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# SWOT Chart User Guide

# Introduction

This guide describes both the MS-Excel and MS-Word templates. Go to:

- [MS-Excel Template](#)

- [MS-Word Template](#)

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

A 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. The different probabilities of threats or opportunities are also incorporated.

The template allows up to 10 factors to be entered for each of the categories: Strengths, Weaknesses, Opportunities or Threats

At first glance the SWOT analysis 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 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.

Thus, this first axis (x-axis) measures the scale or magnitude of the SWOT factor.

### Y-Axis

All strengths or weaknesses do not have the same relevance or importance. The relevance of, say financial resources is clearly different in a business that requires long-term market development and investment to one that is generating significant positive cash flows.

Similarly, all threats or opportunities are not equally likely to materialise. Clearly two threats that have significantly different probabilities of occurring should be treated differently. Thus, it is appropriate to use probability as an axis when plotting threats and opportunities.

The second axis (Y-axis) is used to plot the relevance of strengths or weaknesses and the probability of threats or opportunities as follows:

### Z-Axis

SWOT analysis is normally used as part of the strategic planning process. Within that context it is appropriate to consider the strategic impact of the relevant SWOT factor on the organisation. Two threats with equal probability of occurring can have significantly different impacts, if they occur. The Z-Axis (the diameter of the bubble in a bubble chart) is used to plot the 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 probability is very low.

Those that are at the extremes of the chart are the largest and are rated as highly relevant or a high probability of occurring.

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

# User Instructions

The EXCEL model has a workbook for data entry (sample page 3). Cells in Green are intended for User Input. Cells in Black are calculated and should not be altered by the user.

## SWOT factors
Enter the **SWOT Factors**. Up to 10 factors may be entered for each of the categories: Strengths, Weaknesses, Opportunities or Threats

## Strengths.
For each of the strengths identified

Enter the scale or size of the strength on a scale of 1 to 9. (1 being a very minor strength and 9 being a very significant strength)
Enter the relative importance or relevance of each of the strengths on a scale of 1 to 9. (1 being a strength of very little relevance and 9 being a very important or highly relevant strength)
Enter the strategic impact of each of the strengths if it was to be fully exploited on a scale of 1 to 9. (1 being a strength of very little impact and 9 being a strength with a very significant strategic impact)

## Weaknesses
For each of the weaknesses identified

Enter the scale or size of the weakness on a scale of 1 to 9. (1 being a very minor weakness and 9 being a very significant weakness)
Enter the relative importance or relevance of each of the weaknesses on a scale of 1 to 9. (1 being a weakness of very little relevance and 9 being a very important or highly relevant weakness)
Enter the strategic impact of each of the weaknesses if the organisation was to be fully exposed to the weakness on a scale of 1 to 9. (1 being a weakness of very little impact and 9 being a weakness with a very significant strategic impact)

## Opportunities
For each of the opportunities identified

Enter the scale or size of the opportunity on a scale of 1 to 9. (1 being a very minor opportunity and 9 being a very significant opportunity)
Enter the relative probability of each of the future opportunities  actually arising on a scale of 1 to 9. (1 being an opportunity with very little probability of actually arising and 9 being an opportunity with a very high probability of actually arising)
Enter the strategic impact of each of opportunity if it was to be fully exploited on a scale of 1 to 9. (1 being a opportunity of very little impact and 9 being a   opportunity with a very significant strategic impact)

## Threats
For each of the threats identified

Enter the scale or size of the threat on a scale of 1 to 9. (1 being a very minor threat and 9 being a very significant threat)
Enter the relative probability of each of the future threats actually arising on a scale of 1 to 9. (1 being a threat with very little probability of actually arising and 9 being a threat with a very high probability of actually arising)
Enter the strategic impact of each of the threats if the organisation was to be fully exposed to the threats on a scale of 1 to 9. (1 being a threat of very little impact and 9 being a threat with a very significant strategic impact)

Once the relevant data is entered the SWOT chart is automatically produced (sample chart page 4).
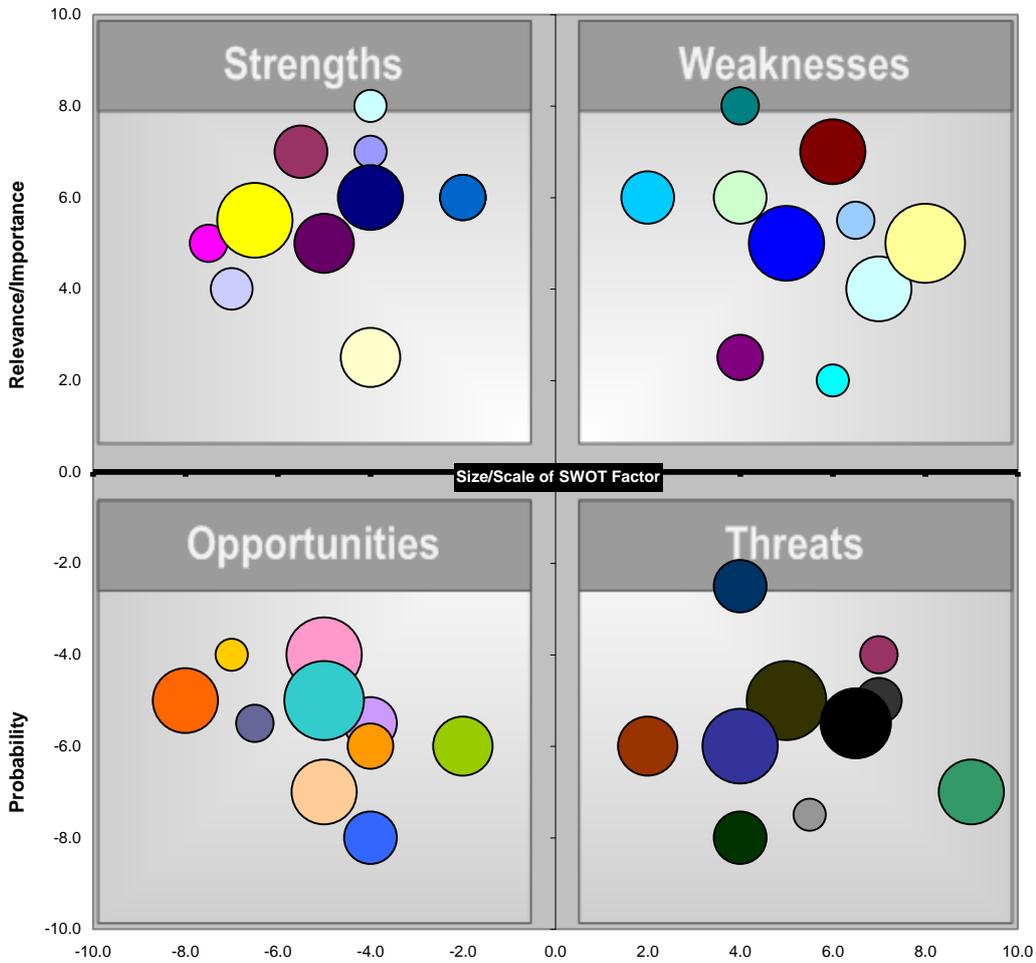
# SWOT Chart

| Strengths | Factor Scale/Size (1 to 9) | Relevance/Importance (1 to 9) | Strategic Impact (1 to 9) |
|---|---|---|---|
| Financial resources | 4 | 7 | 1.5 |
| Market share | 4 | 2.5 | 5 |
| Brand Image | 5.5 | 7 | 4 |
| R & D | 4 | 8 | 1.5 |
| Management Team | 5 | 5 | 5 |
| Manufacturing Technology | 2 | 6 | 3 |
| Good at Acquisitions | 7 | 4 | 2.5 |
| Patents | 4 | 6 | 6 |
| Strong Customer base | 7.5 | 5 | 2 |
| Innovation | 6.5 | 5.5 | 8 |

| Weaknesses | Factor Scale/Size (1 to 9) | Relevance/Importance (1 to 9) | Strategic Impact (1 to 9) |
|---|---|---|---|
| Distribution Channels | 6 | 2 | 1.5 |
| Breath of Product Portfolio | 4 | 2.5 | 3 |
| Cost Base | 6 | 7 | 6 |
| Labour turnover | 4 | 8 | 2 |
| Market Intelligence | 5 | 5 | 8 |
| Location | 2 | 6 | 4 |
| Sales Team | 7 | 4 | 6 |
| Mix of Product & Service Revenue | 4 | 6 | 4 |
| Lack of strong on-line presence | 8 | 5 | 9 |
| Commercialisation of R&D results | 6.5 | 5.5 | 2 |

