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SWOT Analysis

Workshop Kit

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Advisory Services



Implementation Leadership



Expert Advice

Purpose

- To give a structured approach to the ongoing review of critical issues within a company.
- To provide a simple but effective tool to identify essential actions, plan resources and follow up to ensure successful implementation.

Procedure

The SWOT Analysis Workshop Kit has three forms:

1. SWOT Listing
2. SWOT Action Plan
3. Action Plan Listing

Use these in company's in-house workshops.

In-house workshops assist management to identify and track essential actions to improve overall performance and create value.

Workshops can be performed on an as-required frequency as dictated by the company's business environment. They are effective at senior management levels as well as at the department level.

SWOT Listing

Use this form in a workshop/brainstorming session to identify and list all critical issues that should be dealt with by the company. It is a "snap shot" of the company's current reality. **Note: See "Strength and Weakness Features" on page 6 to assist in identifying issues.**

- Strengths** – these are the things the company does well.
- Weaknesses** – these are the things a company needs to improve.
- Opportunities** – these are external factors that could be an advantage if acted upon.
- Threats** - these are external factors that could cause harm.

SWOT Action Plan

Use this form to list each action item listed in the SWOT Listing. If there is more than one action for a SWOT Listing, there should be an Action Plan for each of the actions.

For each action there must be an individual identified as responsible for ensuring the action is completed.

Once the action plan has been identified, the resources necessary to carry out the action must be planned.

- All required resources are listed.
- All available internal resources are identified.
- All missing resources are identified as “shortfall.”
- Specific actions are identified to obtain the “shortfall” in resources.

It is management’s responsibility to identify and provide the necessary resources to their Action Plan team members to ensure each action’s success.

Companies are typically run very lean and therefore it is not unusual that they do not have all the necessary in-house resources to complete all of these essential actions. Atticus Interim Management is available to provide the external resources on an as required bases.

When resources are identified and made available for each action. Start and completion dates are established and entered on the form.

Action Plan Listing Form

Use the Action Plan Listing Form to easily review all actions to be completed. The form identifies the description of the action, person responsible, start date, completion date and notes. The status of each action must be reviewed and updated frequently - at weekly management meetings or other conveniently scheduled timing. One person should be assigned to track all actions and keep this form updated for management review.

Company Name
SWOT Listing
MM/DD/YR

<p>Strengths</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p>	<p>Weaknesses</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p>
<p>Opportunities</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p>	<p>Threats</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p>

Company Name
SWOT Listing
MM/DD/YR

No. From SWOT Listing	SWOT Item Description

Action Plan	
Action	
Responsibility	
Start	
Completion	

Resource Planning

Resources Required	
Financial	
Personnel	
Other	
Resources Available	
Financial	
Personnel	
Other	
Resources Shortfall	
Financial	
Personnel	
Other	

Actions Required to Obtain Required Resources

1	
2	
3	

Strengths and Weakness Features:

Products

Product Quality/Value
Product Line Breadth/Depth
Brand Name Recognition
Advertising/Promotion
Product Leadership

Marketing/Customers

Positioning
Customer Coverage/Diversity
Segment Coverage/Diversity
Geographic Coverage/Diversity
End User Loyalty
Relationship Strength
Number of Clients

Finance

Profitability
Investment Yields
Cash Flow
Equity
Gross Revenues
Revenue Growth
Supplier Credit Levels
Customer Credit Terms

Production/Operations

Cost Production
Locations
Facilities
Proprietary Processes/Systems
Quality Control/Management
Capacity
Flexibility
Vertical Integration

Distribution

Relationships
Control/Ownership Level

Technology

Innovation Level
Research and Development
Access to Outside Resources

Organization

Size
Unity of Purpose
Culture
Decision-making process
Management Depth
Leadership
Human Resource Capability
Structure
Policies and Systems