

# SWOT ANALYSIS MATRIX

## *MS-Excel, MS-PowerPoint & MS-Word Templates User Guide*

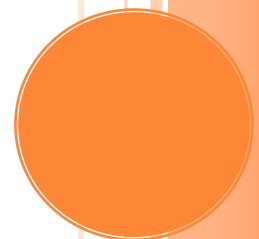
An MS-Excel graphic representation of the results of a SWOT analysis facilitates the quick assimilation of the key features and highlights of the results. The SWOT Chart model differentiates between factors (Strengths, Weaknesses, Opportunities and Threats) of different scales, relevance and strategic impact.

The MS-PowerPoint template allows the user to present the results of SWOT analysis in a PowerPoint presentation.

The MS-Word template allows the user to tabulate and present the results of SWOT analysis in a Word document or report.

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## 1 INTRODUCTION

This guide describes the MS-Excel, MS-PowerPoint and MS-Word templates.

Go to:

[MS-Excel Template](#)

[MS-Word Template](#)

[MS-PowerPoint Template](#)

### 1.1 MS-Excel Charting the Results of a SWOT Analysis

An MS-Excel graphic representation of the results of a SWOT analysis facilitates the quick assimilation of the key features and highlights of the results. The SWOT Chart model differentiates between strengths and weaknesses of different scales, relevance and strategic impact.

At first glance the SWOT analysis technique is not underpinned by a rigorous analytical framework on which to base the chart. The framework presented here allows the SWOT results to be plotted in a logical and meaningful way.

#### **The X-Axis**

Any SWOT internal factor, such as financial resources, management team or market reputation, is in itself neither a Strength nor a Weakness. The availability of substantial financial resources or a strong management team could be deemed to be a Strength while their absence could be deemed as a Weakness. From a graphic representation perspective a Weakness is a negative Strength.

Similarly an external factor can be an Opportunity or Threat to any individual organisation depending on the organisation's ability to exploit it (an Opportunity) or to be negatively impacted by it. (a Threat)

Thus, this first axis (X-axis) measures the scale or magnitude of the SWOT factor. Each internal factor is identified as a Strength or a Weakness and each external factor is defined as an Opportunity or Threat and the relative size is indicated on a scale of 1 to 9, 9 being a very large factor and a 1 being a relatively small factor.

#### **Y-Axis**

All Strengths or Weaknesses are not of equal relevance or immediate impact. The relevance of, say, financial resources is clearly different in a business that requires significant working capital to one that is generating significant positive cash flows.

Similarly, all threats or opportunities do not have the same current relevance or importance.

The second axis (Y-axis) is used to plot the relevance of each SWOT factor. The relative importance or impact is indicated on a scale of 1 to 9, 9 being very significant impact and a 1 being very little impact.

### **Z-Axis**

SWOT analysis is normally used as part of the strategic planning process. Within that context it is appropriate to consider the longer term strategic impact of the relevant SWOT factor on the organisation. The Z-Axis (the diameter of the bubble in a bubble chart) is used to plot the longer term strategic impact.

### **Interpretation**

Items plotted close to the (0,0) are the least significant, either because they are not rated as important or the relevance or impact is very low. Those that are at the extremes of the chart are the largest and are rated as highly relevant.

The size of the bubble indicates the strategic impact of the SWOT factor, the larger the bubble the greater the strategic impact.

## 2 USER INSTRUCTIONS MS-EXCEL

The EXCEL model has a workbook for data entry (sample page 4). Cells in Green are intended for User Input. Cells in Black are calculated and should not be altered by the user.

### Internal SWOT Factors

Internal factors can be classified as Strengths or Weaknesses.

Each factor should be identified as a Strength or Weakness by selecting a S or W from the dropdown list in column B.

Enter the relative size of each factor on a scale of 1 to 9. (1 being a very minor size and 9 being a relatively large)

Enter the relative importance or relevance of each of the factor on a scale of 1 to 9. (1 being a factor of very little relevance and 9 being a very important or highly relevant factor)

Enter the strategic impact of each of the factors on a scale of 1 to 9. (1 being a factor of very little strategic significance and 9 being a factor with a very significant strategic impact).

### External SWOT Factors

External factors can be classified as Opportunities or Threats.

Each factor should be identified as an Opportunity or Threat by selecting an O or T from the dropdown list in column B.

Enter the relative size of each factor on a scale of 1 to 9. (1 being a small size and 9 being a very significant size)

Enter the relative importance or relevance of each of the factor on a scale of 1 to 9. (1 being an importance/impact of very little relevance and 9 being a very important or high impact factor)

Enter the strategic impact of each of the factor on a scale of 1 to 9. (1 being a factor of very little strategic significance and 9 being a factor with a very significant strategic impact)

### SWOT Chart

Once the relevant data is entered the SWOT chart is automatically produced (sample chart page 5).

