

SOAR Program Overview

Success through Observer – Action – Results

Success for leaders and organizations today depends less on what we can accomplish on our own and more on the quality of Results we can produce by working with and through others. Our ability to produce “breakthrough Results” is virtually always related to our capacity to dramatically improve collaborative action, at a variety of levels and in a variety of ways.

Many of us, especially in STEM-oriented (science, technology, engineering, and math) organizations, learn functional and technical skills in school, college and traditional training programs. But we often don’t learn business-appropriate relationship-building skills, or how to create mutually-beneficially emotional connections with colleagues, or how to have the purposeful, effective (and sometimes difficult) conversations that actually drive the organization’s most important Results.

Most of us – if we do acquire these competencies at all – do so the hard way, through our life experiences. And for increasing numbers of organizations in a wide variety of industries, the ability to initiate and build strong relationships and have effective conversations are the foundation upon which extraordinary Results are achieved.

The SOAR program, based on key principles within Chalmers Brothers’ book *Language and the Pursuit of Happiness* and his forthcoming book *Language and the Pursuit of Leadership Excellence*, is about acquiring and practicing these skills and competencies. SOAR is an acronym for Success through Observer – Action – Results. It provides a new foundation and new set of tools for dramatically improving leadership effectiveness, professional and personal productivity, relationships, “emotional intelligence” and our ability to actually achieve desired Results – in a wide variety of areas.

Learning Objectives / Expected Impact:

SOAR is a cutting-edge, cohort-based leadership and employee development program that transforms how leaders and employees at all levels observe and understand, take action and produce Results.

Typically delivered over a period of 6-9 months, SOAR is designed with the following objectives in mind:

1. Support participants in their professional and personal growth.

2. Strengthen participants' conversational, relational and emotional competencies for the purpose of:
 - Improving leadership effectiveness
 - Strengthening corporate culture
 - Increasing productivity, effectiveness and profitability
 - Building and sustaining mutually-beneficial, productive relationships
 - Improving teamwork and communication
 - Strengthening organizational capacity to learn from mistakes, adapt and innovate
 - Reducing stress and "overwhelm"
 - Improving emotional well-being and balance

3. Introduce a new set of perspectives, distinctions, and tools that can be employed at work and at home... even long after the program is over.

Program Features

SOAR is typically delivered as a series of half-day (4 hour) sessions or modules, each session being approximately 4-5 weeks apart. The SOAR program may include as few as 3 or as many as 8 modules, depending a number of factors. The key frameworks and tools within SOAR can be customized and integrated into already-existing programs in a variety of ways, as there isn't simply "one and only one" way to move through these topics.

Accountability Groups: SOAR participants are placed into 3-person Accountability Groups during the first session of the program. These groups remain together throughout the program, providing a structure for improved accountability, as well as a forum (inside and outside of the sessions) for reflection and discussion of key topics, concepts and practices. The groups provide a structure for completing "homework" (including selected readings from *Language and the Pursuit of Happiness* and/or *Language and the Pursuit of Leadership Excellence*) and enabling participants to learn with and from each other.

Individual Self-Assessments: During the first session, participants conduct a self-assessment of current levels of 1) Competency and 2) Satisfaction within key domains of leadership effectiveness, as well within (optional) key domains of our personal lives.

Individual Goal-Setting: The outcome of these self-assessments and the accompanying Accountability Group conversations during Module 1 are used as the basis for each person establishing one professional (required) and one personal (optional) goal. These goals are part of the context for each person's participation in the program, and discussion of status toward achievement of these goals is a regular element of Accountability Group conversations that occur throughout the duration of the course. The individual goals may be refined or updated throughout the Program, as they are also reviewed and considered alongside Team issues, concerns and priorities that may surface via the Team Assessment / Diagnostic.

