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STRATEGIC PLANNING
SOAR Strategic and Action Plan Crafting Instructions

GOALS

Review, prioritize, clarify and refine your S-O-A-R's to connect the dots between personal and professional visions of the future in order to craft Strategic Objectives for the next finite period of time. Refine Core Values, Mission and Vision statements, Benchmark Measures of Success and an Action Plan to achieve your Objectives in a complete 1-pg Strategic Plan.

INSTRUCTIONS

The process of transforming your SOAR and Core Values exercises into a Strategic Plan will take a number of hours spread out over a few days.

These are your detailed instructions as to what to do directly following your Core Values and SOAR exercises. You must have completed both before getting to this step. We suggest doing those exercises and beginning Plan crafting 1-2 weeks after your exercises so that your reflections are fresh, but so as not to occupy too much time in any given week for strategic planning work. Earmark at least a day and a half, or three separate half days, for this thinking work. Ideally you concentrate your time into a few half days in order to be able to take the work far in a single session, while being realistic about other daily commitments and without burning out. This should give you plenty of time to get creative and immerse yourself in the process. Avoid working on the Strategic Plan for an hour or two at a time during a regular work day, as it will limit your ability to get creative, think big, and pursue slower more nuanced reflections and thoughts. Although it isn't necessary, as with the SOAR exercise, consider the possibility of going away to an inspirational private location or space, or making a mini retreat out of this, in order to be able to fully focus.

TURNING YOUR SOAR INTO STRATEGIC OBJECTIVES

Review: Read and reflect on your Core Values and SOARs silently. Pay attention to how commonalities within both personal and professional grids appear.

Prioritize : Projecting within a limited time frame -- we suggest 1 season or 1-2 years -- choose 6 total concepts from both personal and professional grids in each quadrant (6 each from S, O, A and R but from EITHER personal or professional sheets) and place in a single, new SOAR grid. Within the SOAR quadrants, set aside any that are not most important, but know they won't be forgotten. Underline what is most valuable and elevating. Look at outliers, and note their uniqueness. Find themes and overlaps and group concepts together before selecting your 6.

Clarify : Emphasize specifics in each concept -- richness comes from extraction of clarity, specifics and details in each. Ask yourself these questions: Has this revealed anything in the review and retelling of these concepts? Have you learned something in this process of prioritization and clarification, or are you just revisiting your same thoughts from the SOAR exercise?

Core Values: Create running list of ideas of any new Core Values alongside those from the exercise. Strengths are current assets and skills and across all forms of capital and core values are never changing beacons of our identity. Distinguish between Strengths and Core Values and pluck out steadfast concepts and place in Core Values list when necessary.

The FIRE List: Questions/Weaknesses/Threats: Create a list of the recurring questions and threats to what are emerging as your priorities. This is will lead to a miniature risk assessment of the chosen priorities as it may cause us to choose different priorities once we articulate the questions and concerns, looking at tenable risks. How do we understand outside threats? What feels unknown

or scary? What could wreck, deter, delay any of our Aspirations or diminish our Opportunities or sidetrack our Strengths from being fully utilized? What are we dependent on? What are clear impediments to our desired Results?

Affinity Mapping : Move together similar concepts, bundling concepts together and finding overlaps. Look at and move outliers to the side. Set aside any that are not most important, but they won't be forgotten. Find themes, patterns, and overlaps and group concepts together. Investigate those outliers, and note their uniqueness.

Choose : Make choices between the 6 concepts on your new grid in each quadrant. Don't discount any of what has been listed but elevate which is more important, and then make selection based on what you want to do first. Circle 2-3 in each quadrant. Further inquiry: do you feel and see patterns here?

Connect the Dots : Create a Z line to connect the concepts in each of the 4 quadrants and link each concept to another one in a separate quadrant, seeing how they connect and feed into each other. Think in S-O-A-R order, almost crafting a sentence for each one: each Strength facilitates or supports answering an Opportunity, which is matched with an Aspiration, and produces a Result. Often times it's easier to start with results. This is the path to moving us forward in our 3-5 final Strategic Objectives. Ideally we limit these Objectives to 3 if possible.

STRATEGIC PLAN CRAFTING

Refine & Articulate Core Values

Edit and review and respond and reflect on your SOAR during your re-writing of Core Values:

- Utilize our Core Values exercise and any Core Values that surfaced during your SOAR exercise.
- Create 1 sentence or a few short phrases that describe and define what the Core Value word means to your business. Give the word context and definition.
- Edit to 3 if possible and refine no more than 5 for your business/organization/idea.