SWOT Chart				
1. Enter SWOT Factors				
2. Go to SWOT Chart				
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Strengths/ Weaknesses	S/W	Factor Scale/Size (1 to 9)	Relevance/Importance (1 to 9)	Strategic Impact (1 to 9)
Financial resources	S	3	7	6
Market share	S	8	7	5
Brand Image	S	3	3	7
R & D	W	4	7	6
Management Team	S	8	5	8
Manufacturing Technology	W	6	6	3
Good at Acquisitions	S	8	3	7
Patents	W	8	4	6
Strong Customer base	S	4	4	3
Innovation	W	4	4	8
Distribution Network	S	5.5	6	6
Customer Service	W	4.5	5	2
Opportunities/Threats	O/T	Factor Scale/Size (1 to 9)	Relevance/Importance (1 to 9)	Strategic Impact (1 to 9)
Rapid market growth in existing market	O	5	3.5	8
Economic outlook	O	4	6	7
Access to low cost funding	O	7	7	6
Technology/product transition	O	6	5	4
Availability of low cost outsourcing	O	8	8	9
Market for high performance product	T	2	4	6
supply of custom products	T	4	7	3
Internet-based sales	T	4	8.5	7
Green (environmental) lobby	T	5	5	6
Increased regulatory environment	T	2	6	5
Inflation	T	5.5	7.5	1.5
Economic slowdown in existing markets	T	8	2.5	4

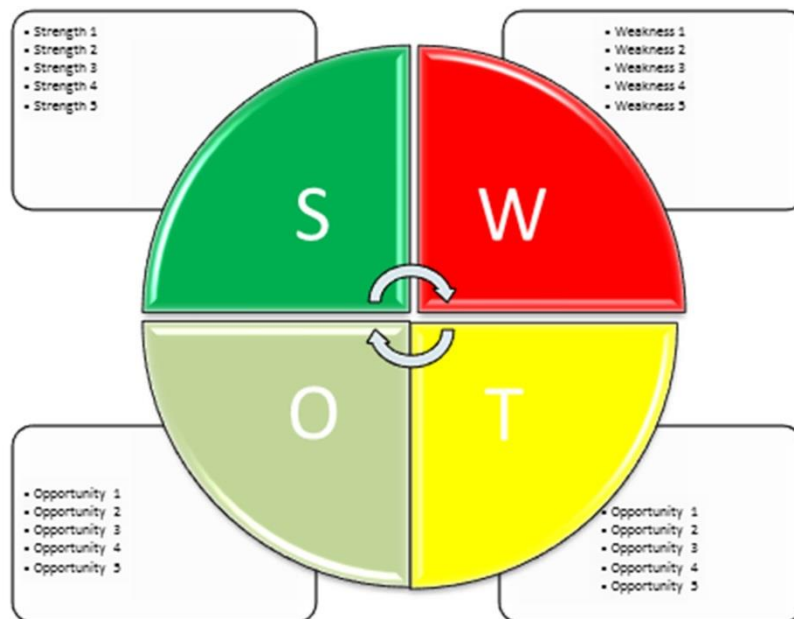
**SWOT Chart**



## 2.1 USER INSTRUCTIONS MS-WORD

The MS-Word templates facilitate presentation of the results of the SWOT analysis in a report/business plan or other MS-Word document.

Select from a choice of four templates (see images below).



SWOT Analysis for _____		Date _____
	Positive	Negative
Internal	<p><u>Strengths</u></p> <ul style="list-style-type: none"> <li>• Strength 1</li> <li>• Strength 2</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> <li>• Weakness 1</li> <li>• Weakness 2</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
	External	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> <li>• Opportunity 1</li> <li>• Opportunity 2</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>

SWOT Analysis for _____		Date _____
	Positive	Negative
Internal	<p><u>Strengths</u></p> <ul style="list-style-type: none"> <li>• Strength 1</li> <li>• Strength 2</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> <li>• Weakness 1</li> <li>• Weakness 2</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
	External	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> <li>• Opportunity 1</li> <li>• Opportunity 2</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>

Caption xxx

MS-Word templates can be copied and pasted into any MS-Word document.