Half-Day Modules: The content of SOAR is delivered through a series of half-day (typically 4 hour) workshops. The sessions are interactive and experiential in-terms of design, to support adult learning. The modules are spaced 4-5 weeks apart and involve homework to be conducted between sessions. Homework includes selected reading, as well as reflection, self-observation, new practices and structured conversations with Accountability Partners. Time is allotted during every session for Accountability Groups to discuss status and progress toward all goals, to work together in understanding how to best apply new learning, and to refine goals and action plans as needed. In this way, the SOAR Program maintains an ongoing “rhythm” of inward-focus / reflection and outward-focus / application.

Learning and Application Over Time: SOAR operates with the understanding that learning “about” is not the same as learning “to do.” This program provides for a deeper learning and more sustainable embodiment through practice, feedback and reflection – over time. It provides time for reflective learning, group conversations, and ongoing application and practice.

Executive Coaching (Optional): As the program unfolds, facilitators (typically credentialed / experienced coaches, consultants or trainers) will be available for individual executive coaching for selected participants.

Sample SOAR Module Descriptions (8-Module Program)

The topics below do not represent “the” way of moving through the material within SOAR, but simply one approach. There are many effective ways of integrating and moving through the powerful frameworks, principles, distinctions and tools within this program. As part of the SOAR community, you will have access to a vibrant, engaged community of practitioners, sharing and learning with and through one another.

- **PRE-WORK: Self-Assessment, Initial Goal-Setting, Creation of Accountability Groups.** Prior to the first session, the 3-person Accountability Groups are created and members begin strengthening existing relationships and building new ones. Twelve Permanent Domains of Life are introduced, and participants conduct a self-assessment of current levels of Competency and Satisfaction within each domain. The outcome of this assessment and the accompanying Accountability Group conversations are used as the basis for each person establishing at least one Goal. These Goals, which may be refined or updated throughout the Program, will be a key focus moving forward of each participant and the Accountability Group to which he or she belongs.
- **Module 1: Goal Review and Paradigm Shift – A New Way of Understanding Language and Conversations.** The module begins with participants sharing, reviewing and refining their Goals. Next, the foundation of the Program – a generative and creative interpretation of language – is introduced. Participants engage in activities that demonstrate many of the ways in which our language opens and closes possibilities, moves us in Action and brings about tangible Results in the world (as opposed to being merely a “tool for communication”). Four new claims about language are covered and discussed, as are the implications and potential impact related to Goals and desired areas for improvement. A framework for examining the impact of missing, required and prohibited conversations is also introduced and discussed in the context of participant Goals and workplace business issues.

- **Module 2: Learning to Learn.** This module focuses on the ongoing presence of change in our professional and personal lives and the phenomenon of learning – regardless of subject matter. Participants strengthen their understanding of ways in which we can actively support – as well as inadvertently sabotage – our ability to continue learning and growing throughout our lives. First-order and second-order learning are introduced, as is the strong connection our emotional states have on our capacity to learn. Additionally, the importance of our physical bodies and our willingness to “put our bodies into” new learning is discussed. Participants share best practices from experiences in which they have most successfully learned, as well as situations in which learning was more difficult and less successful. Becoming a better observer of the ways our internal and external conversations impact the process of learning is a central theme woven throughout the module.
- **Module 3: Listening, Hearing, Beliefs and Results.** The difference between listening and hearing is explored here, as are the ways in which operating with this distinction can be of benefit to us. Different “modes” of listening are covered, as is a new Communications Model better suited for human beings than is the traditional “transmitter-receiver” model often employed. This module also includes a focus on our beliefs, and the ways in which they impact our behaviors, our interactions, our emotional states and our Results in a wide variety of areas (whether we’re aware of this or not). Attention is paid to surfacing historical beliefs that may be getting in the way of desired future Results. And participants explore ways in which these older beliefs may be transcended or updated in favor of new, more powerful ones. The connection between beliefs and Results is a central theme here, as is the claim that we are each the authors of our own lives – and as such, we have the authority to update the beliefs that create the context out of which we live.
- **Module 4: Understanding Ourselves and How We Actually Produce Results.** This module addresses the “Grand Illusion” – that is, the belief that everyone sees things like we do. Here, each of us is seen as a Unique Observer, one that includes the separate but highly

