



How To Run a SWOT Exercise Supporting Strategy

Manager Tools Premium Content

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SWOT Overview

- Strategy Overview
- Create Your Simple SWOT Process
- Trial Balloon Your Simple SWOT Process
- Brief Your Simple SWOT Process To the Boss
- Communicate Your Simple SWOT Process
- Persuade Participants to Work In Advance
- Tightly Schedule Meetings
- Think of SWOT as Strategic Brainstorming
- Everyone Presents
- Follow Up Promptly Each Time
- The NEXT Step is Assessing The Pile of Data

Strategy Overview

- SWOT Is NOT Strategy.
- It Is A Tool To Get A Handle On One's Environment
 - It Never Creates, By Itself, Strategy
- It Simply Makes Possible More Informed Strategic Decisions
- Strategy Is Not Only Choosing A Course Of Action
 - It Is Also Choosing Which Course Of Action NOT To Take
 - ‘We CAN Do That, But We're Not GOING To’

Create Your Simple SWOT Process

- Week One: Create A Set Of Slides That Describe Each Step
 - Email Slides To Your Trial Balloon Friends By End Of Week One
- Week Two: Float Your Trial Balloons
 - Incorporate Their Thoughts Into Your Slides And Process
- Week Three: Brief The Boss
- Week Four: Prep A Set Of Slides For The Boss To Email
 - *Participants Will NOT Freely Brainstorm About Strategy In Front Of One Another Without Having Thought About It In The SWOT Framework*
 - Attendees Must Include All Key Directs Of The Boss
 - Those Who Have A Significant Impact On The Boss's Success
 - No More Than 15 People In The Room

Create Your Simple SWOT Process

- Week Five And Six: Allow Folks To Work On Their Input
 - Visit With EACH At Least Once, Sharing Ideas And Encouraging
 - You're Not Going To Teach Them A Lot Because YOU HAVE NEVER DONE THIS BEFORE
- Weeks Seven Through TWELVE: Have Your Meeting(s)
- You Break The Meeting Down Into External (Opps And Threats) And Then Internal (Strengths And Weaknesses).
 - Everyone Presents Their Slides On External
 - After That, Everyone Cycles Through Again On Internal
- Final Weeks: Put Together A Total Brief For The Boss
 - Consensus Or Decision Is Likely To Have Formed About What She Wants To Do With The Pile Of Stuff She's Got

Trial Balloon Your Simple SWOT Process

- Talk To Some Friends, And/Or Key Directs Of Your Boss
- Show Them The Timeline
- Show Them Your Slides About SWOT,
 - Along With Their Requirement To PRESENT
- Getting Their Input And BUY IN To The Concept
- This Is Not As Hard As You Think
 - You Can't Be Wrong
 - It's Like Brainstorming
- Make Some Adjustments To Obtain Buy In

Brief The Boss

- Show Her The Timeline And The Meeting Details
 - Get Her Inputs And Changes
- Do Your Best To Gain Agreement That This Is HER Process
 - You Are Her FACILITATOR
 - You Are Not “The Strategy Person”
- If The Boss Doesn't Own The Strategy The Strategy Will Fail
- ***If The Boss Doesn't Own The Strategy, The Strategy Will Fail.***
- If The Boss Doesn't Own The Process The Strategy Will Fail

Communicate

- Communicate Your Simple SWOT Process
- Comes FROM THE BOSS
 - A Set Of Slides About The Process
 - The Templates You Want Participants To Use
 - Meeting Requests For The FIRST MEETING
- Includes Your Role As Facilitator
 - How You Will Be Visiting With Everyone In Weeks 5 And 6

Persuade

- Persuade Participants To Work In Advance
- THIS IS A CRITICAL STEP
- The Best Way To Do This: Allow Everyone To Say Whatever They Want While Keeping Within The Templates
 - And Letting The Boss Know That NOW IS THE TIME TO HEAR ALL IDEAS
- This Is HIGHLY Dependent Upon Whether We're Talking About A Homogenous Group
- You're Going To Have To Deal With Some Rebellion, And Probably Allow 1-2 Malcontents To Just Do A Crappy Job
 - That's Okay, As Long There Aren't Just 2 Presenters

Tightly Schedule Meetings

- Tightly Schedule Meetings
- We Recommend Three Hour Meetings TOPS
- First Meeting:
 - Starts With The Boss Talking About Her Need For Strategy
 - What She Wants To Have Come Out Of The Process (Total: 15 Mins)
- TAKE NOTES
- Walk Through Logistics Of The Process, Templates, Etc.
- Discuss This Meetings' Focus: **External**
 - Threat And Opps
- Then Turn It Over To The First Presenter

Tightly Schedule Meetings

- Give Each Participant 30-45 Minutes
 - Depending On The Size Of The Group/Scope
 - At Your First Meeting, You May Have Time For 4-6 Presenters
- Based On Guidelines, You'll Know How Many Meetings To Have
- Don't Try To Do All Of It At Once
 - It's Okay To Have A Few Meetings About External, And Then A Few More About Internal
 - Give Everyone Their Time
 - Whomever Goes First On External Gets To Go Last On Internal

Strategic Brainstorming

- Think Of SWOT As Strategic Brainstorming
- Everyone Presents
- There are No Bad Ideas
- NOW Is The Time For Game Changing Ideas
- At This Point, Your Biggest Danger Is Political Fear and Doubt
- Set An Example of Positive Reinforcement For All Ideas

Follow Up Promptly

- We DO NOT Recommend That Everyone Get Everyone Else's Slides Until The Meeting
- There Will Be Questions Raised, And To Do's Created
- Your Job Is To Communicate Those To Everyone
- Assemble The Master Deck For Each Part Of The Process
 - 24 Hours Is Fine Between Meetings, But You'll Be Busy
 - 48 Hours Is Easier On You, But You'll Lose Flow
- **The NEXT Step Is Assessing The Pile Of Data**
 - **And That Is Boss Dependent**