

## SOARing Towards Positive Transformation and Change

**Dr. Jacqueline M. Stavros**

Associate Professor  
Director of Doctorate in Business Administration Program  
College of Management  
Lawrence Technological University, Michigan, USA

**Dr. Matthew L. Cole**

Assistant Professor  
Department of Marketing and Management  
College of Management  
Lawrence Technological University, Michigan, USA

### Introduction

In order to survive and prosper in today's challenging global economy, for-profit, non-profit, or government, organizations must create and execute strategy that delivers results and meets stakeholders' needs. In this more dynamic business environment, strategy must become more dynamic. Accordingly, strategy researchers suggest we need new ways to be innovative and rethink our strategy concepts, frameworks, strategic ways of thinking, and models for leading positive transformation and change in the 21st century. (Hamel & Prahalad, 1996; Hitt, Keats, & DeMarie, 1998; Kim & Mauborgne, 2005; Lowendahl & Revang, 1998; Stalk, Evans, & Shulman, 1992; Stavros & Wooten, 2011)

The SOAR strategic thinking and planning framework is a dynamic, modern, and innovative approach for framing strategic thinking, assessing individual and team performance, building strategy, and creating strategic plans. SOAR stands for *strengths, opportunities, aspirations, and results*. As a framework, SOAR focuses on the formulation and implementation of a positive strategy by identifying strengths, building creativity in the form of opportunities, encouraging individuals and teams to share aspirations, and determining measurable and meaningful results.

This article presents the SOAR framework's evolution from the fields of strategy, organization development and change, and Appreciative Inquiry (AI) to the discipline of positive organizational scholarship (POS). POS is "an umbrella concept used to unify a variety of approaches in organizational studies, each of which incorporates the notion of 'the positive'" (Cameron & Spreitzer, 2011, p.2). The 'positive' in POS asks scholars and practitioners to view the world through a lens where weaknesses and threats are reframed as strengths and opportunities, and 'organizational' refers to positive states of organizing. The premise of POS was both necessary and essential for creating the SOAR framework so that positivity could elevate and extend the capabilities of individuals to perform, change, and transform their teams and organizations. Organizations that are

using SOAR are experiencing the advantages of following a strengths-based, solution-oriented approach to strategic thinking which we are defining as:

...a distinctive management activity whose purpose is to discover novel, imaginative strategies which can rewrite the rules of the competitive game; and to envision potential futures significantly different from the present. Furthermore, strategic thinking is conceptual, systems-oriented, directional, and opportunistic. (Goldman, 2007, p. 48)

The article concludes by introducing the latest development in the theory and empirical research on SOAR, the SOAR Profile, which is a new survey instrument that we have designed to measure and understand one's natural strategic thinking capacity. By identifying an individual's strategic thinking capacity, the SOAR Profile measures the amount or capacity of strategic thinking focused on both the capabilities and desired outcomes of an organization, and also the relationships involved with achieving these outcomes. The SOAR Profile leverages the close connection between strategic thinking capacity and SOAR. At the heart of the SOAR framework is the ability of organizational members to think strategically and frame strategy by inquiring into the organization's positive core—the sum total of the organization's unique strengths, assets, networks, resources, and capabilities—to create a future (Cooperrider, Whitney, & Stavros, 2008).

## **The Emergence of SOAR**

### **The Evolution of Strategy Research**

Over time, the evolution of strategy research involved studying strategic planning processes and the configurations and positioning of organizations (Frederickson, 1990). Chandler (1962) highlighted the importance of structure as the vehicle through which organizations administer strategy. Following Chandler's research, other scholars continued to link strategy with structure by studying the impact of strategic planning on organizational configurations (Miller, 1986) which are a function of the type of organization, the environment, the industry's lifecycle, and the organization's age. By thinking about the different potential configurations of an organization, strategy researchers began to explore the structuring of mutually supporting and interrelated practices in an organization that enable it to achieve internal harmony and adapt to the external environment (Miller & Mintzberg, 1984).

As the configuration perspective of strategic management was developing, other strategy researchers began to focus more on the content of strategy and how organizations use strategy for competitive positioning within an industry (Frederickson, 1990). Michael Porter's 1980 book, *Competitive Strategy*, became the focal point for this perspective by looking at how industry-forces shape an organization's strategy. From this viewpoint, market structure and desire to find a niche within an industry dictate the position of strategy and structural factors in determining and explaining an organization's performance (Hofer & Schendel, 1978).

Embedded in these various schools of strategy research is the idea that strategy is a rational, leadership-driven process that should be comprehensive, analytical, and involve tasks such as market research, competitor analysis, and the alignment of internal resources with an organization's external environment (Allison, 1971; Mintzberg, 1978; Porter, 1980). Moreover, the classical perspectives of strategy created an artificial formulation-implementation dichotomy that segments strategy formulation from strategy implementation by separating the planners from the doers (Barrett, Cooperrider, & Fry, 2005). Yet, researchers acknowledged that, in practice, strategy formulation and strategy implementation are intertwined dynamic processes that involve the entire organization (Hart, 1992; Selznick, 1957; Westley & Mintzberg, 1989). Furthermore, the success of strategy requires involvement of organizational members beyond the leadership ranks because these are the people responsible for co-creating and executing the strategy (Bower, 1970; Hauden, 2008; Wooldridge & Floyd, 1990). The SOAR framework evolved from these fundamental strategy researchers by bringing in more than just a top-down approach to strategy formulation and implementation, it also embraced the concept of strategic thinking as a synthesizing process that utilizes systems thinking, creativity, and vision to positively impact an organization's performance.

### **Linking Strategy and Organization Development (OD) Research**

As the strategy field evolved, organization development (OD) researchers became interested in integrating the two fields. OD emerged from research at the National Training Lab on group dynamics, behavioral sciences, and experiential learning. Research on OD emphasizes systemic change in the character and performance of an organization (Cummings & Feyerherm, 2005). The character of an organization reflects the pattern of exchanges between the organization and its environment through the design of internal practices and structures that produce the organization's desired service or product. An organization's character directly influences its performance and measured outcomes, such as productivity, return on investment, customer satisfaction, and employee engagement.