| Opportunities | Factor Scale/Size (1 to 9) | Probability (1 to 9) | Strategic Impact (1 to 9) |
|---|---|---|---|
| Rapid market growth in existing market | 5 | 4 | 8 |
| Economic outlook | 4 | 5.5 | 4 |
| Access to low cost funding | 5 | 7 | 6 |
| Technology/product transition | 4 | 8 | 4 |
| Availability of low cost outsourcing | 5 | 5 | 9 |
| Market for high performance product | 2 | 6 | 5 |
| supply of custom products for major outlets | 7 | 4 | 1.5 |
| Internet-based sales | 4 | 6 | 3 |
| Partnerships with service organisations | 8 | 5 | 6 |
| Emerging markets in Eastern Europe | 6.5 | 5.5 | 2 |

| Threats | Factor Scale/Size (1 to 9) | Probability (1 to 9) | Strategic Impact (1 to 9) |
|---|---|---|---|
| Inflation | 5.5 | 7.5 | 1.5 |
| Economic slowdown in existing markets | 4 | 2.5 | 4 |
| Cheaper imported products from China | 9 | 7 | 6 |
| Increased regulatory environment | 4 | 8 | 4 |
| Green (environmental) lobby | 5 | 5 | 9 |
| Adverse exchange rates | 2 | 6 | 5 |
| Rapid movement of market to on-line channel | 7 | 4 | 2 |
| major competitor as a result of consolidation | 4 | 6 | 8 |
| New breakthrough technology | 7 | 5 | 3 |
| Lack of supply of skilled R&D labour locally | 6.5 | 5.5 | 7 |

# SWOT Chart



Chart axes:
- Vertical axis (top half): Relevance/Importance, scale 0.0 to 10.0
- Vertical axis (bottom half): Probability, scale 0.0 to -10.0
- Horizontal axis: -10.0 to 10.0
- Center label: Size/Scale of SWOT Factor

Quadrants:
- **Strengths** (top left)
- **Weaknesses** (top right)
- **Opportunities** (bottom left)
- **Threats** (bottom right)

Legend:

| | | |
|---|---|---|
| Financial resources | Market share | Brand Image |
| R & D | Management Team | Manufacturing Technology |
| Manufacturing Technology | Good at Acquisitions | Patents |
| Strong Customer base | Innovation | Distribution Channels |
| Breath of Product Portfolio | Cost Base | Labour turnover |
| Market Intelligence | Location | Sales Team |
| Mix of Product & Service Revenue | Lack of strong on-line presence | Commercialisation of R&D results |
| Rapid market growth in existing market | Economic outlook | Access to low cost funding |
| Technology/product transition | Availability of low cost outsourcing | Market for high performance product |
| supply of custom products for major outlets | Internet-based sales | Partnerships with service organisations |
| Emerging markets in Eastern Europe | Inflation | Economic slowdown in existing markets |
| Cheaper imported products from China | Increased regulatory environment | Green (environmental) lobby |
| Adverse exchange rates | Rapid movement of market to on-line channel | major competitor as a result of consolidation |
| New breakthrough technology | Lack of supply of skilled R&D labour locally | |

# MS-Word SWOT Template

MS-Word template 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 as any standard MS-Word table would be. Simply type in the descriptions of up to ten strengths as shown below in the partially completed example. Similarly edit the list of weaknesses, opportunities and threats.

SWOT Analysis for _____ Date _____

|  | Positive | Negative |
|---|---|---|
| **Internal** | **Strengths**<br>• Strength 1<br>• Strength 2<br>•<br>•<br>•<br>•<br>•<br>•<br>•<br>• | **Weaknesses**<br>• Weakness 1<br>• Weakness 2<br>•<br>•<br>•<br>•<br>•<br>•<br>•<br>• |
| **External** | **Opportunities**<br>• Opportunity 1<br>• Opportunity 2<br>•<br>•<br>•<br>•<br>•<br>•<br>•<br>• | **Threats**<br>• Threat 1<br>• Threat 2<br>•<br>•<br>•<br>•<br>•<br>•<br>•<br>• |

*Caption xxx*