



S.W.O.T. Application Strategy Matrix

Concepts - Questions - Case Study

Significance Factor:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	Row Totals
1 - (Strength) Reputation in community	+1	+1	-1	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1
2 - (Strength) Product reputation	+1	+1	-1	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1
3 - (Strength) Support from CEO	+1	+1	0	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1
7 - (Weakness) Budget limitations	-1	-1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1
8 - (Weakness) Inexperienced HR staff	-1	-1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1
9 - (Weakness) Current salary levels below community average	-1	-1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1
13 - (Opportunity) Increased number of training programs available	+1	+1	0	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1
14 - (Opportunity) Growth of online learning resources	+1	+1	0	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1
15 - (Opportunity) Company announcement of online store	+1	+1	0	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1
19 - (Threat) Sexual harassment situation	-1	-1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1
20 - (Threat) Cost of compliance with new regulations	-1	-1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1
21 - (Threat) Well funded competitor in community	-1	-1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1
Column Totals	+1	+1	-1	0	0	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1	+1

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Joel Barker's Strategic Exploration Tools

S.W.O.T. – Strategy Matrix

S.W.O.T. Analysis (Strengths, Weaknesses, Opportunities, Threats) is the classic, ubiquitous environmental scanning tool that is part of most strategic planning processes. While its proponents point out the value of this early identification of issues, critics often point out the techniques weaknesses with calls for its elimination – or frequent calls for improvements to the technique.

The Critiques

Tom Graves, a consultant from England, presents an alternative (S.C.O.R.E.) with a clear criticism of the traditional technique. While recognizing the value of these analyses for a “quick assessment of strategic issues,” he points out S.W.O.T. results are not measurable. He specifically identifies four major limitations to S.W.O.T.:

- The language can be pejorative, misleading, pointing out that “threat introduces a spurious sense of danger.”
- The boundary between “internal” (Strengths, Weaknesses) and “external” (Opportunities, Threats) is arbitrary.
- Views issues in isolation.
- “Tends to be used ‘once-off,’ then forgotten

All of these criticisms are valid in our experiential base – and Graves provides one of many alternatives that address these issues. The weakness that stands out, because it so clearly affects the next steps in a strategic planning process, is that it generates energy from participants with a “buy-in” for identifying important issues – and frequently is only marginally referenced in the next steps of planning.

In a second (of many) reviews/critiques of the process, an argument against S.W.O.T. is countered by some relevant points. In the critique, Dr. J. Scott Armstrong writes “Don’t do SWOT,” arguing that it “mixes idea generation with evaluation” and “is not justified under any circumstances.” In countering this argument in a blog posting, marketing consultant Ron Shevlin that “it’s an important component...but it must be done right, and in the right context...” He points out that “few firms do SWOT right.”

Shevlin suggests that one of the major opportunities to “do SWOT right” is to make the process more of integral part of the strategic process, not just a process in the beginning. The improvement to a S.W.O.T. analysis described here, based on Joel Barker’s Strategy Matrix, addresses all of the issues identified by these critiques.

Basics and Background

A traditional S.W.O.T. analysis, sometimes even an “ice-breaker” for a strategic planning retreat invites participants to contribute their perceptions on the S.W.O.T. items for their organization. It’s frequently an insightful, energizing start to the hard work of a strategic planning session. But as the following example illustrates, the difficulties with the process are apparent. Items cross boundaries, as mentioned above. A “new competitor” is clearly an external “threat.” But a “Sexual Harassment Incident” is an internal “threat.” Opportunities are a mix of both internal and external. If a facilitator insists on precisely classifying the items according to the conceptual definitions, the session can quickly deteriorate into a debate over the process rather than the value.

SWOT ANALYSIS



<p>Strengths</p> <ul style="list-style-type: none"> •Reputation in Community •Product Reputation •Strong Support from CEO •Innovative Product Development •Strong Retailer Support •Interest in Model Railroading 	<p>Weaknesses</p> <ul style="list-style-type: none"> •Budget Limitations •Inexperienced HR Staff •Current Salary Levels •Poor Benefit Package •Difficulty Measuring Results •Outdated IT Systems
<p>Opportunities</p> <ul style="list-style-type: none"> •Number of Training Programs •Online Learning Resources •Internet Store •Product Acquisition •HR Professional Certification •College HR Intern Program 	<p>Threats</p> <ul style="list-style-type: none"> •Sexual Harassment Incident •Cost of Compliance •New Competitor •Increasing Govt. Regulation •Rising Health Care Costs •Imported Competitive Products

But more importantly, the challenge is making use of potentially valuable information generated in what is typically a positive collaborative effort. There’s value in this information – if it’s examined more closely. There’s “gold” in these analyses.