inter-dependent aspects of Language, Moods/Emotions and Physical Body. Participants explore these connections and their own particular combination or congruency that they've established, so far, in their lives. They also explore ways in which this way of being may be shifted and the impact such a shift may have on new Actions and new Results. The Observer-Action-Results model is introduced as a way to more clearly understand the ways we actually bring about new Results – including achievement of new Goals – in our lives. It also highlights clearly the way in which we “see things” impacts the Actions we even see as possible in the first place, and opens the door to a type of learning that goes far deeper than simply looking for new alternatives. Lastly, a new type of conversation for leveraging the power of groups is introduced and practiced: Conversation for Processing Decisions, Opportunities and Challenges.

- **Module 5: Assertions, Assessments and Declarations.** Moving away from listening and into the fundamental Speech Acts, this module introduces the critical distinction between Assertions (facts) and Assessments (opinions) and Declarations. Although most of us already have a broad understanding of these distinctions, this module goes deeper and uncovers the ways in which our use of Assertions, Assessments and Declarations impacts our personal well-being, our public identity, our ability to set and achieve Goals, our ability to learn, and the nature and quality of our most important relationships. Participants are involved in activities which bring to life the ways in which they may have historically “blended” or “blurred” Assertions and Assessments in the past, and to discuss the consequences of having done so. Nine key Declarations are also covered, as well as the importance of understanding the connection between boundaries of authority and different types of Declarations. Everything from the office or department Goals to individual standards to the often unspoken beliefs about ourselves are included in this module, as they are all different types of declarations. Workplace performance management is discussed, as are ways these tools may be used to improve these processes. Participants are given opportunities to practice making and sharing “grounded” assessments – those made on the basis of conscious standards and supporting facts (Assertions).

- **Module 6: Requests, Offers and Promises.** These key Speech Acts are the basis for how we do virtually everything we do with others, and as such are critically important to understand and use effectively. Fundamental leadership conversations and “Conversational ROI” are introduced here via Conversations for Relationship, Conversations for Orientation (culture) and Conversations for Implementation (execution). Participants learn to see their organization as a “network of commitments,” and in doing so, open up entirely new avenues for intervening effectively. Effective requests are viewed as the front end to these commitments, and participants work in groups to practice making requests and identifying ways to improve them. The ways people are allowed to respond to requests are also included, as these represent the back end of the commitment. Participants also work to identify steps required to create a culture of commitment or a culture of accountability within their sphere of influence. Accountability and productivity – at work and everywhere – are central themes of this module, as is the relationship between how we coordinate action and the type of culture or environment we create.
- **Module 7: Emotional Intelligence and Trust.** While the topic of moods and emotions has been present in several earlier modules, it is the central focus here. Participants learn key distinctions that distinguish moods from emotions, as well as ways in which they can much more purposefully design and influence their own moodspaces. Four Basic Moods are introduced through an activity in which participants reflect upon and share their experiences within each of these major moods, as well as steps to take to move out of certain moods and into others. A new way of understanding, building and re-building Trust is also included, as levels of trust have enormous impacts on our individual well-being, our relationships and our ability to lead and work effectively with others. Trust, moods and emotions are obviously central to our ability to establish a balance of peacefulness and productivity in our lives, so it is critical that we improve our ability to 1) become a better observer and 2) take healthy steps to purposefully build trust and positively influence our own emotional patterns. This module provides tools and practices to support participants in exactly these areas.

- **Module 8: Putting It All Together and Moving Forward.** This capstone module brings the Program to a close, and a large portion of the session is actually facilitated by the participants themselves. Accountability Groups present reviews of “key learning” from major topics from earlier modules, and lead conversations in which Goals and progress are shared. Additional topics include the relationships among being, doing and having... and how to best apply this learning in order to positively shift our way of being. Participants also practice ways to use this body of learning to spend more time “in the present,” which is where we always are anyway and is the only place from which we can actually take Action. This module is a time for celebration and acknowledgement, as well as for reflecting and having conversations around four fundamental questions: What Have I Learned? What Matters? What’s Missing? What’s Next?