2021

An Instruction Manual

Tools and Processes for Conducting a Remote SWOT Analysis

Prepared by the National EMS for Children Data Analysis Resource Center (*NEDARC*)

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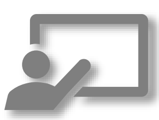
Evaluation

Strategic Planning

Remote



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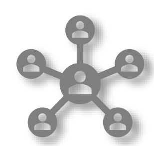
Project Manager



Participating Stakeholders

Acknowledgements for Feedback

- Patty Schmuhl, NEDARC Data Manager
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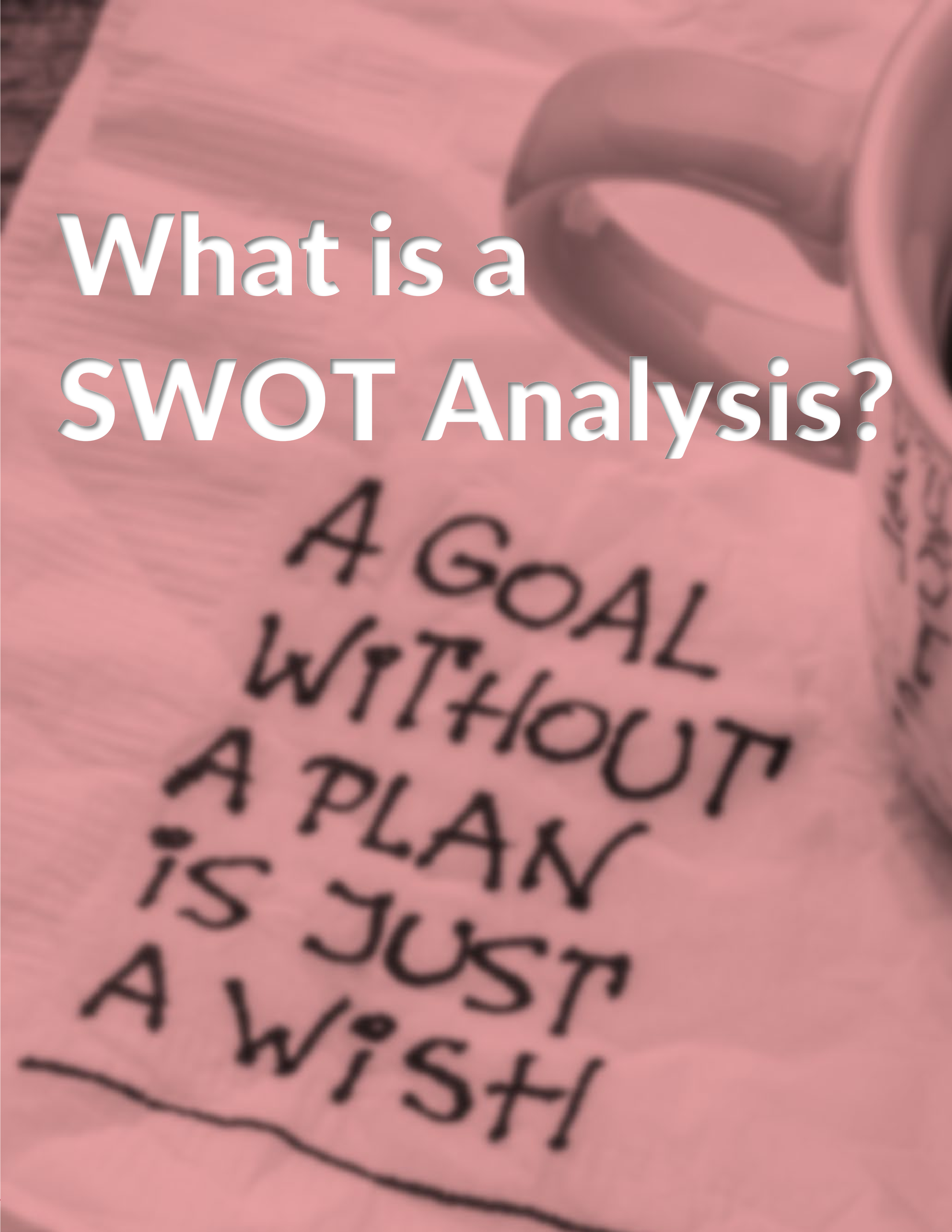
What is a SWOT Analysis?



SWOT stands for

STRENGTHS **WEAKNESSES** **OPPORTUNITIES** **THREATS***

**Sometimes* CHALLENGES *is used instead of* THREATS

A SWOT analysis is a technique for assessing four aspects (Strengths, Weaknesses, Opportunities, and Threats) of your process, project, or organization's current position before you decide on any new strategy.