OD scholars contend that their research and practices offer the field of strategic management a lens for exploring processes associated with formulating and implementing strategy. However, the focus on human process issues has somewhat excluded important strategic content issues (Worley, Hitchin, & Ross, 1996). In contrast, a large segment of strategic management research has omitted the mechanisms that explain the behavioral and structural forces that provide an organization's direction for its strategic initiatives (Buller, 1988). Integrating both perspectives provides a dynamic view of strategy making by emphasizing both the content and process of strategy making that enables organizations to engage in rapidly-changing global environments (Barrett, Cooperrider, & Fry, 2005; Greiner & Cummings, 2009).

From this blended lens, strategy-making processes are built into systems designed so that strategic behaviors are institutionalized throughout the organization by members assessing the environment, sharing knowledge, and choosing the right direction. Coupled with this lens is a mindset that highlights the importance of including an organization's human capital, managerial style, and culture as components in the strategy-making process (Buller, 1988; Thompson, Peteray, Gamble, & Strickland, 2014). This mindset is a byproduct of a learning organization that values the process of strategy making by

listening to different voices, engaging in reflection, and creating systems to synergistically combine personal and team mastery for collective strategic action (Barrett, Cooperrider, & Fry, 2005; Senge, 1990). SOAR invites a broad representation of stakeholders into the strategy formulation and implementation process, i.e., individuals who have a vested interest in the success of the organization. Examples of stakeholders are the employees and customers of an organization, as well as board members, suppliers, and community members.

An important characteristic of the SOAR framework is its ability to invite a broad representation of stakeholders into the strategic conversation and planning process. SOAR engages the stakeholders in conversations to inquire into strengths, opportunities, and aspirations to create shared values, vision, mission, goals, strategies, and results. Relationships among stakeholders are of great interest to strategy theorists, as is the diversity of stakeholder interests represented within those relationships.

Of recent interest is the ability of organizations to activate the member's sense of self at the organizational level through articulation of a compelling *shared* vision and mission (Stavros & Seiling, 2012; Thompson et al., 2014). This sense of self at the organizational level is perceived to occur through a model of cooperation that features both a self-oriented and other-regarding process of stakeholder involvement, and an authentic connection to others, which makes it possible to process a broader self-orientation *with others* while creating a moral tension between self-interest and the interests of others (Jones et al., 2007; Eisen, 2010). Doing so in the strategy development process makes it possible to reach strategic decisions that positively impact the six major categories of resources that create organizational capability and capacity: financial, physical, human, technological, reputational, and organizational (Grant, 1991; Hofer & Schendel, 1978). Thus, a framework such as SOAR that includes stakeholders' participation is vital to expanding these resources.

### **Positive Lens of Strategy**

The foundations of traditional strategy and OD research open the door to explore strategy from a Positive Organizational Scholarship (POS) perspective and provide an alternative way of thinking about strategy research and practice. From a POS perspective, the core of a strategy is a set of processes that enables collective resourcefulness and generative dynamics that lead to positive states or outcomes (Barney, 1986; Glynn & Dutton, 2007). A POS strategy perspective also takes into account emergent and planned strategies that capitalize on the full human potential within an organization by engaging the hearts, hands, and minds of its members (Malone, 2010). By incorporating emergent and planned strategies, a POS lens assumes that a strengths-focused strategy is generated in real time to proactively create and capitalize on both forecasted and unforeseen opportunities. This requires agile organizations that can translate and use the knowledge acquired for strategic decision making and that are flexible enough to rethink the relevancy of its current strategy, structure, resource allocation systems, and culture (Edersheim, 2007; Hitt et al., 1998).

Exploring strategy from a POS lens also considers the authenticity of an organization's strategy by extending beyond "business as usual" to craft an identity that

maps out the possibilities and actions for the organization by improving both its moral good and business outcomes (Friedel & Liedtka, 2007). This shift from self-interest to understanding how the organization is connected to the macro-environment builds authenticity (Drivers, 2006). Bringing authenticity into the strategy-making process seeds the roots for engagement by blueprinting a meaningful journey that allows stakeholders to recognize their contributions make a difference (Hauden, 2008). We have witnessed the power of SOAR to elicit both organizational learning and authentic strategy in organizational stakeholders, especially the employees, who want to experience positive business outcomes, i.e., success and meaning in the work delivered to customers. The SOAR process connects the dots between stakeholder values and organizational efforts to transform and achieve positive business outcomes. SOAR mediates the essence of organizational learning through strategic dialogues that invite the organization's stakeholders to construct its future through collaboration, shared understanding, and a commitment to strategic actions that bring positive change.

Like strategy, OD and POS, SOAR has a trajectory that crosses many connections and developments across the human and management sciences for a positive revolution in change and transformation, including the foundations in AI and strengths-based management. We therefore turn our attention to explain how SOAR leverages the AI philosophy.

### **Leveraging Appreciative Inquiry (AI) in the Development of SOAR**

There is a close connection between SOAR and positive strategy. This progress was made possible through AI which is best known as a positive approach to addressing issues that have been used successfully throughout the world in recent decades. Briefly, AI posits that “human systems move in the direction of the questions they most frequently and authentically ask; knowledge and organization are intimately interwoven, what we know and how we study it has a direct impact on where we end up” (Cooperrider & Godwin, 2011, p. 740). AI is vital to the emergence of the SOAR framework and the understanding that we should design strategy based on an organization's strengths, opportunities, aspirations, and results.