<p>Strengths</p> <ul style="list-style-type: none"> •Reputation in Community •Product Reputation •Strong Support from CEO •Innovative Product Development •Strong Retailer Support •Interest in Model Railroading 	<p>Weaknesses</p> <ul style="list-style-type: none"> •Budget Limitations •Inexperienced HR Staff •Current Salary Levels •Poor Benefit Package •Difficulty Measuring Results •Outdated IT Systems
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Strategic Exploration

Because a S.W.O.T. analysis is frequently a first step, environmental scanning part of a strategic planning process, it falls into the category that futurist Joel Barker labels “strategic exploration.” The Strategic Exploration Tools from Joel Barker represent “what you do before you plan.” During the development of an upgraded version of software for one of Joel Barker’s Strategic Exploration Tools, the Strategy Matrix®, we identified a potential pathway for providing a significantly improved version of the S.W.O.T. analysis.

The Strategy Matrix® provides decision-enhancing information on how trends, innovations, policy, changes, or competitor actions affects an organization’s strategic objectives and key characteristics.

When applied to an organization’s strategic objectives and key characteristics, the Strategy Matrix offers multiple benefits:

- Create an ongoing process for exploring the strategic landscape.
- Set priorities for choices in organizational direction, marketing, and product development.
- Determine vulnerability of strategic objectives to competitor’s actions.
- Test the efficacy of new strategic objectives on already committed-to objectives.
- Track environmental forces.
- Guide strategy discussion efficiently and fairly in a way that gives everyone the opportunity to contribute.

Strategy Matrix – Case Study

A statewide group of Small Business Development Center (SBDC) leaders (Regional Center Directors from throughout the state) created a S.W.O.T. analysis in the midst of significant strategic issues. The organization’s key strategic objectives, already identified, were reviewed and edited. The Key Characteristics, factors essential in defining the character (positive and/or negative) of the organization, were identified.

This provides an excellent opportunity to examine the limits of a traditional S.W.O.T. analysis and show how Joel Barker’s Strategy Matrix® can be applied to produce dramatically improved results – giving leaders clear guidance on priorities and potential actionable items.

The basics of this process would look like a traditional S.W.O.T. analysis:

Strengths	Weaknesses
General Knowledge of Directors	Lack of Common Vision
Community Partnering and Relationships	Flat Funding
Educational Institution Hosts	Specialized Knowledge, i.e., International
Opportunities	Threats
Creating Strong Relationship with New State Government	Not Expanding SBDC Consulting and Training Efforts to Existing Businesses
Advantage of Current Rural Environment	Lack of Trust among Regions and Lead Centers
Chaos in State Economic Development	Ability to Measure Impact

This simple example also reveals the weaknesses of the basic process. It fails to answer some basic questions:

1. Which of these strengths is most supportive of the organization’s strategic objectives?
2. Which of these weaknesses is potentially going to most negatively impact their strategic objectives?
3. Which of these opportunities should be seized to further their strategic objectives?
4. Which of these threats is going to most seriously threaten the organization’s ability to achieve its strategic objectives?
5. Which of these S.W.O.T. factors enhance or threaten the key characteristics of the organization?

These basic five questions provide just a small insight into the potential of conducting an improved version of the S.W.O.T. analysis. For this simple example, it will be possible to identify more than a dozen key elements.

