on the SWOT (strengths, weaknesses, opportunities, threats) or its re-combined counterpart TOWS (threats, opportunities, weaknesses, strengths). SOAR emerged from the following question asked by a vice president of strategic planning: "If companies are using the traditional strategic planning approach — and are experiencing only limited success — might we build upon SWOT or create an alternative approach?" Using Appreciative Inquiry as its operating platform, SOAR simply began as an extension of the "S" and "O" elements in the SWOT framework.

The SWOT analysis has been the de facto standard for organizational strategic planning for many years (see Table 1) and an analysis tool for auditing an organization and its environment. For many strategic planners, it is the first stage in a long process of planning.

Table 1: SWOT Analysis

Internal environment (S and W)	**Strengths** Organization's resources and capabilities Basic for developing "competitive advantage"	**Weaknesses** Absence of strength; lack of a resource or capability Flipside of a strength; downside of focusing on competitive advantage
External environment (O and T)	**Opportunities** External circumstances that support profit and growth Examples: unfulfilled customer needs, new customers, new technology, favorable legislation	**Threats** External circumstances that hinder profit and growth Examples: more competitors, changes to revenue stream, restrictive regulations

The central focus of SWOT is to construct competitive advantage by understanding the "as-is" state in the organization. In other words, SWOT suggests shorter-range strategies based on existing capabilities in response to current external

variables. It provides equal focus on strengths–opportunities and weaknesses–threats. Many strategy textbooks suggest avoiding strategies that place too much emphasis on weakness and threats when trying to focus on creating innovations and strategic advantages. (Kim and Mauborgne, 2005; Thompson, Strickland and Gamble, 2008) Wheelen and Hunger (2006) have suggested another way to look at SWOT is the TOWS matrix (see Table 2), which focuses an organization's strengths and opportunities that have the best chance for success (i.e., the S-O Quadrant).

Table 2: TOWS

Opportunities	**Strengths** S–O Strategies: Good fit between positive aspects of internal and external environments	**Weaknesses** W–O Strategies: Attempt to overcome weaknesses to pursue opportunities
Threats	**S–T Strategies** Build on strengths to reduce vulnerability to threats	**W–T Strategies** Defensive plans to reduce susceptibility to external threats

Source: Adapted from the TOWS Matrix Figure 6.2 on p. 144 in T. Wheelen and D. Hunger (2006), Strategic Management and Business Policy – Tenth Edition.

SOAR uses the Appreciative Inquiry paradigm to shift and amplify the energy of the planning process into the S–O quadrant. Table 3 illustrates this shift.

Transformation into SOAR

Table 3: SOAR: Strategic Inquiry with Appreciative Intent

Strategic Inquiry	**Strengths** What are we doing well? What are our greatest assets?	**Opportunities** What are the best possible market opportunities? How do we best partner with others?
Appreciative Intent	**Aspirations** To what do we aspire? What is our preferred future?	**Results** What do we want to be known for? What are our measurable results?

A case study of a San Diego area school district described their experience with a planning process deeply rooted in a SWOT analysis as follows: "The SWOT approach gave us a plan, but took our spirit" (Daly, Millhollen and DiGilio, 2007, p. 39). Therefore, the district decided to approach its next three-year strategic plan by using the SOAR framework. The SOAR approach allowed for full engagement of multiple stakeholders while also driving organizational energy to be intensely

'R' built on the strengths of the Balanced Scorecard which measures not just financial performance, but also marketing, operations, learning and growth opportunities.

positive. One teacher reflected, "We have a sense of commitment to work collectively … right now!" (p. 41). The lead facilitator felt the process provided a very open and rigorous identification and examination of strengths while identifying opportunities for shared aspirations for continuing excellence in teaching and learning, and focusing on student learning outcomes (results). One respondent stated, "It is in this environment that the best of tomorrow can be nurtured today (p. 42).

The 'S' and 'O' of SOAR

SOAR supports an intentional shift of conversations from weaknesses to strengths, and problems to possibilities. Consequently, this approach seeks to identify, hone and build on the organization's strengths as the foundation for strategic growth. The discussion moves from a position of "we have problems that need to be fixed if we want to move forward" to a position of "this is what we excel at and which can help prepare ourselves for, for the future." Ellen Langer calls this shift "paying attention: looking for what is new and different, and questioning preconceived ideas" (Ruark, 2010, p. B7). Langer calls her approach the "psychology of possibility" (p. B10). These conversations can help people identify what they really want to increase rather than what they want to avoid.

The SOAR framework supports Langer's concept of strategic possibility thinking and conversations. For example, instead of stating a weakness such as "we have significant problem with distribution," an organization could reframe this as an opportunity such as "we have an opportunity to create a world class distribution channel to best service our customers and expand to new customers."