SOAR leverages AI philosophy and creates a strategic framework which makes it possible to look at the *positives of organizations* through the eyes of stakeholders. AI is a change philosophy with a 4-D cycle approach (i.e. discovery, dream, design, and destiny) that builds on an organization's strengths and on the positive core of the organization. AI's assumption is:

Every organization has something that gives it life when it is most alive, effective, successful, and connected in healthy ways to its stakeholders and communities. AI begins by identifying what is positive and connecting to it in ways that heighten energy, vision, and action for change. (Cooperrider, Whitney, & Stavros, 2008, p. xv)

AI is being used world-wide in both small- and large-scale change initiatives. The research in AI demonstrates that creating positive images by shifting to an appreciative perspective results in positive images and actions that are powerful, effective, and

sustainable (Cooperrider, 1999). This research has been disseminated in a variety of formats on the AI Commons (case packs, video clips, podcasts; visit <http://appreciativeinquiry.cwru.edu>).

Originally developed by David Cooperrider (1986), AI rests on five core principles: constructionist, simultaneity, poetic, anticipatory, and positive (additional information available at <http://appreciativeinquiry.case.edu/>). This article briefly recognizes the role of these five principles of AI in developing the SOAR framework. Individuals who practice these principles will experience their relevance in creating strengths-based relationships and positive success in their life, in organizations, and in communities (Stavros, and Torres, 2005).

**Constructionist principle.** The constructionist principle is an understanding and acceptance of the social constructionist stance toward reality and social knowledge. This stance presumes that real-world beliefs are created through social relationships and conversations that shape how the world is viewed, how people should behave, and ultimately what is accepted as reality. This principle states that knowledge about an organization and the destiny of that organization are interwoven. Beliefs and perceptions of the truth about an organization, and the ability to reflect on how the beliefs were generated, affect individual behavior and the way change is approached in that system. The first task of any organization change process is inquiry, i.e., learning and making sense of what is believed and said about the system. Thus, the *way* we know can shape a positive or negative future for the organization (Gergen, 1995). SOAR frames the development of strategy around a strategic inquiry with an appreciative intent. This means that the future of the organization is designed around its strengths and potential. The constructionist principle is a powerful contributor to strategic thinking and planning that can create, through the SOAR framework, the best future possible for the organization.

**Simultaneity principle.** The simultaneity principle works in harmony with the constructionist principle in a realization that *inquiry is change*. The essence of this principle is that the first question we ask is fateful in that the organization will turn its energy in the direction of that first question, whether *positive* or *negative*. As a result, the seeds of change are embedded in the questions we ask. This principle recognizes that inquiry and change are not separate moments but are simultaneous. Thus, inquiry actually becomes the “intervention” so that the questions we ask set the stage for discovery; what we “discover” creates the stories that lead to conversations about how the organization will construct its future. The SOAR framework has been impacted by AI’s simultaneity principle by maximizing the efficacy of inquiry in creating positive, strengths-based change since SOAR-based questions are all strengths-based.

**Poetic principle.** The poetic principle invites individuals to recognize that the meaning and energy generated in conversations depend upon the point of focus of the conversation. This principle recognizes that stories (like good poetry) can be told and interpreted about any aspect of an organization’s existence. These stories represent the organization’s past, present, and future as endless sources of learning, inspiration, and interpretation, just as a good poem is open to endless interpretations. This provides an opportunity for dialogue to enhance values and elevate an organization’s spirit and work.

For example, when individuals and team members engage in conversations that address moments of success or what sustainability means to the organization's future, organizational values concerned with success and sustainability are elevated. The poetic principle encourages conversations to occur on *any* topic related to human experience in *any* human system in organizational life, and through this principle, SOAR has been used to study a variety of strategic-related issues (Stavros, 2013).

**Anticipatory principle.** The anticipatory principle observes that human beings naturally anticipate future moments, and that this anticipation has an impact on organizations and people who govern and maintain them. Anticipatory images help to clarify that current behavior and decisions are based on what we think, learn, or imagine may happen in the future. The power of this principle lies in first imagining and reflecting about the future, followed by acting on these visions. When we act from an expectation, we move towards what we anticipate. SOAR allows for an inquiry into the aspirations of its stakeholders to question what the organization is and what it should be. This occurs through reflection of the strengths and opportunities identified to anticipate where we should go in the future and what strategic initiatives will support aspirations.

**Positive principle.** The positive principle describes the causal relationship between positive questions and positive change, i.e., the more positive the questions used to guide a group process or organizational change effort, the more long lasting and effective the change effort (Bushe & Coetzer, 1995). This principle informs the previous four principles of AI and shows that the more positive the image or questions asked, the more positive and long-lasting the results (Cooperrider, 1999)—positive images lead to positive actions. Human beings and organizations move in the direction of inquiry; applying the positive principle to organizational change, widespread inquiry into “sustainable business models” or “building great organizations” will have an entirely different long-term impact for positive action and results than a study into, for example, “worst business models” or “corrupted organizations” conducted with the idea that those conditions can be easily cured. The contribution of AI's positive principle to SOAR is represented in the central tenet that the SOAR framework is intended to be a positive approach to strategic thinking.

The AI principles, rooted in that which is positive and possible, leads to a *new way of thinking, doing, and being*. Conceptualizing the SOAR framework through the principles of AI unleashes imagination and provides a process for people to join together and experience what Peter Senge and colleagues (2005) articulated in the book *Presence*, that the whole is greater than the parts. Like AI, SOAR is concerned with bringing the whole system into the conversation (Amodeo, Cox, Saint, & Stavros, 2008). This means that while *every* individual team member identified in the system may or may not be able to participate, each team should be represented. As a result, organizations begin to understand the interconnectedness of literally every part of the organization, and begin to see the organization as an interconnected whole when making strategic decisions about the future. As with any approach to strategic change, it is best to understand the essential principles that define the strategy and strategic process. Therefore, by understanding the core AI principles that contribute to, and help define the SOAR framework, individuals and stakeholders who use SOAR can now play a key role in strategy assessment, formulation, and implementation to have a positive impact on themselves, their teams, and their organizations.

Additionally, it is important to address the awareness principle, which “supports the broadest and deepest application of the five AI principles,” (Stavros & Torres, 2005, p. 79). These principles were foundational to the development of the elements of SOAR (Stavros & Wooten, 2011) which are displayed in Figure 1 as a symbolic metaphor with an upward spiral to strategic thinking and planning.

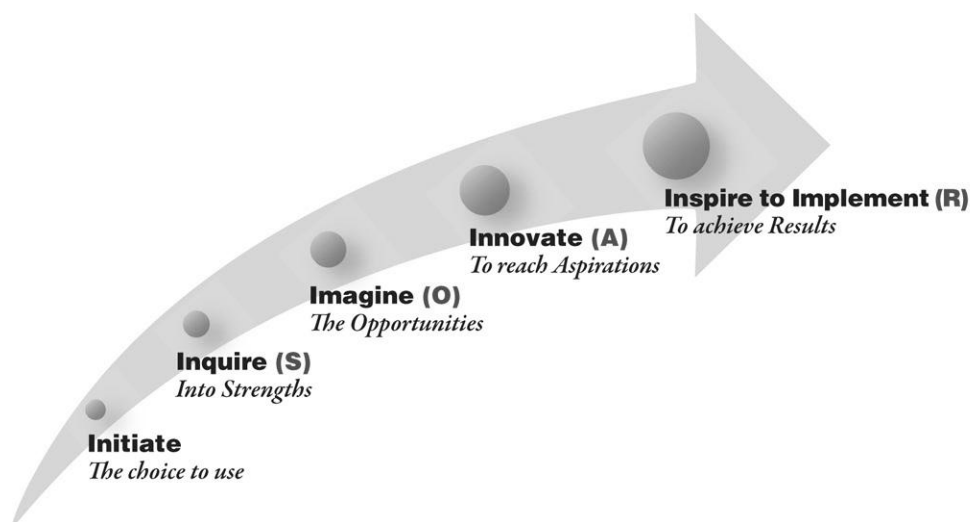


Figure 1. SOAR Elements

Source: Stavros and Hinrichs (2009, p. 29), *The Thin Book of SOAR: Building Strengths-Based Strategy*

According to the SOAR framework, “S” (strengths) offers the foundation for discovering and aligning an organization’s best capabilities to a process of focusing on a stronger competitive advantage and more sustainable future, “O” (opportunities) moves into the realm of location and positive enhancement of potentially unexplored endeavors and innovations, “A” (aspirations) expands and gives voice to the horizons of those focusing on the future of the organization, and “R” (results) reinforces and activates the motivation, resources, and commitment of those involved to attain the desired outcomes. The awareness principle involves understanding the process of reflecting or stepping back, becoming more aware of one’s actions, and incorporating positive energy and aliveness into generative action that spring from the relational activities embedded in the SOAR framework.

The questions remain: How can the constructs of “positive strategy” and “strengths-based strategy” become legitimate? How can the SOAR framework that utilizes these constructs transform and impact an organization’s performance? We answer these questions by (1) explaining the linkage from SWOT to SOAR, (2) describing the processes involved in SOAR-based inquiry, and (3) introducing the SOAR Profile measure of capacity for SOAR-based strategic thinking and planning.



### Linkage from SWOT to SOAR

The traditional approach to strategic thinking involves use of a SWOT analysis which theoretically begins with strengths, but typically dissolves into a discussion over weaknesses and threats. Unlike a traditional SWOT analysis, the contemporary approach to strategic thinking uses the SOAR analysis which theoretically begins with a *strategic inquiry using an appreciative intent*. As such, SOAR features a disciplined approach to helping an organization identify its strengths with an eye on what works best for implementing possible opportunities for growth.

The SOAR framework enhances strategic planning and implementation processes by using a positive guiding approach to *inquire* into strengths, opportunities, aspirations, and measurable results; *imagine* the most preferred future; create *innovative* strategies, plans, systems, designs, and structures to build a sustainable culture; and *inspire* organizational stakeholders to *soar* to a state of engaged high performance and execution of strategy. SOAR is best recognized as a strengths-based framework with a whole system (stakeholder) approach to strategic thinking and planning (see Figure 2).