Beginning with a Steven Covey inspired “end in mind,” what if you had a summary evaluation of these factors that indicated the short-term/long-term (organization defined) impact of these S.W.O.T. factors, including the overall impact on the organization’s strategic objectives and key characteristics measured both in a positive and negative sense. The Strategy Matrix produces these overall results:

Strengths		ST	LT	Weaknesses		ST	LT
General Knowledge of Directors		16	10	Lack of Common Vision		5	3
		-3	-5			-23	-29
Community Partnering and Relationships		21	20	Flat Funding		0	0
		-4	-6			-25	-25
Educational Institution Hosts		11	15	Specialized Knowledge, i.e., International		0	3
		-4	-6			-18	-5
Opportunities		ST	LT	Threats		ST	LT
Creating Strong Relationship with New State Government		18	20	Not Expanding SBDC Consulting and Training Efforts to Existing Businesses		6	3
		-5	-3			-12	-13
Advantage of Current Rural Environment		14	26	Lack of Trust among Regions and Lead Centers		3	5
		-1	-5			-20	-26
Chaos in State Economic Development		7	10	Ability to Measure Impact		6	9
		-1	0			-8	-12

This information makes it possible to answer some of the key questions. It establishes overall priorities in each of the categories. It answers the first four of the five basic questions identified above. However, as suggested above the Strategy Matrix® has the potential to uncover more “gold.”

The overall Strategy Matrix® analysis provides extensive data – fortunately it is presented in a format, with additional tools for analysis that makes it easy to interpret. The overall analysis does graphically show the basic power of a S.W.O.T. analysis, the colors clearly identifying the overall positive (blue) and negative (red) factors.



ST: 2 Years
LT: 5 Years

Significance Factor:

	A - To align the USBDC with current political thinking on economic development.	B - To create a common vision for the SBDC.	C - To develop a positive reputation and support for services beyond start-up.	D - To develop a positive entrepreneurial statewide program.	E - To enhance technological proficiency of staff.	F - SBA Oversight	G - Statewide coverage	H - Flat funding	Key Characteristic Subtotals	Row Totals	
	+1	+1	+1	+1	+1		-1	+1	-1		
1 - [Strength] General Knowledge of Directors	+3 +1	+5 +1	+5 +5	0 0	+3 +3	+16 0 +10	-3 -5	0 0	0 0	0 -3 -5 0	+16 -3 -5 +10
2 - [Strength] Community Partnering and Relationships	+5 +5	-1 -1	+5 +5	+5 +5	0 0	+15 -1 +15	+1 0	+5 +5	-3 -5	+6 -3 -5 +5	+21 -4 -6 +20
3 - [Strength] Educational Institution Hosts	+1 +3	0 0	+3 +5	+1 +1	+1 +1	+6 0 +10	0 0	+5 +5	-3 -3	+5 -3 -3 +5	+11 -3 -3 +15
4 - [Weakness] Lack of Common Vision	-3 -5	+5 +3	-5 -5	-5 -5	-3 -3	+5 -16 -18 +3	-3 -3	-3 -5	-1 -3	0 -7 -11 0	+5 -23 -29 +3
5 - [Weakness] Flat Funding	-1 -1	-1 -1	-3 -5	-5 -3	-5 -5	0 -15 -15 0	0 0	-5 -5	-5 -5	0 -10 -10 0	0 -25 -25 0
6 - [Weakness] Specialized Knowledge, i.e., International, SBIR	-3 +1	0 0	-5 +1	0 0	-5 +1	0 -13 0 +3	0 0	0 0	-5 -5	0 -5 -5 0	0 -18 -5 +3
7 - [Opportunity] Creating Strong Relationship with New State Government	+5 +5	+1 +3	+3 +3	+5 +3	+1 +1	+15 0 +15	0 0	+3 +5	-5 -3	+3 -5 -3 +5	+18 -5 -3 +20
8 - [Opportunity] Advantage of Current Rural Environment	+5 +5	+3 +3	+1 +5	+1 +5	+1 +3	+11 0 +21	0 0	+3 +5	-1 -5	+3 -1 -5 +5	+14 -1 -5 +26
9 - [Opportunity] Chaos in State Economic Development	+3 +5	+1 +3	0 0	0 0	0 0	+4 0 +8	0 0	-1 +1	+3 +1	+3 -1 0 +2	+7 -1 0 +10
10 - [Threat] Not Expanding SBDC Consulting and Training Efforts to Existing Businesses.	-3 -1	-3 -3	-5 -5	0 0	-1 -1	0 -12 -10 0	0 0	+3 -3	+3 +3	+6 0 -3 +3	+6 -12 -13 +3
11 - [Threat] Lack of Trust among Regions and Lead Centers.	-5 -5	-5 -5	-3 -5	-1 -3	-1 -3	0 -15 -21 0	0 0	-5 -5	+3 +5	+3 -5 -5 +5	+3 -20 -26 +5
12 - [Threat] Ability to Measure Impact	-5 -5	-1 -3	-1 -3	0 0	-1 -1	0 -8 -12 0	+1 +3	0 +1	+5 +5	+6 0 0 +9	+6 -8 -12 +9
Column Totals	+22 -20 +25	+15 -17 +13	+17 -11 +24	+12 -23 +14	+6 -11 +9		+2 -6 +3	+19 -8 +22	+14 -18 +14		+ST -ST +LT -LT

