

<Insert Organization / Department Name>

## SWOT Analysis

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### Step 1: Engage Participants

Share any relevant background information with the individuals who will be participating in the actual SWOT Analysis. Give participants time to absorb the the information and prepare their own draft SWOT Matrix.

Provide participants with a draft SWOT Matrix with adequate space to report what they believe are the organizations Strengths, Weaknesses, Opportunities and Threats.

This information may be shared by conducting group discussions, distributing it by email or via an online survey.

### Step 2: SWOT Matrix

The end product of SWOT Analysis is a SWOT Matrix (see Appendix A). This is a tool to record the **Strengths, Weaknesses, Opportunities and Threats** relevant to your organization. Strengths and weaknesses are generally considered to be 'internal' to your organization, while opportunities and threats are generally considered 'external' factors.

#### 5 Simple Rules for a Successful SWOT Analysis

1. Be realistic and subjective about the strengths and weaknesses of your organization when conducting SWOT Analysis.
2. A SWOT Analysis should distinguish between the current and the future status of your organization.
3. SWOT Analysis should always be specific. Remain focused on the topic and keep points 'black and white'.
4. Apply SWOT Analysis relative to your competition. It is important to identify who you are competing against and what you do better and what you do worse.
5. Keep your SWOT Analysis short and simple. Avoid complexity and over-analysis.

## Step 2: Conduct a SWOT Analysis Meeting

The next step in the SWOT Analysis process is to assemble a team to complete the process. The SWOT Analysis meeting should adhere to the following format:

### Explanation of the Process

It is important that the participants understand why they are at the meeting and what the expected outcomes of the meeting are.

- Explain that the purpose of the meeting is to conduct a SWOT Analysis for the organization / department. Define SWOT Analysis as *the process of documenting the organization's Strengths, Weaknesses, Opportunities and Threats*.
- Explain how your organization will use the results of the meeting. The outcomes are important because the information will serve as a foundation for planning.
- Establish meeting ground rules and how the meeting will be conducted.

### Identify Strengths

Develop a list of all of the internal strengths of the organization. Incorporate feedback from the team members, emails and surveys. Discuss the listed strengths and clarify any questions.

### Identify Weaknesses

Repeat the process you used to identify strengths to generate a list of the organization's weaknesses. Weaknesses are internal factors that may impact the organization negatively. Note: It is possible that a strength could also be a weakness. For example, long term employees could be a strength because of their experience, but may be a weakness because it indicates a workforce close to retirement.

### Identify Opportunities

Develop a list of all of the opportunities. Opportunities are external factors. Incorporate feedback from the team members, emails and surveys. Discuss the listed opportunities and clarify any questions

### Identify Threats

Repeat the process you used to identify opportunities to generate a list of the organization's threats. Threats are also external factors. Threats could potentially have a negative impact on your organization.

Note: It is possible that an opportunity may also be perceived as a threat. For example, new technology tools might be an opportunity, but also threaten employee satisfaction.

### Establish Priorities

Once the Strengths, Weaknesses, Opportunities and Threats have been identified, use a prioritization process to reduce each of the four lists to the 5 top priorities. Participants can take part in ranking the options in terms of priority and as a result will ultimately influence planning the course of action.

### **Step 3: Take Action**

The final step is initiating the process of turning the results of the SWOT Analysis into something actionable. Encourage group discussion about the four prioritized (SWOT) lists by asking the following questions:

- How can we fully utilize our identified strengths?
- How can we overcome the identified threats?
- What do we need to do to overcome the identified weaknesses?
- How can we take advantage of the identified opportunities?

Explain to the team members that the results of their efforts will be incorporated in the organization's future direction in the form of action plans.

## Appendix A – SWOT Matrix

Strengths (internal)	Priority	Weaknesses (internal)	Priority
○		○	
○		○	
○		○	
○		○	
○		○	
○		○	
Opportunities (external)	Priority	Threats (external)	Priority
○		○	
○		○	
○		○	
○		○	
○		○	
○		○	