The framework also integrates well with other strategic planning and change methods and analytical tools, In the popular book *Blue Ocean Strategy* (Kim and Mauborgne, 2005), a key theme is that organizations need to create and capture new markets by focusing not on the competition, but on creating and capturing new market opportunities in a blue ocean. Blue oceans "are defined by untapped market space, demand creation and the opportunity for highly profitable growth" (p. 4).

Adding the 'A' and 'R' of SOAR

In SOAR, the "A" was originally anticipated and included to allow the strategic team to come up with an anticipated vision statement, mission statement and set of strategic goals and objectives. Later the "A" was changed to aspirations to represent the stakeholders' desires for the most desirable future. The "R" element initially stood for recognize, then resources, then rewards and finally results. This evolution occurred because resources and rewards had to be built into systems and structures to follow strategy. After several applications of SOAR, the "R" evolved into measurable and meaningful goals: results. This "R" is built on the strengths of the Balanced Scorecard from Kaplan and Norton (1996), which measures not just financial performance, but also marketing, operations and learning, and growth opportunities.

The key with SOAR is to involve more than just senior leadership in the strategic thinking and planning process.

Strategic planning efforts are accelerated when strengths-based principles transform the traditional SWOT analysis into SOAR by focusing directly on those elements that give life and energy to the organization's future. SOAR provides a needed bridge from strengths-based theory to practice – highlighting key inputs, processes and outputs. Thus, SOAR enables individuals, organizations, business units and teams to create strategic plans in new ways by addressing the following key concern of most organizations: "How do we sustain the value, momentum, energy and commitment to see the plan implemented and achieve the desired results of the planning effort?"

A summary of the comparisons and contrasts between SWOT and SOAR is presented in Table 4. As stated previously, SOAR used SWOT as a foundation such that SOAR can be considered an evolution of SWOT. As shown in Table 4, SWOT is competition focused ("just be better"), whereas SOAR is potential focused ("be the best possible").

Table 4: Comparisons and contrasts between SWOT and SOAR

SWOT-Analysis	SOAR-Framework
Equal focus on Weaknesses and Threats	Focus on Strengths and Opportunities
Competition focus – "just be better"	Potential focus – "be the best possible"
Incremental improvement	Innovation and value generation
Top down	Stakeholder engagement
Focus on analysis and planning	Focus on planning and implementation
Energy depleting	Energy creating
Attention to gaps	Attention to results

Source: Adapted from p. 12 in J. Stavros and G. Hinrichs. (2009) Thin Book of SOAR: Building Strengths-Based Strategy.

Typically, once a SWOT analysis is completed, the next step is to recommend strategic alternatives for the organization to be competitive in its environment, create policies to link the selected strategy with implementation and put in place evaluation and control mechanisms to measure activities and performance results. These policies and guidelines provide clear guidance to employees for implementing the strategy in terms of programs, budgets and procedures. In some cases, an organization may use a leadership team to perform an initial strategic conversation of strengths and opportunities as a starting point. In this way, leadership provides its unique perspective and access to information to get beyond a "blank sheet" and move towards SOAR. The key with SOAR is to involve more than just senior leadership in the strategic thinking and planning process. Realistically, specific situations will determine which framework would be more useful, and there may even be cases where both SWOT and SOAR would be used together for strategic planning.

A valuable attribute of SOAR is that it nurtures a culture of strategic learning and leadership.

Why SOAR?

Since the August, 2007 issue of AI Practitioner, "SOARing to High and Engaging Performance: An Appreciative Approach to Strategy", there has been a growing demand for strategy to be more innovative and to be implemented more rapidly. (Isern and Pung, 2007)

> [An organization] must create and communicate a strategy and plan that invigorates their stakeholders with a shared set of values (ways to operate together), a vision (future direction), a mission (present purpose and organization offering), and set of strategic initiatives (foundations for goal and objective setting). Strategy is not a once-a-year review of budgets, goals and objectives or a quarterly ritual (Stavros and Wooten, 2011, p. 827).

According to the late Peter Drucker, "Strategy is not a goal; it is a direction, a blueprint for putting the pieces together and building. It must have continuous feedback to translate real-time results into refinements and changes as appropriate" (Edersheim, 2007, p. 40).

Need for a new assumption

As previously discussed, SWOT operates on the assumption that there is an environment in which the organization competes. When the SWOT analysis is complete, the "as-is" state of the organization's environment is defined. However, SWOT was designed in the 1960s, and it does not take into account the fluid design that requires stakeholder connections and aspirations to adjust to new information in a dynamic global environment. (Valentin, 2001)

What if the "as-is" state of the organization's environment is not the most effective state for strategic planning? What if, in addition to knowledge of the organization and its environment, one assumed that an organization is a socially constructed system in which there is a bidirectional relationship between stakeholders and the environment? (Smircich and Stubbart, 1985) This assumption of stakeholders impacting the environment and the environment impacting the stakeholders emphasizes the dynamic nature of a strategic planning process. SOAR focuses on just such a process, where the planning and implementation occurs from a whole-system perspective.