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If the last column is examined closely, it reveals the overall short- and long-term impact of these factors on the organization. The software allows the sorting of this information to reveal an even clearer picture of these impacts. The following, based on sorting the data for short-term, positive results, shows the top results are both from “strengths” and “opportunities.”

Joel Barker's STMA RISK MAT TEGY		A - To align the USBDC with current political thinking on for the SBDC.	B - To create a common vision reputation and support to services beyond start-up.	C - To develop a positive entrepreneurial statewide program.	D - To enhance technological proficiency of staff.	E - To develop an effective Strategic Objective Subtotals	F - SBA Oversight	G - Statewide coverage	H - Flat funding	Key Characteristic Subtotals	Row Totals
Significance Factor:		+1	+1	+1	+1	+1		-1	+1	-1	
1 - [Strength] Community Partnering and Relationships	+5 +5	-1 -1	+5 +5	+5 +5	0 0	+15 -1	+1 0	+5 -3	-3 -5	+6 -3	+21 -4
2 - [Opportunity] Creating Strong Relationship with New State Government	+5 +5	+1 +3	+3 +3	+5 +3	+1 +1	+15 0	0 0	+3 +5	-5 -3	+3 +5	+18 +20
3 - [Strength] General Knowledge of Directors	+3 +1	+5 +1	+5 +5	0 0	+3 +3	+16 0	-3 -5	0 0	0 0	0 -3	+16 -3
4 - [Opportunity] Advantage of Current Rural Environment	+5 +5	+3 +3	+1 +5	+1 +5	+1 +3	+11 +21	0 0	+3 +5	-1 -5	+3 +5	+14 +26
5 - [Strength] Educational Institution Hosts	+1 +3	0 0	+3 +5	+1 +1	+1 +1	+6 +10	0 0	+5 +5	-3 -3	+5 +5	+11 +15
6 - [Opportunity] Chaos in State Economic Development	+3 +5	+1 +3	0 0	0 0	0 0	+4 +8	0 0	-1 +1	+3 +1	+3 +2	+7 +10

This shows the advantages that a more detailed analysis that a S.W.O.T. analysis can reveal. It enables the analysis to provide more detailed answers to the basic questions asked above.

Which of these factors presents the organization...?

- With the greatest overall impact (positive or negative) on the organization’s Strategic Objectives?

Is the organization being impacted more...?

- By its strengths or weaknesses?
- By its opportunities or threats?
- By short term or long term factors?

Then, when we pan for the gold in this overall analysis, it becomes even clearer where the detailed value of the process lies – by looking more closely at the individual sections. At the same time, this reveals that the application answers many more questions than a traditional S.W.O.T. analysis can even begin to ask.

Strengths

S.W.O.T. Strengths

Team Members: Jim Schreier, Facilitator

 ST: 2 Years LT: 5 Years Significance Factor:	A - To align the USBDC with current political thinking on economic development.	B - To create a common vision for the SBDC.	C - To develop a positive reputation and support to services beyond start-up program.	D - To develop an effective entrepreneurial statewide proficiency of staff.	E - To enhance technological proficiency of staff.	Strategic Objective Subtotals		F - SBA Oversight	G - Statewide coverage	H - Flat funding	Key Characteristic Subtotals		Row Totals
	+1	+1	+1	+1	+1			-1	+1	-1			
1 - [Strength] General Knowledge of Directors	+3 +1	+5 +1	+5 +5	0 0	+3 +3	+16 0	+10 0	-3 -5	0 0	0 0	0 -3	-5 -5	+16 -5
2 - [Strength] Community Partnering and Relationships	+5 +5	-1 -1	+5 +5	+5 +5	0 0	+15 -1	-1 +15	+1 0	+5 +5	-3 -5	+6 -3	-5 -5	+21 -6
3 - [Strength] Educational Institution Hosts	+1 +3	0 0	+3 +5	+1 +1	+1 +1	+6 0	0 +10	0 0	+5 +5	-3 -3	+5 -3	-3 -3	+11 +15
Column Totals	+9 0	+5 -1	+13 0	+6 0	+4 0			+1 0	+10 +10	0 0	-6 -8	0 0	+ST -ST