Mission

Edit and review and respond and reflect on your SOAR experience to craft a single statement that expresses the soul and sole purpose of your business. It describes who you are and what you do in a simple, accessible phrase. To incorporate Holistic Management techniques, this statement overlaps with a Statement of Purpose, Quality of Life statement(s) using your Core Values to create an expression of the way you want your lives to be within the whole under management. Your Mission is the why behind what you will do TODAY to achieve success for you and your business.

Vision

Your vision is a description of the FUTURE, the vision of tomorrow's environment that will sustain your defined mission. This statement describes the future state (of resources, actions, experience, SUCCESS!) you see that your business can accomplish. It is the result that your hard work realizes. To incorporate Holistic Management techniques, your Vision is your future resource base, and how you must function to achieve the success you see as your mission and uphold your core values.

Strategic Objectives

Using the dot-connected SOAR pathways, craft 2-3 Objectives to achieve within the timeframe of this upcoming year/season. Focus on the Objective first, then create specific strategies for achieving them that are very practical. Consider them in terms of best practices: this may help fine-tune the wording.

- Highlight words in red that are the S, O, A and R from the SOAR exercise.

- **Example**: Using our SOAR word for Strength we will aim to take advantage of SOAR word for Opportunity to achieve or work towards our SOAR word for Aspiration and meet the goal of SOAR word for Results
- Prioritize the 2-3 Strategic Objectives in order of importance/priority. This will help in future decision-making if and when one comes up against another in day-to-day business decisions.

Risk Assessment: Review the FIRE list: Refer to your Fire List of threats, weaknesses and risks during the crafting of your Objectives as a reminder of the scary stuff, the unanswered questions, and the doubts that may deter you as you formulate and refine your Strategic Objectives. Conduct a small risk assessment of your chosen 3-5 Strategic Objectives. Your Fire List may cause you to choose different priorities once you articulate unanswered questions and concerns, and look at tenable risks for each, and may actually change your chosen Objectives slightly or entirely.

Review Inspirations

Review your inspiration list after having formulated your draft Strategic Objectives. What about your inspirations is inspiring? Their business skills, their farming/ranching know-how, their social media followers, the ethics behind their business, their location....why are they at the top of your list? Do certain inspirational colleagues shine brighter now that you have some rough objectives in mind for your business?

Action Plan

Create immediate next steps for achieving Objectives, and outline the entire path in correct sequence. This is how you will implement your Objectives and their associated Strategies. Define each precise action step you need to do to get to the end-goal of your Objective. Be as detailed as possible: these are the nuts and bolts to getting things done. The Objective is the umbrella, the Strategy is the course of motion, and Action Steps are the right order to achieve them. Think in order of what must happen next in terms of people, money, resources, time commitment, outreach, research, information gathering, etc.

- **Example Objective & Action Steps:** Using our SOAR word for Strength we will aim to take advantage of SOAR word for Opportunity to achieve or work towards our SOAR word for Aspiration and meet the goal of SOAR word for Results by doing Strategies X, Y, and Z.
    a. Strategy X
        1. Action step : Time, money, energy, and next steps to accomplish X
        2. Action Step: Time, money, energy, and next steps to accomplish X
    b. Strategy Y
        1. Action step : Time, money, energy, and next steps to accomplish Y

Benchmarks: Establish Measurements & Future Indicators of Success

Your Benchmarks are how you decide if you are living your Mission/Vision alongside achieving your specific Objectives. They should gut test your activities/accomplishments against your Action Plan as well as your Core Values and tell you if your activities continue to uphold Values, express Mission and Vision, and yet still accomplish the tasks to achieve Objectives in your designated timeframe.

Establish bullet point future indicators that describe how you, the business operations, the land, your community, your revenue, and/or some other metric/watermark will provide feedback that your Objectives are being achieved and that your Action Plan is both happening and working.

Your Action Plan has the quantitative elements -- time, money, energy -- of what each Objective and its Strategies takes to accomplish. Your benchmarks should be a qualitative measure of whether you are on the right path : the proof !