Need for a focus on positive strategy

In order for an organization to be sustainable in the 21st century, it must take advantage of opportunities, leverage internal strengths and efficiently use its human capital for building a society that enhances the organization and our planet. (Isern and Pung, 2007) Two global strategists, Gary Hamel and C.K. Prahalad (1994), have conducted research demonstrating that successful organizational leadership in many industries requires foresight in identifying future opportunities and action plans to build the capabilities (strengths) necessary to profit from these opportunities. Hamel and Prahalad have identified three attributes necessary for organizational success in the future:

1. An understanding of how competition today is different from the past

2. A process or approach for finding and gaining insight into tomorrow's opportunities

3. An ability to energize an organization top-to-bottom to support the long journey necessary to attain mission-centered goals

As a future-focused strategic planning process, SOAR strongly addresses these three attributes.

Need for organizational learning

A valuable attribute of SOAR is that it nurtures a culture of strategic learning and leadership by building a widespread Appreciative Intelligence. Tojo Thatchenkery (2006) explains that Appreciative Intelligence creates a powerful capability for high performance, creativity and innovation in people and organizations by reframing the present view, appreciating the positive possibilities in any situation and envisioning how the future unfolds from the present moment. These strategic factors can be identified from the stakeholders involved in the strategy-formulation process.

Highlights of SOAR applications

Since the creation of the SOAR framework in late 1999, the application of SOAR has offered a wide range of options to each organization that has adopted it to help them meet their strategic needs. Organizations' use of the SOAR framework ranges from strategy and strategic planning to coaching, leadership development, teambuilding and other areas. The broad categories of organizations and locations where SOAR has been applied are listed in Table 5. This demonstrates the growth of applications, the robust nature and the flexibility that the SOAR framework has gained over the last 13 years. Furthermore, organizations are adopting the SOAR framework every year at different levels including industry-wide, organization-wide, group and individual.(See Appendix 1.)

> What has engaged the employees most is the focus on the aspirations of its stakeholders – especially its customers.

Table 5: SOAR's global impact

Types of Organizations	Continents
For-profit organizations, at every level	Africa
Non-profit organizations	Asia
Governments	Australia, New Zealand
Non-governmental organizations (NGOs)	Europe
Education: primary, secondary and higher education	North America, South America

A global manufacturer – aligning aspirations, performance and results over six years

The CEO at a global manufacturer has told his employees that strategic planning is a core leadership process, but it does not occur just at the top of the organization. He believes that strategy can be created for an individual, within a functional area,

What do we want to become? What new capabilities do we need?

for a business unit, or across an entire corporation. At this global manufacturer, several functional areas and divisions are using the SOAR framework to guide them through strategic planning sessions to create strategic initiatives, strategies and business plans. What has engaged the employees most in applying the SOAR framework is the focus on the aspirations of its stakeholders – especially its customers.

The inquiry into aspirations includes employees, customers and suppliers. This inquiry encourages the discovery of innovations based on the stakeholders' shared values and desires, especially the needs of current and future customers. The stakeholders are engaged because they feel connected, focused and inspired. Rather than needing persuasion to cooperate, the employees are motivated to work with the suppliers and customers by the strategic initiatives that everyone has had a role in creating. This focus on the customer is not new at this company, as it has a long history of thinking beyond traditional boundaries when finding ways to better serve its customers. Having strategic conversations that involve values is consistent with the behavior of an organization that has been recognized by outside experts as being one of the most ethical companies in the world.

In every case, stakeholders have made it evident that SOAR is driving alignment, innovation and engagement. SOAR has been instrumental in developing departmental business plans, which are then translated into individual employee performance plans. This global manufacturer has been using SOAR for over six years and has found it to have a positive impact on their organizational sustainability. For the multiple stakeholders who have applied SOAR, the greatest impact they have observed is the aligned energy that helps execute business plans and achieve results. Throughout this company, SOAR has offered a flexible framework using a simple approach that invites the relevant stakeholders into the strategic planning process to create positive strategies with sustainable value. SOAR has helped this company design core business models to create momentum that results in value for all stakeholders. (Stavros and Hinrichs, 2009) The following story provides a brief illustration based on the 5-I approach.

A global aerospace organization – generating ownership and accountability
AST Division (formerly a US based company of 8,100 employees with revenues over $2 billion) was acquired by a global aerospace organization with over 88,000 employees and $25 billion in revenues. The divisional general manager was searching for a new approach to strategic planning for his recently acquired division. The manager suggested they use the SOAR framework. A team member had seen a video from the AI Commons of how the US Navy had successfully used AI to build leadership at all levels. (Barrett and Fry, 2005) This resonated with the organization because the US Navy is one of their major customers. The managers wanted to bring the strengths of the acquired division to the parent organization and the SOAR framework with its 5-I approach seemed like a good strategic fit to bring the division in alignment with corporate.