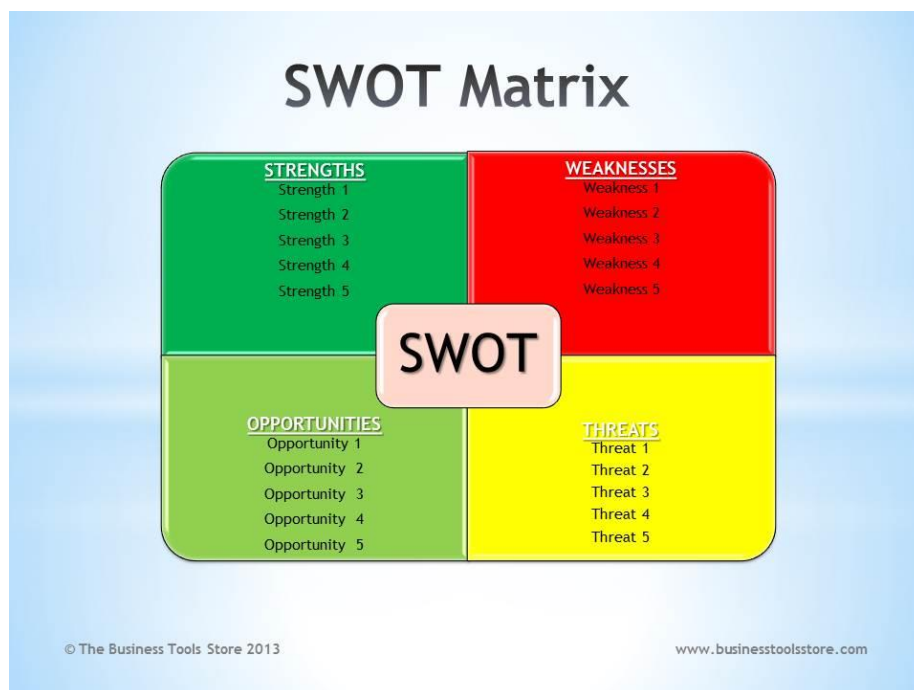
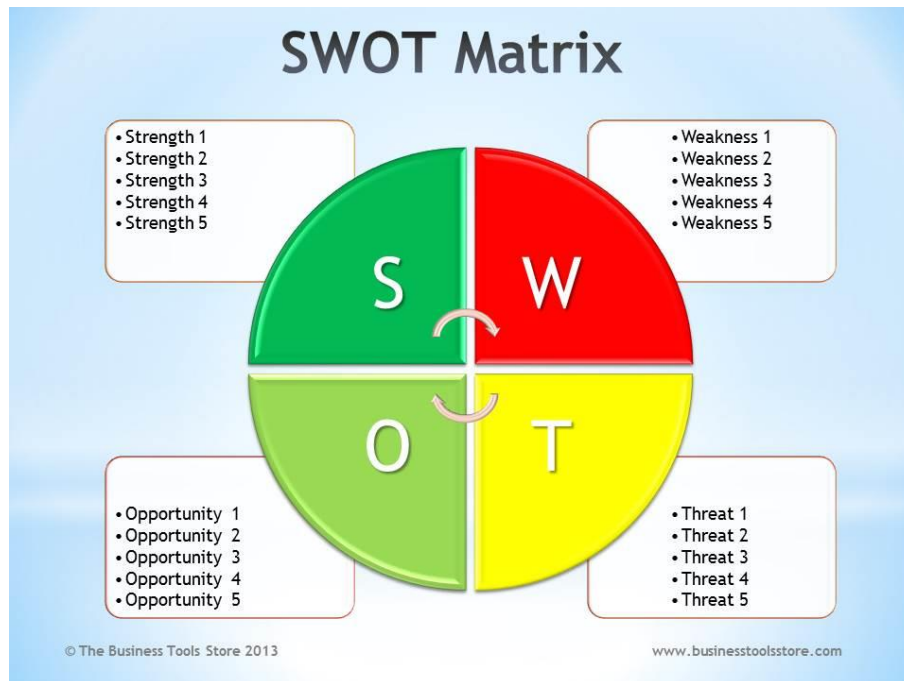
Once it is pasted into the desired location in the document, it can be edited within MS-Word using MS-Word 2007 or a later version. Simply type the various entries in the appropriate cell. The individual cells can be formatted if desired. The two examples of this page use the standard table facility (available in MS-Word 2003 or later versions), while the examples on page 6 uses the SmartArt feature which requires MS-Word 2007.



## 2.2 USER INSTRUCTIONS MS-POWERPOINT

The MS-PowerPoint templates facilitate presentation of the results of the SWOT analysis in a PowerPoint presentation.

Select from a choice of two templates (see images below).



MS-Presentation template can be copied and pasted into any MS-PowerPoint presentation.

Once it is pasted into the desired location in the presentation, it can be edited within MS-PowerPoint using MS-PowerPoint 2007 or a later version using the SmartArt feature. Simply type the various entries in the appropriate cell. The individual cells can be formatted if desired.