

# Columbia College SOAR Strategic Planning Tool

## Introduction:

Columbia College uses a variety of tools and approaches to assess organizational strengths and initiate change. In many cases a **SWOT** analysis (**S**trengths, **W**eaknesses, **O**pportunities, **T**hreats) can be utilized to seek feedback from various stakeholders to set future direction for the College. At Columbia we realize that each tool might have its limitations, therefore we welcome a variety of methods that help us review our internal and external contributors to serve our community better.

**SOAR** (**S**trengths, **O**pportunities, **A**spirations, **R**esults) analysis is another strategic planning tool used by Columbia that focuses on organization's current strengths and vision of the future to complement other tools we utilize in this area. Using SOAR, the College can engage all levels of the organization to focus on what is currently done well and build on our strengths to produce greater results. **SOAR** definitions are as follow:

**Strengths:** what an organization is doing really well, including its assets, capabilities, and accomplishments.

**Opportunities:** External circumstances that could improve surplus revenue, and threats or weaknesses reframed into possibilities.

**Aspirations:** what the organization can be; what the organization desires to be known for.

**Results:** The tangible, measureable items that will indicate when the goals and aspirations have been achieved.

Attached document provides a detailed description of the SOAR Strategic Tool and its required processes.



## SOAR (Strengths, Opportunities, Aspirations, Results)

### Description

A strengths, opportunities, aspirations, results (SOAR) analysis is a strategic planning tool that focuses an organization on its current strengths and vision of the future for developing its strategic goals.

This tool differs from the commonly used [SWOT \(strengths, weaknesses, opportunities, and threats\) analysis](#). SOAR engages all levels and functional areas of an organization, while SWOT is typically a top-down approach. With SOAR, the focus is on the organization and enhancing what is currently done well, rather than concentrating on perceived threats and/or weaknesses.

When conducting a SOAR analysis, the basic questions to be answered are:

1. What are our greatest strengths?
2. What are our best opportunities?
3. What is our preferred future?
4. What are the measurable results that will tell us we've achieved that vision of the future?

### Benefits

- Engages representatives from every level of the organization to have shared conversations and input on strategy and strategic planning. Resistance to change is minimized and employees are more likely to commit to goals and objectives they helped create.
- Flexible and scalable, so planning and decision making can be adjusted to fit an organization's needs and culture.
- Building on the organization's strengths produces greater results than spending time trying to correct weaknesses.

### How to Use

- Step 1.** Identify stakeholders who will participate, and determine the format and frequency of meetings (One large summit? A series of shorter meetings?). Participants should represent all levels of the organization and all functional areas.
- Step 2.** Create an interview questionnaire or guide for gathering information about strengths, perspectives, and aspirations of employees and key stakeholders.
- Step 3.** Engage employees and other stakeholders—including clients, vendors, and partners, if appropriate—to discover the conditions that created the organization’s greatest successes. Ask powerful, positive questions to generate images of possibility and potential.
- Step 4.** Threats, weaknesses, or problems should not be ignored, but rather should be reframed. Discussion should focus on “what we want” rather than “what we don’t want.”
- Step 5.** Summarize the organization’s positive core, which is its total of unique strengths, resources, capabilities, and assets.
- Step 6.** Identify aspirations and desired results that create a compelling vision of the future using the best of the past and that also inspire and challenge the status quo.
- Step 7.** Decide which opportunities have the most potential.
- Step 8.** Write goal statements for each of these strategic opportunities and identify measures that will help track the organization’s success.
- Step 9.** Plan actions and implement the plan for each identified goal.

### **Relevant Definitions**

*S = Strengths:* What an organization is doing really well, including its assets, capabilities, and greatest accomplishments.

*O= Opportunities:* External circumstances that could improve profits, unmet customer needs, threats or weakness reframed into possibilities.

*A= Aspirations:* What the organization can be; what the organization desires to be known for.

*R=Results:* The tangible, measureable items that will indicate when the goals and aspirations have been achieved.

## Example

A regional call center with 100 employees decided to use the SOAR approach for strategic planning. The center handled RSVP calls and data entry for various types of companies that planned meetings and events. Compared to other regional call centers within the same company, this center had average productivity and customer satisfaction with slightly higher employee turnover rates than in previous years.

The regional director organized a strategic planning team, which identified 10 key stakeholders at various levels of the organization, representing all functional areas of the call center. Within a few months, every employee was engaged to some extent in the strategic planning process.

Surveys were used to capture and compile data from employees and a few key customers to identify areas where the center was currently performing very well, and the circumstances under which positive feedback was received from customers. A series of focus groups were convened to uncover opportunities where additional enhancements to current services could be implemented. Discussions were held to identify specific items that could improve employee retention.

The core organizational strengths and assets were determined to be:

- The state-of-the-art technology used by the center
- An excellent training program for on-boarding new operations personnel
- Solid, long-term relationships with the top key business clients

Opportunities were identified to streamline the data entry process used while a caller was on the phone, and to enhance reporting of data back to the customer. It was found that routine calls were handled very well, but the process for handling non-routine inquiries contained gaps. The top reason for employee turnover was the lack of opportunity for advancement within the operations department.

The call center vision was developed, which included improved metrics for average call time, reduced dropped-call rates, and reduced data entry errors. Development of a senior operations role was recommended, and these employees would be expected to manage processes for handling the non-routine inquiries and expand the training programs for these areas.

Specific action plans were created across all functional areas with measureable goals to streamline the data entry process, enhance reporting of data to clients, implement a senior operations level to provide promotional opportunities for top performers, and implement additional processes and enhanced training programs for non-routine inquiries.

Within the first year, the call center had effectively improved its productivity by 15 percent, increased customer satisfaction metrics by 6 percent, and reduced employee turnover rate by 40 percent.

# SOAR WORKSHEET



## SOAR

**A process tool rooted in Appreciative Inquiry, designed to assess organizational strengths, and initiate change.**

**Please read the following to better understand what the SOAR tool is. Once you have read through the document, each person participating in the collaborative should:**

- Write down your response to the questions on the last page.
- Compare your response to the other responses on your collaborative team.
- Bring the sheet with you on November 6.
- At some point, ask all staff to review, provide feedback, and answer the questions.

**SOAR:** **S**trengths, **O**pportunities, **A**spirations, **R**esults Analysis

### **Description (from the American Society of Quality)**

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### **SOAR is about...**

- Action
- Strength based
- Be the best (good to great)
- Innovation
- Engagement
- Planning-implementation
- Results
- Plants seeds vs. pulling weeds
- Achieving the good vs. avoiding error

# SOAR WORKSHEET



## **SOAR Strengths: What makes us proud?**

- What makes us unique?
- What is our greatest achievement?
- How do we use our strengths to get results?
- How do our strengths fit in the health care environment?
- What about us is world class?

## **SOAR Opportunities: How do we make sense of the opportunities in our environment?**

- What are our stakeholders asking for?
- What are the top 3 opportunities to focus on?
- Who are our new customers?
- How do we differentiate ourselves?
- What are our new markets?
- Reframe challenges into opportunities.
- Are new skills needed?

## **SOAR Aspirations: What do we care deeply about?**

- Who are we/ who should we become/ where should we go?
- Most compelling aspiration?
- What strategic initiative would support our aspirations?

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

- Meaningful measures
- 3-5 Indicators for a score card
- Resources needed to implement

# SOAR WORKSHEET



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