The five-year plan's objectives were translated into tactical plans with yearly goals that were clear, actionable, and measurable.

Initiate and Inquiry phase

Thirteen vehicle management systems (VMS) leaders participated in a three-day strategic leadership meeting to initiate the process and carry out the Inquiry phase of the SOAR framework. Thirty-five interviews were completed with key stakeholders: executives, program managers, business development, functional managers and customers. The main objective was to gather information to develop a five-year strategic plan that would include the major areas for growth and competitive advantage. The strategic Inquiry phase started with SOAR questions:

Strengths
Q. What are current vehicle maintenance systems strengths?
Q. What are the strengths of our current program management group?

Opportunities
Q. How do we expand our business base with new customers/new businesses?
Q. What new opportunities might we consider to develop/grow our business?

Aspirations
Q. How do we continue this organization as we grow?
Q. What do we want to become? What new capabilities do we need?

Results
Q. How do we improve the leverage that we have in our own supply base to achieve optimal results?
Q. How do we know when we are succeeding?

The VMS program used the responses to identify strengths, opportunities and the most preferred future – combined aspirations. The values demonstrated what the organization most values in its stakeholders, and the mission focused on customer service.

Imagine and Innovate phase

The Imagine phase created the following vision:

> Our vision: We will strive to be the premier innovator of vehicle maintenance systems solutions for a sustainable world.

The Innovate phase occurred in a three-day summit with cross-functional stakeholders from six operational units. They identified eight strategic objectives to align with the goal, visions and mission. These objectives were to be achieved within the five-year strategic plan.

Implementation phase

Tactical plans were created through dialogue with 50 key program professionals from three levels. This dialogue created ownership of the planning and implementation responsibilities to achieve the eight strategic objectives and provided

'Participants were amazed at the efficiency of SOAR … practical results and solutions seemed to fall into place.' Facilitator, Women's Hospital

the continuity and sustainability of the project. The planning and implementation teams met monthly for course corrections and presented their results. During this phase, sales increased by 18%. The team continued to identify, evaluate and pursue both the existing and emerging vehicle maintenance systems opportunities in the world market.

During the process from Initiate to Implementation, respect, engagement and ownership were evident. A SOAR approach called for a collaborative environment where people felt safe to suggest improvements and take risks with the customers in mind. The five-year plan's objectives were translated into tactical plans with yearly goals that were clear, actionable and measurable. The participants accepted accountability. The members from all levels, executive to staff, are continuing to have a positive spirit because they are asked for their ideas. They see the connection of their ideas to action plans.

The next story illustrates the scalability of SOAR to be applied quickly when needed to create a strategy for a project or initiative, i.e., Quick SOAR.

A women's hospital – generating results in a short meeting

A physician leader at Women's Hospital in Canada had an upcoming meeting with a group of physicians and midwife leaders to plan a process that would lead to the creation of a care-provider–hospital compact. A compact would outline the roles and responsibilities of both the administration/hospital and the care providers in a way that would align a shared vision of providing optimal care to the families served.

Participants in the planning meeting included the hospital president, the consultant experienced with care-provider–hospital compacts, a member of the hospital charitable foundation and representative midwifery and physician leaders from all parts of the hospital. By the time introductions were completed and the team brought up to date there were only two hours left in the meeting.

They bravely launched into a Quick SOAR. The goals of the Quick SOAR were:

- To explore the forces and factors that give life to the medical/midwifery staff in their work at Women's Hospital.

- To design the framework for a process to create a compact between care providers and the hospital that helps the whole organization become the best it can be.

- To provide an experience of the SOAR process for the leadership team so that they could evaluate if SOAR would work well for the compact process.

Visible outcomes: 1) The acceptance of new relationships and responsibilities at all levels; 2) Strategic change at individual, department, division, corporate and industry levels.

The following questions were asked of the participants:

1. What attracted you to our hospital?

2. Describe a high point experience at our hospital. This is a time when you felt most alive, most engaged and most proud of your involvement. What are the strengths we can build upon?

3. Envision a time in the future when there is complete and exciting engagement of all the physicians and midwives here. What would it be like to work in this place? What new innovations have occurred? How might this help our hospital be the best it can be?

4. As you think about the larger context and purpose of our hospital, what are the most important things (aspirations) that would result from a fully engaged medical and midwifery staff?

5. In designing a process that results in a hospital compact, what do you see as the top three to five ingredients that will make it exceptionally successful? How do we know we are succeeding (results)?

