OLIVIA TINCANI

STRATEGIC PLANNING
SOAR Visioning Exercise

GOALS

Envision the Strengths, Opportunities, Aspirations and Results for your personal and professional identities. Map your personal and professional visions of the future. Lay the groundwork for creating a path towards your Strategic Plan: Core Values, Mission Statement, Strategic Objectives and an Action Plan to achieve them.

BACKGROUND

For many years, strategic planning was performed by the top leaders of businesses without any input or participation by the people who actually carry out the plans. Leaders used a method of assessing an organization's Strengths and Weaknesses (internal matters) along with Opportunities and Threats (external matters) to craft the plan; the SWOT approach.

Best practice offers two fundamental changes to this conventional approach. First, rather than using the SWOT as the foundation for planning, best practice suggests a more positive-focused approach. Turn the SWOT into SOAR: Strengths, Opportunities, Aspirations (what is our preferred future) and Results (what will it look like when we've succeeded). This intentionally positive, future-focused approach has a number of benefits: it is more results-oriented, creative instead of fearful, values-based as opposed to reactionary, and optimally leads to open dialog and meaningful conversations.

Secondly, involve as much of the organization as possible, in appropriate ways. Utilize the experience and wisdom of the entire organization, not just the owners or leaders.

The process typically has four main steps:
1. Establish the organization's Core Values.
2. Define the Core Purpose or Mission.
3. Create the Vision or Future State.
4. Develop the Strategic Objectives and Action Plans to get there.

The strategic planning process starts by focusing on the strengths of an organization and its stakeholders' values and shared vision. The implementation of the plan relies on a steady, real-time assessment of measurable results and a willingness to make necessary adjustments and corrections. The strategic plan revisions are then based on current conditions (almost always changing) within the framework of the organization's core values and strengths (rarely or never changing).

Property of Olivia Tincani & Co., LLC - oliviatincaniandco.com

THE SOAR EXERCISE

After having completed the Core Values exercise and prior to the Strategic Plan Crafting seminar, please fill out two separate sheets of paper, each divided into four quadrants per page. The first page should be your personal Strengths, Opportunities, Aspirations and Results you hope to create in your future. The second page should be a SOAR for your business/farm/organization. Ask yourself the following questions to come up with your S's, O's, A's and R's:

- **Strengths**: What can we build on? What are our assets? What do our strengths tell us about our skills? What makes us unique? What are our proudest achievements in the last year or two? How do our strengths fit with the realities of the marketplace? What do we provide that is "world class" for our customers, our industry?

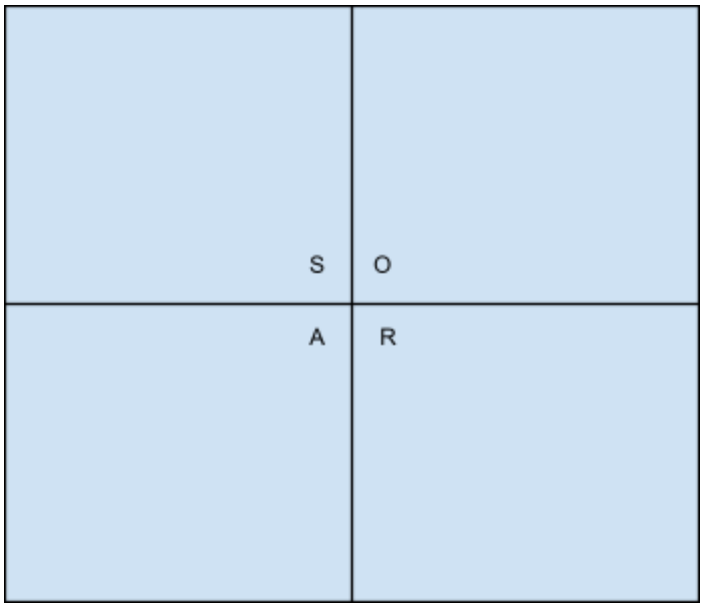
    * A note on assets: think through your assets in terms of types of capital beyond money/financial. In regenerative businesses, we must also measure our successes based on growth in alternative forms of capital. Think of your strengths/assets in these other categories: Intellectual, Spiritual, Social, Material, Living/Natural, Cultural, Experiential, longside Financial Capital. For further reading see this article.

- **Opportunities**: What are our stakeholders or customers asking for? What is the market context asking for? Which assets are not being full taken advantage of? What skill sets are underutilized? How can we reframe a perceived threat, weakness or challenge to see it an opportunity? What is the enterprise asking us to do? How can we best meet the needs of our customers, industry stakeholders, employees, community?

- **Aspirations**: What do we care deeply about? When we explore our Core Values and our Aspirations, what are we deeply passionate about? Considering Strengths and Opportunities, where should we go in the future and who should we become?

- **Results**: How do we tangibly translate our Strengths, Opportunities, Aspirations? How do we know we are succeeding? What measures would indicate that we are on track in our business? What are 3-5 indicators that would tell us our that business is succeeding with a quadruple bottom line vision of profit, people, planet and purpose?

Sheet Example:



Please try to be as specific as possible. For instance, rather than listing 'generate more revenue' as a result, focus on a specific goal such as "Increase revenue by $10,000 annually through X product/service/program/initiative which takes advantage of Y resource and Z asset." Avoid generalizations and stay shorthand.

Have the two sheets side-by-side when you do this exercise as filling in one sheet informs what resides on the other. If you find overlaps, don't be afraid to put them on both personal and organization SOAR sheets. You can do this exercise analog or digital, on computer or on paper, whatever is going to allow you to be most creative and comfortable. Give yourself permission to think BIG. Bring both sheets with you to the Strategic Plan Crafting Seminar. Estimate around 2-3 hours to complete both SOARs.

Core Values: Create running list of ideas of any new Core Values alongside your existing Core Values from the prior exercise. Distinguish between strengths and core values -- strengths are current assets and skills and core values are never changing beacons of our identity. Place concepts in core values category when necessary.

INSPIRATION

We want to understand the landscape of inspiration that motivates your work and life:

- What can we learn from businesses, organizations, operations and people that inspire your vision?
- What wisdom can we glean from these to help shape what you AND your business becomes?
- Who do you want to be like, and who do you NOT want to emulate and why?

Come to the table with the patchwork quilt of your inspirations for us to utilize in our Strategic Plan crafting: Make a list of people, farms, businesses, organizations in and outside of your sector that inspire you. List a word or two next to each as to why you find inspiration in the entity, and consider whether it's because you feel admiration and want to aspire to them, or because you are already aligned/similar in many ways.

MEDITATION

- Change requires action.
- Action requires a plan.
- A plan requires a strategy.
- A strategy requires goals and enabling objectives.
- Goals and objectives require a mission.
- A mission is defined by a vision.
- A vision is set by one's values.