Which of the organization's strengths actually has a negative impact (short- and long-term) on one of the organization's Strategic Objectives?

Which of the organization's strengths is actually making it harder to eliminate one of the organization's negative Key Characteristics?

Which of the organization's Strategic Objectives is getting the most support from these strengths?

Weaknesses

S.W.O.T. Weaknesses

Team Members: Jim Schreier, Facilitator

 ST: 2 Years LT: 5 Years Significance Factor:	A - To align the USBDC with current political thinking on economic development.	B - To create a common vision for the SBDC.	C - To develop a positive reputation and support to services beyond start-up program.	D - To develop an effective entrepreneurial statewide proficiency of staff.	E - To enhance technological proficiency of staff.	Strategic Objective Subtotals		F - SBA Oversight	G - Statewide coverage	H - Flat funding	Key Characteristic Subtotals		Row Totals
	+1	+1	+1	+1	+1			-1	+1	-1			
1 - [Weakness] Lack of Common Vision	-3 -5	+5 +3	-5 -5	-5 -5	-3 -3	+5 -16	-18 +3	-3 -3	-3 -5	-1 -3	0 -7	-11 -11	+5 -23
2 - [Weakness] Flat Funding	-1 -1	-1 -1	-3 -5	-5 -3	-5 -5	0 -15	-15 -15	0 0	-5 -5	-5 -5	-10 -10	-10 -10	0 -25
3 - [Weakness] Specialized Knowledge, i.e., International, SBIR	-3 +1	0 0	-5 +1	0 0	-5 +1	0 -13	0 +3	0 0	0 0	-5 -5	0 -5	-5 -5	0 -5
Column Totals	0 -7	+5 -6	0 -1	0 -1	0 -13	0 -10	0 -8	-13 -13	0 -3	0 -3	-8 -10	-11 -13	+ST -ST

Which of these weaknesses is actually making it easier to the organization to accomplish one of its Strategic Objectives? (This one is easy)

Opportunities

S.W.O.T. Opportunities

Team Members: Jim Schreier, Facilitator

 ST: 2 Years LT: 5 Years Significance Factor:		A - To align the USBDC with current political thinking on economic development.	B - To create a common vision for the SBDC.	C - To develop a positive reputation and support for services beyond start-up.	D - To develop an effective entrepreneurial statewide program.	E - To enhance technological proficiency of staff.	Strategic Objective Subtotals		F - SBA Oversight	G - Statewide coverage	H - Flat funding	Key Characteristic Subtotals		Row Totals
		+1	+1	+1	+1	+1			-1	+1				
1 - [Opportunity] Creating Strong Relationship with New State Government	+5 +5	+1 +3	+3 +3	+5 +3	+1 +1	+15 +15	0 0	0 0	+3 +5	-5 -3	+3 -3	+3 +5	+18 +20	
2 - [Opportunity] Advantage of Current Rural Environment	+5 +5	+3 +3	+1 +5	+1 +5	+1 +3	+11 +21	0 0	0 0	+3 +5	-1 -5	+3 -5	+3 +5	+14 +26	
3 - [Opportunity] Chaos in State Economic Development	+3 +5	+1 +3	0 0	0 0	0 0	+4 +8	0 0	0 0	-1 +1	+3 +1	+3 -1	+3 -1	+7 +10	
Column Totals	+13 0 +15	+5 0 +9	+4 0 +8	+6 0 +8	+2 0 +4				0 0 +6	0 0 -11	+3 -6 +1	+3 -8 +1	+ST -ST +LT	

Is there something unique that can be identified from these opportunities?