As the group reported out, the data were organized into Strengths, Opportunities, Aspirations and Results. At the end of the meeting, there was a clear idea of how to proceed with the project, and all participants were very happy with the process and end product. Despite the fact that this meeting occurred at night after a full day's work for everyone, they felt invigorated and satisfied. There were a few surprises. According to the facilitator:[2]

> The first one is how well the Quick SOAR went despite the inexperience of the leaders. This speaks to the integrity and adaptability of the framework. Second, it was discovered that SOAR innately produces engagement by creating an opportunity for dialogue, deep listening, and thus a sense of community and valued participation. Third, participants were amazed at the efficiency of SOAR. By starting from strengths and success and taking the time in the beginning to create a vision, the practical results and solutions seemed to fall into place. In contrast, the traditional approach of focusing on problems and solutions involves a lot of controversy, negotiation and compromise, which takes far longer and is hard work. Lastly, we had fun, we were enlivened and we were inspired.

Empirical studies emerging on SOAR

There are now hundreds of case studies on the benefits resulting from employing the SOAR framework. SOAR serves as a framework to help organizations dialogue about how best to build and deliver their UVO (unique value offering) through creating a positive strategy. This is supported by case studies published earlier. The visible outcomes from implementing and sustaining the SOAR framework can be:

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2 Personal communication via email on July 20, 2010.

- A clearer definition and communication of organizational values

- Clarity of vision, mission, goals and objectives

- Openness to new ideas and opportunities from the outside

- Self-confidence, self-reliance and self-respect at the organizational level

- An improvement in organizational capacity and individual and functional capabilities

- Stakeholder ownership and responsibility for the organization's existence and future

- A participatory strategic planning process where everyone is free to voice concerns and opinions while contributing to new ideas and action plans

- Creation of new knowledge that is practical and useful

- The consideration for important issues and needs of stakeholders

- The acceptance of new relationships and responsibilities that build strategic capacity at all levels

- Strategic change at individual, department, division, corporate and industry levels

There have been many more instances of SOAR functioning as one factor of many in a complex system that has produced significant benefits and results based on empirical studies completed since 2009 (e.g. doctoral dissertations and master theses).

In the next section, I will share four of the studies that have examined the impact of SOAR along with other independent variables in predicting positive outcomes for individuals and organizations. These are in the area of trust building, strategic capacity, flow and strategic planning.

SOAR and trust building for improved supplier performance

The first study, "A Study of the Direct and Meditational Effects of the SOAR Framework, Trust, and Environmental Management Systems on Chemical Management Services Supplier Performance at HAAS TCM Group," was conducted by Joe Sprangel in 2009.[3] In this study, the interrelationship was examined among SOAR, trust, environmental and chemical management services (EMS/CMS) and supplier performance among 71 program managers and customers at a global chemical management services (CMS) provider, the largest in North America. Program managers are responsible for managing, implementing and improving their respective CMS programs at assigned customer locations. The

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3 For more information on this study, please contact Dr. Joe Sprangel, Assistant Professor of Business, Mary Baldwin College, email: jsprangel@mbc.edu.

'Strategic capacity involves every individual member in the organization acting in relationship with others and the organization.' Malone

participants took a survey consisting of eight demographic items and 128 Likert-scale questions (items) given on a five-point scale. Likert-scale items measured four variables/constructs: supplier performance, SOAR, trust and EMS/CMS. (Sprangel, 2009)

Sprangel's study proposed how the elements of the SOAR framework can build trust and increase environmental performance to answer a question. The research question was: "How can a CMS program better manage implementation activities to achieve high levels of CMS supplier performance as measured by perceptions of program manager and customer supplier performance?" (p. 39).

The prediction was that supplier performance at the Haas TCM Group would be positively affected by the utilization of the SOAR framework, trust and EMS/CMS. The study also predicted that the effect of SOAR on supplier performance was likely to be moderated by the dimensions of trust and EMS/CMS. This study was carried by hypotheses testing using correlation analysis, multiple linear regression, Pearson product-moment correlation and Sobel's test for mediation. Subsequently, it was hypothesized that by applying the elements of the SOAR framework in such a manner to engage a whole system, dialogue, trust and EMS/CMS are developed to positively affect supplier performance.

The results support a combined framework in which utilization of the elements of SOAR built trust and pro-environmental behaviors to train suppliers to develop collaborative relationships with customers. There were two major findings. First, the results proved that supplier performance was positively improved by the use of the SOAR framework. Second, the effect of SOAR on supplier performance was mediated by the dimensions of trust and EMS/CMS. Dimensions of trust and EMS/CMS mediated the effect of SOAR on supplier performance. This study validated the role of the SOAR framework, trust and EMS/CMS on the desired outcome of improved supplier performance for a CMS program.