The SWOT analysis will help you find out what's working well and opportunities for improvement. Ask yourself **where** you want to go, **how** you might get there, and **what** might get in your way. These three are big issues and SWOT is a powerful but simple technique to help you achieve your goals.

Conducting a SWOT analysis may not be a regular part of your everyday workflow, and how to conduct one efficiently can be a bit of a challenge. The challenges to conducting a SWOT analysis can be compounded when moving it from an in-person to a remote/virtual setting. The National EMS for Children Data Analysis Resource Center (NEDARC) staff piloted developing and conducting a 100% remote SWOT analysis in 2020 due to continued COVID social distancing protocols.

The purpose of this instruction manual is to familiarize you with the process NEDARC staff developed for conducting a remote SWOT analysis and to guide you through the series of stages that lead to the completion of a remote SWOT analysis.

While the process we developed is not the only possibility for conducting a remote SWOT, it serves a solid guide. The process and resources we developed are outlined in 10 SWOT stages. Each stage of the remote SWOT analysis is covered as a separate section of this instruction manual.

The remote SWOT analysis process we developed is as follows:

- SWOT: Stage 1 - SWOT Question Development
- SWOT: Stage 2 - Brainstorming via Online Survey
- SWOT: Stages 3-6 - Four Facilitated Live Remote Meetings
- SWOT: Stage 7 - Ranking Grouped Ideas via Online Survey
- SWOT: Stage 8 - Work Groups
- SWOT: Stage 9 - Summary Report
- SWOT: Stage 10 - Operationalization

We created a Remote SWOT Analysis Process PowerPoint Template (see the Remote SWOT Analysis Process PowerPoint Template discussed in Step 1). Instructions—associated with each stage covered in the PowerPoint and with each slide—are located in the slide notes areas of this template.