- **Example Benchmarks:**
  Using our SOAR word for Strength we will aim to take advantage of SOAR word for Opportunity to achieve or work towards our SOAR word for Aspiration and meet the goal of SOAR word for Results by doing Strategies X, Y, and Z.
  a. Strategy X
     1. Action step : Time, money, energy, and next steps to accomplish X
     2. Action Step: Time, money, energy, and next steps to accomplish X

     Strategy X Benchmark: do this by AA month, do that by end of year...
  b. Strategy Y
     1. Action step : Time, money, energy, and next steps to accomplish Y

     Strategy Y Benchmark: do this by BB month, reevaluate at mid year review...

Create the Plan

Format the above Mission, Vision, Core Values, and Objectives and their Strategies into a one-page Strategic Plan that you can use for multiple audiences: partners, employees, interns/apprentices, key stakeholders, investors, advisors, collaborators, Boards, and most importantly...YOU! Action Plans are usually kept outside of this shorter Plan document when presenting to an outside audience such as advisors or Board members.

IMPLEMENT THE PLAN

Implementation is the most difficult part of the strategic planning process. It's achieving the Strategic Objectives set out in the Plan while remaining alert and flexible to new opportunities as they unfold. Implementation relies on a steady, real-time assessment of measurable results and a willingness to make necessary adjustments and corrections. As in an ecosystem, it requires constant adaptation followed by careful observation and measurement: know how to change course, and then reflect to know why you did, and then adapt future plans based on observations.

Create a calendar of times during the year (we suggest at least quarterly, ideally monthly) to reevaluate where you are at with your Strategic Plan. This evaluation will then lead you to decide/adapt/act in future decisions to get closer to each Objective. Revisions are based on current conditions (almost always changing) within the framework of the organization's core values and strengths (rarely or never changing). Your goal is to integrate the results of strategic planning with daily, weekly and monthly routines. This may require a change in those routines.

How to Avoid Failure

- Use a calendar or Project Management System: Transfer your Action Plan to your agenda, Google calendar, Asana, Excel, or any other project management tool you like. Yes, it can be analog, just as long as you use it!
- Align your budget to annual priorities: Fund the change!
- Monthly check-in on overall progress of Plan in entirety (15 minutes): rereading your mission/vision, core values, objectives, action plan, and checking against your indicators of success.
- Stay committed to the due dates in your Action Plan: adjust as needed but don't let them disappear.

- Expand your skills: In the weeks and months following the planning process, dedicate time and energy to professional development and expanding your personal skills through training, recruitment or acquisition to include new competencies required by the Strategic Plan.

Stakeholder Feedback

Following editing and refinement, your Strategic Plan can and should be submitted to staff, Board, investors, partners, stakeholders, advisors, mentors, and meaningful contributors for review so that your current goals are understood. It is helpful and useful to get outside eyes on your strategic thinking and to incorporate creative ideas from business stakeholders.

If you are an operation with employees and managers, you can take your plan one step further and perform the entire SOAR strategic planning process with your team. Utilize everyone's vision, observations and aspirations to create one Strategic Plan for the collective that holistically expresses all strengths, contributions, creativity and goals. If this is something you'd like to plan for, please reach out to discuss team SOARing and strategic planning further.

OPPORTUNITY MAPPING & BUSINESS PLANS

Our Opportunity Map is an .xls spreadsheet of all products and services for all enterprises you are considering within your business model. It is an instrument to explore the operational realities of each in a kind of "business planning lite" exercise. In Opportunity Mapping, we identify products/services/enterprises/revenue streams that could be added to your existing suite of business activities to achieve short and long term goals. It allows you to establish a schedule for growth into future products and services that is determined by brand, operational ramp-up needs, schedule, funding/investment, long-term security and risk, team, and life balance. It reveals what you need to outsource and which skills or capacities to develop in house. Opportunity Mapping can be completed alone; can be used for any product, service, enterprise addition, expansion, or contraction; and can be conducted as frequently as desired.

A Note on Business Plans

This 1-page Strategic Plan can also be used as a starting point for a full business plan and can be utilized within an Executive Summary. It can also exist as an independent process, rejuvenated in an annual or semi-annual rhythm, with or without a preceding business plan. If there is interest in writing (or updating) a full business plan for the introduction of new enterprises, products and services, or for use to obtain funding, please reach out.

CLOSING MEDITATION

- You have talent, are original, and have something important to say and do.
- It is good to work. Work with love and like it when you do it.
- It is a privilege to get to do this.
- Be Bold, Be Free, Be Truthful, Be Beautiful.
    - Augmented from *If you Want to Write: A Book about Art, Independence, and Spirit by* Brenda Ueland, Writer (1938)