SOAR and building strategic capacity

'The SOAR framework can be utilized for ... individual coaching, leadership development, brand management, problem-solving, continuous improvement and conflict management.' Malone

Patricia Malone's (2010) research, "An Appreciative Exploration of Strategic Capacity and the Impact of the SOAR Framework in Building Strategy Capacity", explored a generative approach to strategy through the application of capacity building that views strategy as a "fluid, deeply embedded capability for thinking and functioning strategically" (p. 4). The research set out to answer five main questions:[4]

1. What is strategic capacity?

2. How can organizations build strategic capacity?

3. How can SOAR be utilized as a framework in building strategic capacity?

4 For more information on this study, please contact Dr. Patricia Malone, Finance Director, Energizer, email: prmalone@gmail.com.

4. How can SOAR contribute to strategy research?

5. How can this research study inform practice to create organizations that are more effective?

Malone completed 39 in-depth interviews with strategy and SOAR exemplars, along with supporting case study material to gain a comprehensive understanding of strategic capacity and how SOAR framework builds this capacity. The metacapabilites that support strategic capacity are:

1. Relational generativity

2. Learning

3. Sense-managing

4. Change capability

5. Combination capability, and

6. SOAR framework (p. 4)

SOAR fosters generativity, relationships, capacity building and learning. These metacapabilities lead to an increased capacity for strategic change that allows for combining and generating new capabilities to positively impact performance. Hence, the study's results are shown to build strategic capacity. Strategic capacity is:

> Strategic capacity can be defined as the ability of an organization to obtain its vision, mission and goals, ultimately leading to its sustainability. Strategic capacity involves every individual member in the organization acting in relationship with others and the organization (i.e. systems, structures, culture, leadership) in collectively making strategic choices (Grant, 2005) and dynamically building competencies and deploying critical resources (Hamel and Prahalad, 2005) necessary to successfully deliver the organization's contribution to its shareholders, employees, customers, and communities. In short, strategic capacity is a deeply embedded ability that enables an organization to bridge the gap between its current performance and its potential (Malone, 2010, p. 8).

This concept of strategic capacity represents an opportunity to reframe strategy that leads to the generation of new opportunities for "doing strategy". In this study, the SOAR framework was found to be "a versatile, simple, and powerful framework that can be utilized in a multitude of ways for applications such as strategic planning, leadership development, coaching, conflict resolution and continuous improvement among others" (p. 261). The study also demonstrated that SOAR framework can be utilized in both large and small groups to support strategy generation and implementation planning. From the data gathered, Malone summarizes SOAR as a framework that:

'The AI Summit was a watershed in the decade-old history of the school.' More

...engages the entire system (including all stakeholders) to build upon strengths, engage in possibility thinking, and expand participation in the development of SMART goals and objectives for strategy implementation. SOAR creates energy that informs action. The SOAR framework is very versatile, and can be utilized for many applications such as individual coaching, leadership development, brand management, problem-solving, continuous improvement, and conflict management. SOAR creates energy that informs action. SOAR also fosters learning and engagement and can be utilized as a shared learning system in many different applications. One example may be to better understand the voice of the customer through appreciative interviews and utilization of the SOAR framework. SOAR can also function as a sense-managing tool that enables individuals across the organization and multi-organizations to better understand the mission, vision, and strategies of the organization and relate them back to individual actions. Finally, SOAR elements have been tested based on suppliers' perceptions of their customers (Sprangel, 2009) and SOAR was found to build trust and promote better supplier development and partnership. SOAR can be utilized throughout an organization to foster trust and relational generativity (p. 263).

This study extended current theory and developed new insights on strategic capacity by exploring the meaning of the construct of strategic capacity and developing a theory and supporting framework for building strategic capacity. This study also makes a contribution in the realm of positive organizational scholarship (POS) through connection of POS to strategy and capacity building. To date, only two studies were found that extends POS to strategy. (Wooten and Crane, 2004, Wooten and Cameron, 2010) The findings of these studies support the application of SOAR framework while noting that Malone's study (2010) "builds strategic capacity of which positivity is a key accelerator" (p. 265) and "extends POS as a critical component for generative strategy" (p. 266).

SOAR and *flow*
Research by Michael Glovis (2012), "A Mixed Methods Study in the Expression of Flow, SOAR, and Motivation: Developing Individual Transcendence within the Delivery of Complex Systems Integration Projects" is the first known empirical analysis of flow in an SAP project environment. The focal point of this study was the convergence of flow, SOAR, motivation and the overarching importance of improving the occurrence of project success. The focus was on complex SAP system integration projects; however, the information provided by this study may be used to improve project success in most other project delivery initiatives.

The research question for this study was: "What is the impact of flow on SAP project success?" Three sub questions were:

- What is the role of SOAR in mediating the effect of flow on project success?

You can learn to build a capability and have the adaptive capacity to think from a strengths-based perspective.

- What is the role of motivation in mediating the effect of flow on project success?

- Can the eight elements of flow be cultivated to encourage intrinsic motivation that may result in the optimum experience phenomenon among team members during the delivery of complex SAP projects? The eight elements are: (a) clear goals, (b) immediate feedback, (c) balance between challenge and opportunity, (d) concentration, (e) being in the present, (f) control, (g) altered time and, (h) loss of ego.

There were seven hypotheses designed around the study research questions. The importance of successful projects to organizations initiated the consideration of factors that differentiate successful versus unsuccessful projects.

The concept of flow as proposed by Csikszentmihalyi (1988) piqued interest as both a solution and a research opportunity. The SOAR framework and its focus on strategy aligned nicely with this objective. The study results support the perceived assumption that flow is a phenomenon in and significant predictor of successful SAP projects. The study of projects and the factors contributing to their success are important, since projects provide the mechanism by which organizations implement strategies. Based on the results of this study, project stakeholders should consider the importance of flow, SOAR and intrinsic motivation in the delivery of successful projects.[5]

SOAR and AI for strategic planning with parents, teachers and staff
Chandramouli More conducted a study on a private school in India : "The Effect of Appreciative Inquiry as Organization Development Intervention on Organizational Planning and Service Quality Improvement in St. Francis School (ICSE)." More used the SOAR framework in a one-day group session in which 65 members representing different stakeholders participated. At the end of the day, the participants sketched out the organization's Strengths, Opportunities, Aspirations and measurable results as described below. The school's stakeholders were optimistic of transforming the school as a model center of high-quality academic learning. The school set forth concrete and measurable goals. Following the SOAR session, the researcher formalized four objectives for a study:

1. To further assess the existing Strengths, Opportunities, Aspirations and Results (SOAR) present in the school system;

2. To craft a three-year development plan for the school using SOAR framework;

3. To determine the pre-OD intervention level of service quality in terms of parents' satisfaction; and

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5 For more information on this study, please contact Dr. Michael Glovis, SAP Program Manager, SAP America, Inc, email: Michaelglovis@hotmail.com.

4. To determine the effect of OD intervention (ODI) on the service quality in terms of parents' satisfaction in the organization.

The data gathered to address the study objectives came from an AI Summit spanning four days that used the SOAR framework as the core ODI program. The findings showed that there was significant difference between the level of parents' satisfaction toward reliability, responsiveness, assurance and empathy. There was no significant difference between pre- and post-ODI on the level of service quality in the dimensions of fees.

More stated that "the AI Summit was a watershed in the decade-old history of the school. It created a positive atmosphere for change within the organization and inspired hope in the stakeholders with regard to the future. (More, 2011, p. 40). The process of crafting the development plan opened up a new collaborative and all-inclusive approach in school planning. The process has generated an appreciative and affirmative momentum among the stakeholders.

The AI platform permitted the one-hundred-plus stakeholders to forge enduring symbiotic relationships with each other. It also presented an unparalleled opportunity for the school management to interact freely with parents, teachers and the staff, and understand each stakeholder's actual needs, desires and expectations. Common grounds for working and commitment to a commonly co-created goal replaced whining and complaining.[6]

The SOAR Profile

The latest advancement of SOAR is the SOAR Profile[7], a new survey instrument that is being developed to evaluate strategic thinking capacity. (Cole and Stavros, 2013) The SOAR Profile is a self-report, rapid assessment instrument developed from the theory and empirical research on SOAR. It is designed to help individuals learn about and understand their strategic thinking capacity to improve individual and team performance that positively impacts the organization's performance.

The essence of the SOAR Profile is to describe how individuals approach strategic thinking. When a person completes the SOAR Profile, they will learn if they are naturally best at strategic thinking that formulates and implements strategy based on:

1. Identifying and building strengths

2. Creating innovations in the form of opportunities

3. Encouraging individuals and teams to share aspirations

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6 For more information on this study, please contact Dr. Chandramolui More, St Francis Institute of Management and Research and International Philanthropic Organization based in Mumbai, email: more007@rediffmail.com.
7 For further information contact the author directly at jstavros@ltu.edu.

4. Determining results to know if they are succeeding

We are learning from our research using the SOAR Profile that individuals can be naturally strong in one and/or all of the SOAR capabilities: strengths, opportunities, aspirations and results. Or, if you have a deficit in one area, such as not being strengths-focused, we know that this capability can be learned. Additionally, if you have a deficit in one area while working in a team, another team member's capability may offset what you have not yet fully developed. This means that you can learn to build a capability and have the adaptive capacity to think from a strengths-based perspective, and that there can be a member of the team who has the capability to be strengths-focused to balance the elements as a whole.

My colleague, Dr. Matthew Cole, and I have been conducting pilot research on the SOAR Profile and will be presenting it to the public at the ABAC-OD Summit 2013: SOARing to Positive Transformation and Change to be held at Assumption University of Thailand, Graduate School of Business on November 21-23, 2013. A special note of thanks to Dr. Perla Tayko, Organization Development Institute Director, Dean Phothikitti, and her colleagues, for bringing this opportunity together!

Conclusion

SOAR has been an important advancement to the research and practice of Appreciative Inquiry. The research and practice of SOAR continues to extend and elevate beyond its original design for strategic thinking and planning. Thanks to the research and practice of many people, SOAR's flexibility as a strategic framework continues to unfold with applications in leadership development, team building and coaching. Given the generative nature of our appreciative learning communities, the potential of SOAR remains to be studied and understood in many parts of the world.

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Appendix 1: SOAR Users and Strategic Projects

Users	Strategic Projects
BAE Systems	Created a division wide strategic plan after a M and A
Biological Conservation Charity	Created a strategic plan with priorities that served as a living document
Boeing	Used for executive development coaches
California Association Management	Determine executive behaviors/thoughts to influence strategic thinking and application of SOAR
CASE Western University	Created a strategic plan and new brand identity for the university
Cathedral Foundation	Gathered stakeholders together to design a plan to serve all its community members
DBC – National Healthcare Board	Applied appreciative strategy to co-create an engaging leadership team to create a shared vision for its national planning board
U.S. Department of Justice	Created a strategy to outsource IT and restructure
Esperanza School District	Built capacity for a sustained action plan
Fairmont Manufacturers	Discovered sustainable manufacturing solutions
Figge Art Museum	Connected the governance team and operations team in a strategic plan that would address sustainability
First Baptist Church	Created a strategic plan for the church
FCI Automotive	Discovered a strategy to improve supply chain management and inventory quality
Girl Scouts USA	Created a strategic planning without the position of the president being filled based on the involvement of its stakeholder
Haas TCM Group	Demonstrated SOAR can increase trust, EMS, and performance in CMS
Hayes-Lemmerz – Cadillac	Made the plant more profitable while decreasing operational costs and improving plant efficiencies
Hospital and Health Association of Pennsylvania	Built strategic capacity for better work and care in six hospital project
Huntsman Cancer Institute	Engaged stakeholders in strategic planning process

Users	Strategic Projects
Illinois Association of Community Action Agencies (IACAA) and Eastern Illinois Community Action Agency (EICAA)	Formulated and implemented a new strategy. The major goals were for culture change and to achieve speed for change
Innovation Partners International	Created strategy mind maps and strategy on a page for their clients
Jefferson Wells	Engaged the whole practice in appreciative management, leadership, and strategy development and execution
John Deere	Aligned strategy at corporate, business and functional areas, and executive coaching
Lawrence Tech University	dentified the core values, vision, mission and strategic initiatives of the university to support the Master Campus Plan
Metropolitan Library System and many member libraries of Chicago, Illinois	Integrated the Chicago metropolitan library system. Strategic planning and patron engagement for member libraries
Northern Essex Community College	Created a three-year strategic plan for a community college
Orbseal Plymouth Tech Center	Aligned a newly created technology center with corporate strategy
Positive Change Core	Co-created a strategic plan for a start up social profit organization dedicated to bringing strength-focused whole system approaches to school communities
Private Equity Firm	Created a more future-focused approach to strategy development and test ideas during strategy sessions
ProHealth Care Clinics	Facilitated a merger, create a new leadership team and create the combined strategic plan
Quad City Bank & Trust (Davenport, Bettendorf, Moline, Rock Island and the Quad Cities Area of Iowa and Illinois)	Provided an innovative strategic plan
Quad City Interfaith	Gathered together diverse churches to address social issues in the community cooperatively
Roadway	Engaged its unionized workforce and management into strategizing about the company's future

Users	Strategic Projects
St. Francis School (ISCE) – India	SOAR used to develop a long-term plan for holistic and sustainable growth in the school
SAP Professionals	SOAR was found to influence project success with systems application and products (SAP)
School systems (too numerous to list)	Gathered a community together to co-create strategy and constructive accountability to improve the school system
Stepan Company (B2B company)	Created a global company vision, mission and strategy
Tendercare	Identified the positive care core to increase census while placing the residents, family members and community in the center of the quality care circle
Textron	Created a strategic plan for its Fastening Division focused for growth and redefinition of its commodity products
United States Agency for International Development	Launched a strategic planning session and three-day strategic planning retreat
U.S. Cellular	A longitudinal project that focused on implementing culture change to create a dynamic organization
Utah – Education Association	Built collaborative alliances with private and public educational groups that best supports a vision of "Moving Every Child Forward"
V&V Supremo Foods	Provided an innovative strategic plan and helped create a more effective top leadership team
VanderVeer Botannical Park	Created a strategic plan and engage board members at a higher level
Women's Hospital, British Columbia, Canada	Create a care-provider hospital compact (Quick SOAR)

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Purpose of AI Practitioner

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