Threats

S.W.O.T. Threats

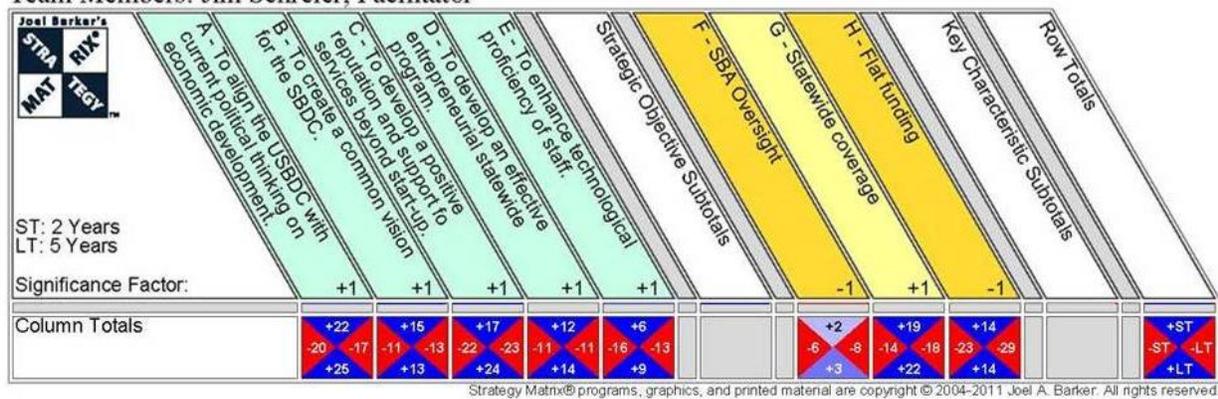
Team Members: Jim Schreier, Facilitator

 ST: 2 Years LT: 5 Years Significance Factor:		A - To align the USBDC with current political thinking on economic development.	B - To create a common vision for the SBDC.	C - To develop a positive reputation and support for services beyond start-up.	D - To develop an effective entrepreneurial statewide program.	E - To enhance technological proficiency of staff.	Strategic Objective Subtotals		F - SBA Oversight	G - Statewide coverage	H - Flat funding	Key Characteristic Subtotals		Row Totals
		+1	+1	+1	+1	+1			-1	+1				
1 - [Threat] Not Expanding SBDC Consulting and Training Efforts to Existing Businesses.	-3 -1	-3 -3	-5 -5	0 0	-1 -1	-12 -10	0 0	0 0	+3 -3	+3 +3	+6 -3	+6 -3	+6 -13	
2 - [Threat] Lack of Trust among Regions and Lead Centers.	-5 -5	-5 -5	-3 -5	-1 -3	-1 -3	-15 -21	0 0	0 0	-5 -5	+3 +5	+3 +5	+3 +5	+3 -26	
3 - [Threat] Ability to Measure Impact	-5 -5	-1 -3	-1 -3	0 0	-1 -1	-8 -12	0 0	+1 +3	0 +1	+5 +5	+6 +5	+6 +5	+6 -12	
Column Totals	-13 0 0	-11 0 -9	-11 0 -9	-13 0 -9	-3 0 -3	-5 0 -5			+1 0 +3	+3 -5 +1	+11 -8 +13	+11 0 +13	+ST -ST +LT	

Which of these threats might actually make it easier for the organization to eliminate one of these Key Characteristics?

Strategic Objectives

The Strategy Matrix S.W.O.T. application provides another level of analysis by looking at the column totals for both Strategic Objectives and Key Characteristics. And with this, additional questions not answered by the traditional approach.



In terms of these specific S.W.O.T. factors, which of this organization’s Strategic Objectives is being most impacted...?

Positively or Negatively by these forces?

Which of this organization’s Strategic Objectives is being least impacted (both short- and long-term) by these factors?

An Important Note

The questions identified here have been developed in conjunction with the specific S.W.O.T. example. However, it is easy to see how the questions could be organized and generalized to interrogate – along with additional questions – any S.W.O.T. example.

Graphing Feature

In addition to the multiple analyses shown here, the information from the Strategy Matrix can also be plotted in a graphic format – which in essence creates a “Force-Field Analysis” for the factors selected. Here’s an example of this feature:

