**SOAR to New Heights**

Your marketing team will unleash their potential and SOAR like eagles using this motivational strategic planning framework.

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| Type | Meeting |
| Purpose | Planning and strategy |
| Topics | Goal alignment, prioritization, decision-making, brainstorming, consensus building, strategic planning, collaboration, marketing |
| Audience | Marketers |

## **About this activity**

In this session designed for marketers, participants will channel their inner eagles by using the SOAR strategic planning framework combined with a fun, hands-on exercise related to user personas to take the company’s marketing efforts to a new height!

The SOAR strategy is rooted in appreciative inquiry and leverages what the organization does well to create new opportunities. According to a study published in the Journal of Applied Behavioral Science, organizations that used Appreciative Inquiry experienced an average of 35% increase in profitability within two years of implementation.

The SOAR framework answers the following questions:

S - Strengths “What are our greatest strengths?”

O - Opportunities “What are our best opportunities?”

A - Aspirations “What sort of an organization do we aspire to be?”

R - Results “How will we know when we get there?”

In this activity, participants will walk through the SOAR framework pertaining to competitive/market analysis, products/services, placement/pricing, and promotion/brand messaging. Participants will prioritize their top actionable initiatives for the next year that will be used to develop the strategic marketing plan.

This activity is designed for marketers and works best with up to 75 participants in an in-person setting.

#### Important details

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| Best for groups of | Up to 75 total participants |
| Preparation time | 15-20 minutes |
| Duration | 2 - 2.5 hours |
| Required materials | * Flip chart * Markers * Pen/pencil * Post-It Notes * User Persona Template * Timer * Removable tape |
| Required location | * Indoors * Blank wall for posting user personas and flip chart pages |
| Noise level | Medium |

## **How it works**

#### Instructions

Before conducting the activity (15 - 20 minutes):

The facilitator should send the following message and User Persona template to each participant:

“In preparation for our strategic planning session, you will think of a famous person from pop culture that fits your target customer profile for one of your products or services. The person you select can be an actor, musician, book character, superhero, sports figure, etc. Using the provided template, you will create a user persona for this person, bring it to the workshop session, and share it with the team. Can’t wait to see your brand’s new ideal customer!”

The facilitator should prepare the room by placing a stack of Post-it Note pads, markers for writing on flip charts, and a roll of removable tape at each table.

If desired, the facilitator may create a motivational playlist for use during breaks with songs that keep with the theme. Suggestions include:

* Fly Like an Eagle by Steve Miller Band
* Wind Beneath My Wings by Bette Midler

The facilitator should read the instructions and familiarize themselves with the SOAR exercise.

Conducting the activity:

Introduction (10 minutes):

The facilitator should open the session with the following quote by poet Carl Sandburg: “There is an eagle in me that wants to soar, and there is a hippopotamus in me that wants to wallow in the mud.”

The facilitator should add that during the planning session, participants will embrace their inner eagles and collaborate to create initiatives that will help the company’s marketing and brand SOAR to new heights in the coming year. To do this, the session will be broken down into mini-workshops on four focus areas: competitive/market analysis, products/services, placement/pricing, and promotion/brand messaging.

The facilitator will inform participants that in each mini-workshop, participants will collaborate using the SOAR framework to capture strategic ideas:

S - Strengths “What are our greatest strengths?”

O - Opportunities “What are our best opportunities?”

A - Aspirations “What sort of an organization do we aspire to be?”

R - Results “How will we know when we get there?”

Icebreaker Exercise (10 - 15 minutes):

The facilitator will instruct participants to hang the user personas they brought with them on the wall in the session room using the removable tape and to take a few minutes and read the other personas. As they read, participants should be instructed to pay attention to how the personas relate to the company’s brand.

The facilitator will then lead the group in a short discussion of their observations:

* Which users most closely fit our brand?
* What are some things the users have in common?
* What are some differences between the users?
* Can those differences be incorporated into our unique value proposition?

Mini-Workshop #1 Competitive/Market Analysis (15 - 20 minutes):

The facilitator will walk participants through the SOAR framework while focusing on the topic of competitive and market trends. The facilitator will start with strengths and use the questions to prompt participant responses, which are then written on the flip chart page and posted on the wall. The facilitator should keep going until there are 15-20 items or until there is a lag between responses, generally 4-5 minutes.

The process should then be repeated for opportunities, aspirations, and results.

S - Strengths “What are our greatest strengths?”

* What is our unique selling proposition?
* What do we do better than anyone else?
* What do our customers see as our strengths?
* What do we do differently than our competitors?

O - Opportunities “What are our best opportunities?”

* What new market trends can use to our advantage?
* What new customers are available to us?
* What competitive advantages can we push farther?

A - Aspirations “What sort of an organization do we aspire to be?”

* What do we care deeply about?
* What do our customers care deeply about?
* What would we do if we were not limited by time or resources?

R - Results “How will we know when we get there?”

* What results will we be known to our customers?
* What will look different in how we market our brand/products/services?

Mini-Workshop #2 Products/Services (15-20 minutes):

The facilitator will walk participants through the SOAR framework while focusing on the topic of products and services.

Activity/Voting/Break (15 minutes):

The facilitator will instruct participants to take a 15-minute break. During this time, participants may use the restroom or get a drink or snack and complete the following two tasks:

1. Select one of the user personas on the wall to come up with a new product or service related to the company’s business that the celebrity will endorse. The participant should write their idea on a post-it note, then hang it under the user’s persona.
2. Use a marker to put a tally mark beside their top 3 choices in each category - strengths, opportunities, aspirations, and results - for competitive/market analysis and products/services,

When wrapping up the break, the facilitator should call out a few of the most creative, innovative, or humorous product and service ideas.

Mini-Workshop #3 Placement/Pricing (15-20 minutes):

The facilitator will walk participants through the SOAR framework while focusing on the topic of product/service placement and pricing.

Mini-Workshop #4 Promotion/Brand Messaging (15-20 minutes):

The facilitator will walk participants through the SOAR framework while focusing on the topic of promotion and brand messaging.

Activity/Voting (10 minutes):

The facilitator will instruct participants to take a 10-minute break to complete the following two tasks:

1. Select the same or a different user persona on the wall and come up with a tagline they would use to endorse one of the suggested new products or services. The participant should write their tagline on a post-it note, then hang it under the user’s persona.
2. Use a marker to put a tally mark beside their top 3 choices in each category - strengths, opportunities, aspirations, and results - for placement/pricing and promotion/messaging.

When wrapping up the break, the facilitator should call out a few of the most creative, innovative, or humorous tagline ideas.

Recap of Identified Priorities (15 minutes):

The facilitator should review the tally marks and circle the top three most identified items in each category and topic and repeat back the findings to the group. The facilitator should take the last ten minutes to ask the following questions:

1. Do these items resonate as our top priorities and areas of focus for the coming year?
2. Are there any significant priorities that are not included? The facilitator should write suggestions on a new flip chart page.

The facilitator should conclude the session by thanking participants for their participation and ideas that will become part of the company’s strategic marketing plan.

The facilitator should gather the completed flip chart sheets and the user personas with the post-it notes attached for follow-up.

#### Rules

All input is welcome in the brainstorming stages. Ideas will be evaluated by consensus as the activity progresses.

#### Example

Not applicable

## **Materials**

#### For facilitator

Flip chart

Markers

Timer

Removable tape

#### For attendee

Pen/pencil

User Persona template

Post-it notes

Markers

Removable tape