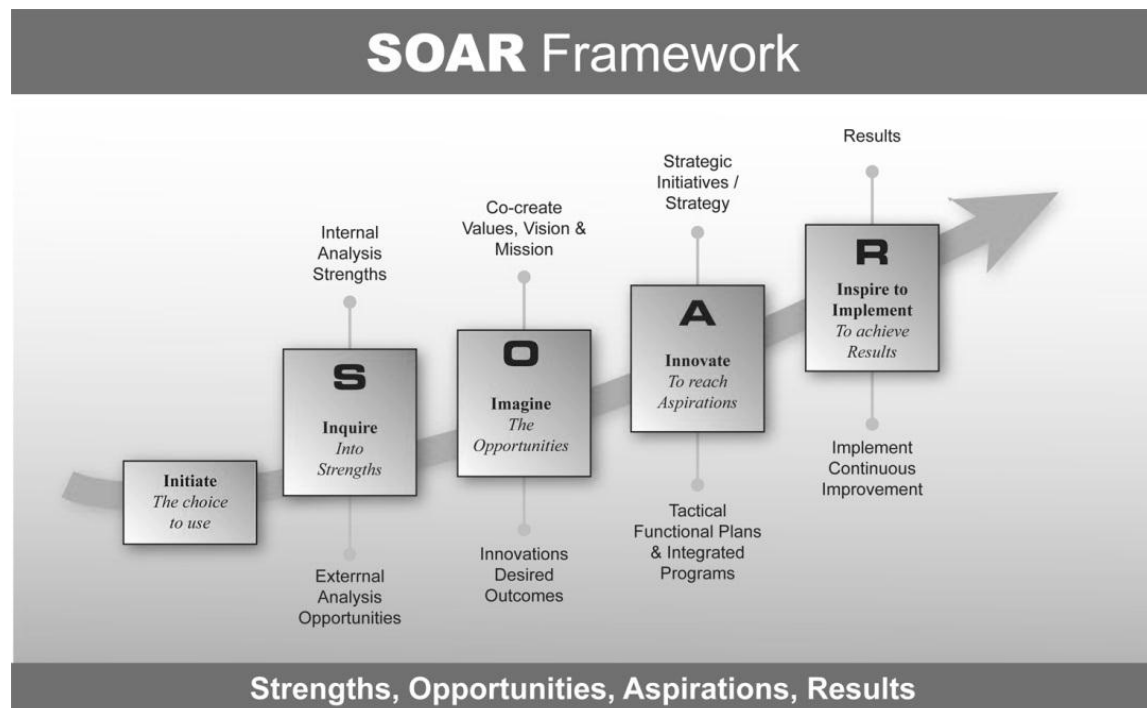


Figure 2. SOAR Framework  
Source: [www.soar-strategy.com](http://www.soar-strategy.com)

### How SOAR Leverages SWOT

The traditional approach to strategic planning processes starts with an analysis based on SWOT (strengths, weaknesses, opportunities, threats) or its reframed counterpart TOWS (threats, opportunities, weaknesses, strengths). SOAR emerged from an interesting question asked by a senior level director 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?” As we have described, the SOAR framework emerged from the core principles of AI; the SOAR framework also leveraged the “SO” of SWOT in its operating platform.

**SWOT analysis.** The SWOT analysis (see Figure 3) has been the *de facto* standard for completing a strategic assessment since the mid-1960s when it was developed from research conducted at Stanford Research Institute. SWOT is an analysis tool for assessing an organization and its internal and external environment. When using SWOT, an organization attempts to understand the static “as is” state of the organization by segmenting strengths and weaknesses and thinking about the potential future organizational state in terms of opportunities and threats.

<b>INTERNAL ENVIRONMENT (S &amp; W)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>• Organization’s resources and capabilities</li> <li>• Basic for developing “competitive advantage”</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• Lack of a resource or capability</li> <li>• A “competitive deficiency”</li> </ul>
<b>EXTERNAL ENVIRONMENT (O &amp; T)</b>	<b>Opportunities</b> <ul style="list-style-type: none"> <li>• Circumstances that support profit and growth</li> <li>• E.g., unfulfilled customer needs, new customers, new technology, favorable legislation</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>• Circumstances that hinder profit and growth</li> <li>• E.g., more competitors, changes to revenue stream, restrictive regulations</li> </ul>

Figure 3. SWOT

**SWOT to TOWS analysis.** SWOT provides equal focus on strengths-opportunities and weaknesses-threats. Wheelen and Hunger (2006) have suggested another way to look at the SWOT framework is the TOWS Matrix (see Figure 4) which focuses an organization’s strengths and opportunities that have the best chance for success (i.e., the S-O Quadrant). It basically is “just another way of saying SWOT” (p. 144). The TOWS matrix can be useful to generate strategies from the SWOT perspective. SWOT and TOWS are very similar yet only two of many possible ways to generate alternative strategies.

<b>Opportunities</b>	<b>Strength</b> <ul style="list-style-type: none"> <li>• <b>S – O Strategies:</b> Good fit between positive aspects of internal and external environments</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• <b>W – O Strategies:</b> Attempt to overcome weaknesses to pursue opportunities</li> </ul>
<b>Threats</b>	<ul style="list-style-type: none"> <li>• <b>S – T Strategies:</b> Build on strengths to reduce vulnerability to threats</li> </ul>	<ul style="list-style-type: none"> <li>• <b>W – T Strategies:</b> Defensive plans to reduce susceptibility to external threats</li> </ul>

Figure 4. TOWS

Source: Adapted from Wheelen and Hunger (2006, p. 144).

**From SWOT/TOWS to SOAR.** Many users of SWOT have experienced that developing a SWOT analysis can be a draining process, as people often get mired in conversations focused on weaknesses and threats. In these situations, the analysis process becomes a descending spiral of negative energy. Furthermore, many strategy textbooks suggest avoiding strategies that place too much emphasis on weaknesses and threats when trying to focus on creating innovations and strategic advantages (Kim & Mauborgne, 2005; Thompson et al., 2014). Thus, in response to a rapidly changing global economy, it is time for traditional strategic thinking and planning processes to change to processes that are more fluid and dynamic. The SOAR framework is just such a strategic thinking process, and by focusing on the ‘S’ and ‘O’ elements of the SWOT/TOWS approaches, SOAR uses the AI paradigm to shift and amplify the energy of the planning process into the S-O quadrant and then subsequently build on stakeholders’ aspirations (‘A’) and desired results (‘R’). Figure 5 illustrates the transformation of SWOT and TOWS into SOAR.

<b>Strategic Inquiry</b>	<ul style="list-style-type: none"> <li>• <b>Strengths</b> What are we doing well? What are our greatest assets?</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Opportunities</b> What are the best possible market opportunities? How do we best partner with others?</li> </ul>
<b>Appreciative Intent</b>	<ul style="list-style-type: none"> <li>• <b>Aspirations</b> To what do we aspire? What is our preferred future?</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Results</b> What are our measurable results? What do we want to be known for?</li> </ul>

Figure 5. SOAR: Strategic Inquiry with Appreciative Intent

Once a SWOT analysis is completed, the next step is to recommend strategic alternatives that would allow the organization to be competitive in its environment. Next, policies are created to link the selected strategy with implementation. Policies and guidelines provide clear guidance to employees for implementing the strategy in terms of programs, budgets, and procedures. Next, evaluation and control mechanisms are put in place to measure activities and performance results. 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 into the strategic thinking and planning process.

An overview of the comparisons and contrasts between the SWOT and SOAR frameworks is presented in Table 1. As shown, SWOT is competition-focused (“just be better”), whereas SOAR is potential-focused (“be the best possible”). Realistically, specific situations will determine which framework to use, and there may even be cases where both SWOT and SOAR would be used for strategic planning. While our intention is not to state that either framework is right or wrong, we propose that SOAR is a considerable improvement as a framework for strategic thinking and planning due to its evolution from SWOT and its use of the AI paradigm.

Table 1. Comparisons and Contrasts between SWOT and SOAR

<b>SWOT</b>	<b>SOAR</b>
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 → Planning	Focus on Planning → Implementation
Energy depleting	Energy creating
Attention to Gaps	Attention to Results

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

### **SOAR Encourages Possibility Thinking in Strategic Conversations**

Rather than addressing weaknesses and threats directly, SOAR asks for weaknesses and threats to be reframed as opportunities for growth. SOAR supports a positive shift of conversations from weaknesses to strengths and from threats to opportunities. SOAR seeks to identify and build on the organization’s strengths and market opportunities as the foundation for strategic growth, thus allowing the organization to approach its future from a position of strengths and opportunities rather than a position that focuses on inherent weaknesses and threats. Weaknesses and threats

are not necessarily ignored in the SOAR framework, but are reframed from a strategic perspective of problems, to a perspective of solutions.

In the broader discussion, a position of “We have weakness that needs to be fixed if we want to move forward” is reframed in the SOAR framework to a position of “This is what we excel at and which can help prepare ourselves for the best future”. Ellen Langer calls this shift “paying attention: looking for what is new and different, and questioning preconceived ideas” (Rurak, 2010, p. B7). Langer calls her approach the “psychology of possibility”, and possibility conversations help to identify what we want to strengthen rather than what we want to avoid.

SOAR framework supports Langer’s concept of strategic *possibility* thinking and conversations. For example, instead of stating a weakness such as “we have a significant problem with customer service center international support,” an organization could reframe this as an opportunity such as “we have an opportunity to create a world class customer service center.” Additionally, deficit-based approaches to problem solving that begin with seeking out problems and weaknesses in a system are reframed by SOAR into an affirmative-based approach that embraces solutions, innovations, and positive success (Cooperrider et al., 2008).

SOAR provides the flexibility to be integrated with other strategic planning and change methods and analytical tools. For example, a key theme addressed in the best-selling book *Blue Ocean Strategy* (Kim & Mauborgne, 2005) is that organizations need to create and capture new markets by focusing on innovating and seeking new market opportunities in a *blue ocean*. “Blue oceans are defined by untapped market space, demand creation, and the opportunity for highly profitable growth” (Kim & Mauborgne, 2005, p.4). Like *Blue Ocean Strategy*, the SOAR framework helps individuals, teams, and organization use strategic thinking and planning to create and grow. Additionally, SOAR does not ignore an organization’s challenges or threats but rather reframes them into possibilities, thus creating a positive approach to the strategic plan.

## Learning to SOAR

### Engaging in SOAR-based Inquiry

The SOAR framework provides a flexible, strategic thinking and dialogue process to complete a strategic assessment, create a strategy and/or strategic plan, and determine appropriate action. The dialogue that ensues from SOAR helps the organization’s stakeholders characterize the organization when it is working at its best and envision what the organization can become. By engaging all of the relevant stakeholders in the dialogue, SOAR creates the possibility for a greater understanding of the whole system to help shape strategy and the strategic process. The following questions and responses exemplify the dialogue process surrounding the SOAR elements of strengths, opportunities, aspirations, and results to help stakeholders make sense of the past and build a promising future to sustain the organizational mission:

Q. What are our strengths? What are our greatest assets?

- Strengths offer the foundation for strategic growth by discovering and aligning an organization's most impactful capabilities (and capacity for effective action) to focus on performance drivers and the best potential future. Strategic conversations are held to identify how strengths can be leveraged to obtain desired results.

Q. What are the opportunities? What potential do we see or recognize?

- Opportunities move into the realm of locating possibilities (or combinations of possibilities) and positively enhancing unexplored endeavors (or innovations). Strategic conversations focus on opportunities to innovate new products, new services and new processes, and focus on making sense of opportunities that will meet the needs of existing and new customers.

Q. What are our stakeholders asking for? What should our future look like?

- Aspirations expand and give voice to those who focus on stakeholders' desires. Conversations focus on strategic initiatives that will serve stakeholders' aspirations—especially aspirations of existing and potential customers.

Q. How do we know we are succeeding? What are the rewards and resources required to achieve the results?

- Results are designed to reinforce and activate the motivation and commitment of those stakeholders involved in attaining desired outcomes. To maximize results, the organization must identify the resources needed and rewards to motivate.

These SOAR questions and responses identify and/or build on strengths (i.e., the strategic core); discover profitable opportunities; imagine a compelling future; set goals and strategic alternatives; create enabling objectives; design strategies and tactics that are integrated with their most successful programs and supply chain partners; create new processes and systems; define performance drivers and metrics aligned with goals and objectives; and implement a strategic plan that is a dynamic, continuous, and a living document.

SOAR involves designing and conducting inclusive conversations that result in action. These conversations occur through two approaches: The SOAR 5-I Approach and Quick SOAR. The SOAR 5-I Approach involves the phases Initiate, Inquire, Imagine, Innovate, and Implement (see Figures 1 and 2; Stavros, Cooperrider, & Kelley 2006; Stavros & Saint, 2010). The Quick SOAR approach involves creating strategies for action rather than formal strategic plans (Stavros & Hinrichs, 2009). We first describe the SOAR 5-I Approach, and then we describe the Quick SOAR.

### **SOAR 5-I Approach**

SOAR helps the strategic assessment process to take on a life of its own, starting with an inquiry to discover how the organization has succeeded in the past and how the organization is succeeding in the present. The strategic process helps to build a

sustainable competitive advantage for the future by identifying the organization's unique value offering (UVO). This phenomenon occurs through an on-going conversation with the identified stakeholders of the organization. Through this dialogue, appreciative ways of knowing and learning about an organization's history and core capabilities are enriched. Srivastva and Cooperrider (1990) explained it as follows:

Organizations are, to a much larger extent than normally assumed, affirmative systems—they are guided in their actions by anticipatory “forestructures” of positive knowledge that, like a movie projected on a screen, project a horizon of confident expectation which energizes, intensifies, and provokes action in the present. The forestructures or guiding images of the future are not the property of individuals but cohere within patterns of relatedness in the form of dialogue. (p.14)

Not only does SOAR elicit conversations created from unconditionally positive questions, it also engages the 5-I Approach: Initiate, Inquire, Imagine, Innovate, and Implement. The 5-I Approach is an alternative to the traditional appreciative inquiry elements of Discovery, Dream, Design, and Destiny that comprise the AI 4-D Cycle. The five phases of the 5-I Approach can be thought of as steps, where each step involves cycles of SOAR thinking and conversations. These five phases are briefly defined as follows:

1. **Initiate** – The organization's leadership holds strategic conversation and formulation on how to apply SOAR and integrate it with existing strategic planning methods, processes, and applications. They also identify the relevant stakeholders and ways to bring those stakeholders into the process. The core strategic planning team is created and a conversation on the language of strategy may take place to make sure there is shared meaning and understanding of strategy and the type of strategic plan to be created.
2. **Inquire** – This is a strategic inquiry into the organization's values, mission, internal strengths, external environment to create opportunities, and conversations of aspirations and results. Both the “as is” current state of the organization and “might be” future possibilities of the organization are explored.
3. **Imagine** – A creative dialogue takes place that considers the influence of strengths, opportunities, and aspirations to create a shared vision of the organization. Participants involved with the organization use the power of positive images of the future as a basis for positive actions and results—it is these images and supporting dialogue that create the inspiration and excitement to fuel strategic plans.
4. **Innovate** – Strategy is designed to create the “how and what” of the best pathway forward. Strategic initiatives are identified and prioritized to enact changes to existing processes, systems, structures, and culture as discussed in the Imagine phase. These changes take advantage of the strengths, opportunities, and aspirations to achieve the results.

5. **Implement** – Energy, commitment, and tactical plans emerge to implement the strategy that achieves the desired results. Results are used as feedback measures for iterations and course corrections. Implementation involves many people with different skills and competencies aligned and working on linked projects.

The impact of the 5-I approach centers on the dialogues that occur when individuals involved in strategic thinking and planning ask SOAR-based questions. The SOAR dialogue positively transforms the way people in the organization think and work together to get things done. As shown in Figures 1 and 2, there is an upward spiral of positive momentum while stakeholders are creating a shared set of values, vision, and mission statement identifying strengths and opportunities to create strategic initiatives, strategies, and plans that achieve desired results.

There are hundreds of case studies on the applications and benefits of applying SOAR. The *AI Practitioner: International Journal of Appreciative Inquiry* featured two issues in 2003 and 2007 devoted to SOAR, as well as a featured article with three case studies in the 2013 issue (Stavros, 2013; Stavros, Cooperrider, & Kelley, 2003; Stavros & Hinrichs, 2007; Stavros & Sutherland, 2003). There are also SOAR case studies in several books (e.g., Stavros & Hinrichs, 2009; Stavros & Sprangel, 2008; Stavros & Wooten, 2011; Wankel & Stoner, 2009; Watkins, Mohr, & Kelly, 2011). Table 2 provides a summary of the types of organizations that have been impacted by SOAR, and the global impact of SOAR since 1999.

Table 2. 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

Source: Stavros (2013, p. 14).

### Quick SOAR

In recent years, many users of SOAR have applied the framework to create strategies for action rather than formal strategic plans. This use of SOAR has been coined a “Quick SOAR” (Stavros & Hinrichs, 2009). Quick SOAR typically involves a half-day or full-day strategic dialogue where the S, O, A, and R elements of SOAR are used to create a strategy for change around an issue or challenge stakeholders are seeking a strategic solution. For example, a director of a non-profit youth leadership development program needed to create a quick strategy to obtain funding in a short-time period to send a group of youth leaders to the President’s Inauguration in Washington, DC. The director and a committee of stakeholders met for a half-day and used the SOAR questions to create a strategic dialogue that resulted in a proposal to request funding. In less than three months, the proposal was approved, funded, and implemented to send youth leaders to Washington, DC. The director said that Quick SOAR allowed them to focus on what the youth leadership program could build on to help current and future youth leaders, and



how the impact of the inauguration could create inspirational possibilities for the youth leaders. This demonstrates that the scalability of SOAR allows for rapid applications to create solutions for any number of desired opportunities.

The SOAR 5-I Approach and the Quick SOAR operationalize the SOAR framework to help stakeholders construct a shared value set, vision, and mission which result in collective action to innovate and develop strategic initiatives, strategies, plans, structures, systems, processes, and culture. A key distinction of either the SOAR 5-I or the Quick SOAR approach to create strategic plans or strategies is their focus on *identifying* and building on existing strengths and *imagining* opportunities rather than dwelling on problems, deficiencies, weaknesses, and threats. Through either of these two approaches, there is a collaborative process of open dialogue (i.e. strategic conversations) which helps an organization and its partners anticipate what will happen when their organization is working at its best to discover dynamic capabilities to best serve customers. This information can then be used to create an image of “the best of what can be” for the future of the organization. Thus, SOAR’s power is its potential to co-create a visual image of the organization’s future.

In the next section, we explore the value and nature of research on SOAR and how it influences strategic thinking from a strengths-based perspective through a new instrument called the *SOAR Profile*. The SOAR Profile is a self-report, rapid assessment instrument developed from the theory and practices of SOAR. We designed the SOAR Profile to help individuals learn about and understand their natural strategic thinking capacity to engage in SOAR-based strategic thinking and planning that positively impacts individuals, teams, and organizational performance.

### Introducing the SOAR Profile

Developed from over ten years of research on the SOAR framework, the SOAR Profile is an assessment instrument that will help an individual understand and learn about their strategic thinking capacity in order to improve self, team, and organizational performance (Cole & Stavros, 2013). The purpose of the SOAR Profile is to measure an individual’s natural capacity for strategic thinking about four elements that are essential for the dynamic, future-oriented strategy of the 21st century: Strengths, Opportunities, Aspirations, and Results.

**Description.** The SOAR Profile measures an individual’s strategic thinking capacity on all four elements of the SOAR framework. This contrasts with the existing measures of strategy and strategic thinking, as well as the existing measures of strengths. Specifically, existing measures of strategic thinking have been designed to assess the *application* and *utilization* of strategic thinking and SOAR, whereas existing measures of strengths have been designed to measure the top one or two strengths. In this regard, measures such as Clifton’s and Rath’s StrengthsFinder (Gallup Poll) and Buckingham’s StandOut assess behavioral themes that combine to create a certain “personality” for the respondent, i.e., a certain way of engaging with the world. The outcome of these measures of strengths is that a respondent is defined according to various personality roles or *strength roles*, such as “Advisor”, “Connector”, “Creator”, etc. The SOAR Profile differs from these measures of strengths by assessing the level of each of the

SOAR elements to produce an index of the respondent's natural strategic thinking capacity according to the SOAR framework. Nevertheless, the SOAR Profile extends and elevates their work.

The SOAR Profile is an assessment tool that understands the "noise" of the mind in processing words and thoughts (e.g., problems with attention and disruptions to focus), and appreciates the power and complexity of language processing. Assessment tools such as the StrengthsFinder present self-descriptors, such as "Are you a teacher or are you a coach?", and one of the two choices is selected. While the StrengthsFinder has the benefit of rapid completion, it has the downside that the self-descriptors are spelled out and require careful analysis and thought about the response choice. In contrast, the SOAR Profile has the benefits of simplicity, low cognitive demand, avoidance of parsing of phrases, and rapid assessment of the full SOAR framework.

Individuals who complete the SOAR Profile are presented with one-word descriptors of strategy and strategic thinking according to the SOAR framework. As a quantitative measure of strategic thinking capacity, the SOAR Profile asks respondents to rate their potential for cognitive processing of each descriptor (i.e., capacity for thinking) on a scale of 1-5, Never to Always. Each one-word descriptor comprises an item, and items are randomized across the four SOAR elements. Each of the SOAR elements, or in statistical parlance, "factors," is created from a set of five items that are combined to measure an individual's capacity to think strategically about the factor. Each independent strategic thinking capacity is further combined to define an individual's overall, composite SOAR-based capacity for strategic thinking. It should be noted that the primary concern with the SOAR Profile is in measuring an individual's capacity to think strategically according to the SOAR framework, rather than measuring if an individual does, in fact, think strategically. Then, based on this assessment, an individual's capacity to think strategically from a whole system strengths-based perspective can be learned and nurtured over time.

In summary, the SOAR Profile is an efficient measure of individual strategic thinking capacity in terms of strengths, opportunities, aspirations, and results. Information obtained from the SOAR Profile will help create a strengths-based future for the individual, their team, and their organization.

### **Summary**

In order for an organization to *positively transform and change*, it must take advantage of opportunities, leverage internal strengths, and optimize its human capital for building a sustainable organization. A sustainable organization is one that takes care of its people and does no harm to the planet while making a profit. Two global strategists, Gary Hamel and C.K. Prahalad (1994), have shown in their research 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. In the current paper, we have discussed how SOAR and the SOAR Profile increase the capacity of individuals, teams, and organizations to support a sustainable organization.

According to Walsh (1999), research in the business and management literature has been preoccupied with deficit-focused traditional approaches in which problem solving is the primary intent of strategy. In the field of strategy, there is a great deal of research on the application of the traditional SWOT model for strategic analysis. To address this imbalance, the Center for Positive Organizational Scholarship ([www.centerforpos.org](http://www.centerforpos.org)) has been on a mission to promote positive-states of organizing as alternative approaches in which solution-generation is the intent of strategy. Research from the POS Center focuses on the *positive* aspects of strategy and strategic thinking and planning, focuses on conceptual development of POS and its definitions, and suggests approaches for organizational success that utilize POS (Cameron & Caza, 2004; Caza & Caza, 2008; Roberts, 2006).

The current article extends the shift in focus promoted by the POS Center and is the first article to focus on the conceptual development of the SOAR framework and its application to create positive transformation and change. Furthermore, the article introduces the SOAR Profile, which is a new measure of strategic thinking capacity based on the SOAR framework.

In summarizing key implications of the article, we present the following observations:

1. All members of a team and organization should engage in strategic thinking, and the SOAR framework will help provide a fresh and innovative approach to traditional strategy conversations and strategic planning efforts to encourage positive strategies, actions, and results.
2. The SOAR framework helps individuals to complete a strategic inquiry with an appreciative intent regarding strength-based practices, best possible market or product/service opportunities to be considered, collective aspirations and dreams of stakeholders, and measurable and meaningful results. The SOAR framework asks us to consider how the whole system can get involved in the strategic thinking process, what the required resources and rewards are to successfully implement strategy, and that SOAR accelerates the strategic planning efforts that give life and energy to the organization's members and their future.
3. In response to suggestions by Hutzschenreuter and Kleindienst (2006) that strategy research focus on *what type* of strategies can be created, focus on *how* an organization can best determine its strategies, and "... design a strategy process in a way that people are willing to devote their full potential to the process" (p. 710), the SOAR framework guides both strategic thinking and strategic planning from a strengths-based approach to create positive strategy.
4. To help put users of SOAR and the SOAR Profile in touch with other users, we are discussing plans to create a forum for SOAR-based research that will share and document best practices and provide support for scholars and practitioners interested in SOAR.

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