NEDARC's 10-Stage Remote SWOT Analysis Process

Stages 3-6 - Four Facilitated Live Remote Meetings

Stage 1 - SWOT Question Development

Stage 9 - Summary Report

Stage 7 - Ranking Grouped Ideas via Online Survey

Stage 2 - Brainstorming via Online Survey

Stage 10 - Operationalization

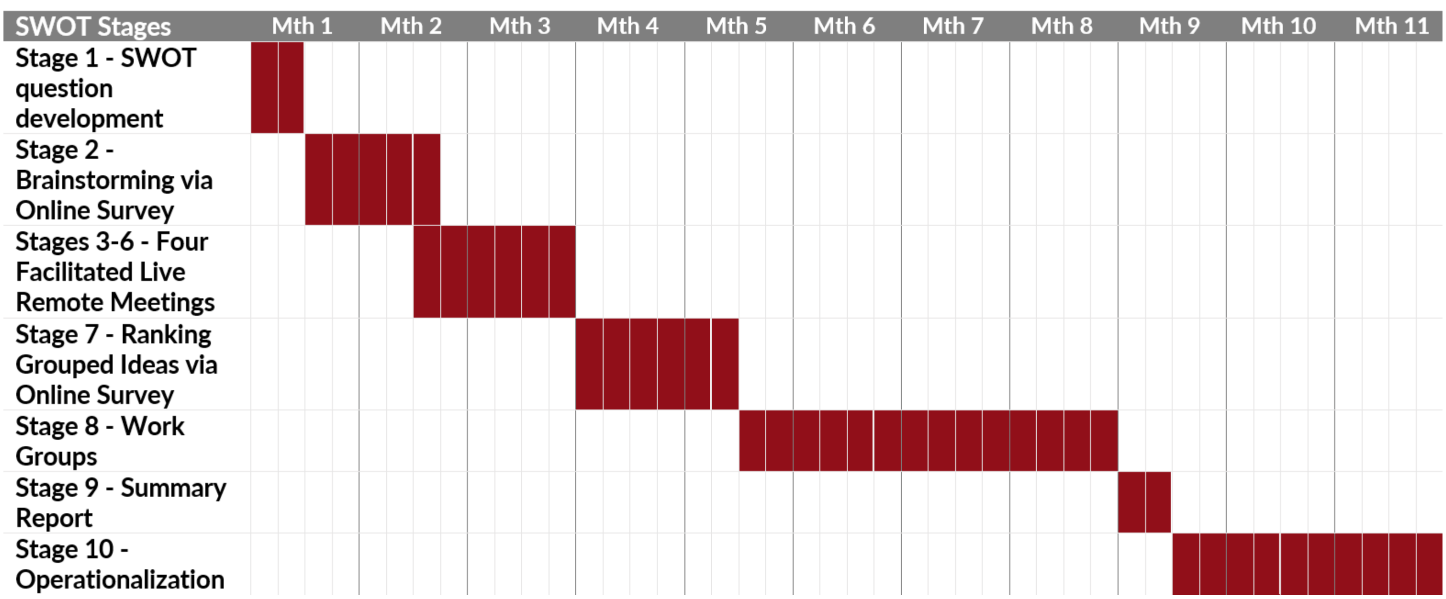
Stage 8 – Work Groups

SWOT Analysis Process Estimated Total Time Commitment

Conducting a SWOT analysis is a **time-intensive** endeavor. Based on the amount of time it took NEDARC staff to complete all 10 stages of our remote SWOT analysis with **6** participants you can expect for participants to devote about 40 hours per person across stages 2 through 9. If any of your staff will also be facilitating as well as participating in the process, you will need to add on an additional 20-40 hours for them to complete the preparation and analysis work for each stage. It's safe to say that to complete a SWOT analysis is 40-80 hours of dedicated time **per participant**, excluding the operationalization of the goals and objectives. While the process could take up to 80 hours of concerted time for 6 participants, not all participants are able to drop what they are working on and devote all of their time to completing the SWOT analysis process. Thus, while it took the NEDARC staff about 80 hours per participant to complete, that time was spread over a 6-month span of time.

Please keep in mind that if you have more than 8 participants, the number of hours for each stage and total amount of months to finish the entire process will need to increase exponentially. The NEDARC staff leading our remote SWOT analysis have a strong background in facilitating SWOT analyses and were able to complete the entire process likely quicker than you will be able. Therefore, we created a more **realistic timeline** to visualize the time required for you to complete a remote SWOT analysis based on the 10-stage process outlined in this instruction manual.

To help you plan and conduct your remote SWOT analysis, we have outlined the approximate amount of time for each of the stages. Please note it may take you up to **8 months** to complete the stages involved in the SWOT analysis. After you complete the SWOT analysis it will take you and additional **3+ months** to write your report and to at least start operationalizing the goals and objectives.

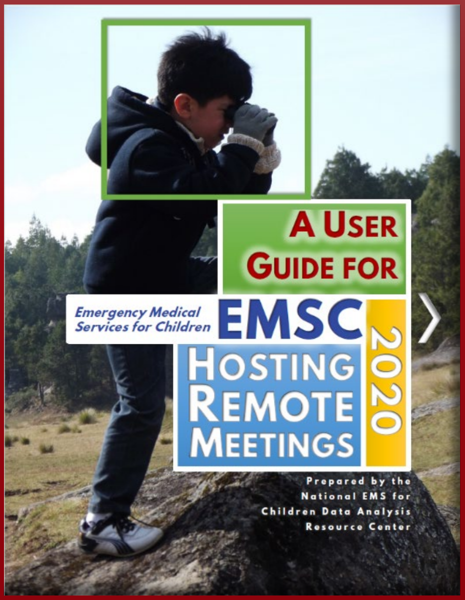


Additional Resources

There are three resources you will find useful for planning and facilitating a remote SWOT analysis.

1. A User Guide for Hosting Remote Meetings (free PDF download)
   This remote meeting user guide was developed by NEDARC and can assist you in conducting high quality remote meetings.
2. Sam Kaner's *Facilitator's Guide to Participatory Decision-Making* (book for purchase)
3. Tools & Skills for Engaging Stakeholders (free PDF download)
   This NEDARC resource is a PDF version of the booklet with instructions and screen shots used at one of our workshops. Skills taught at the workshop included how to identify and engage stakeholders, host high quality meetings, and basic facilitation skills.

1



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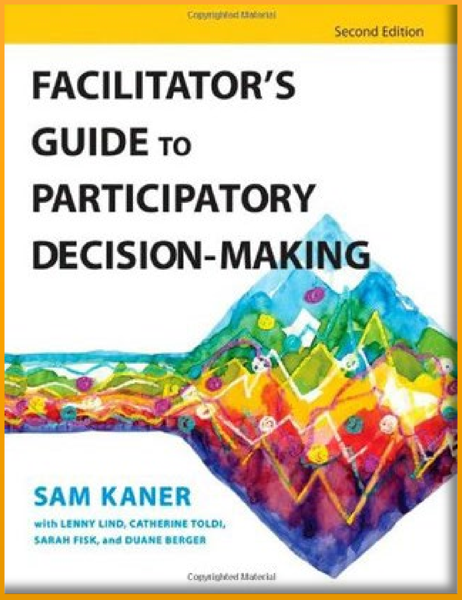

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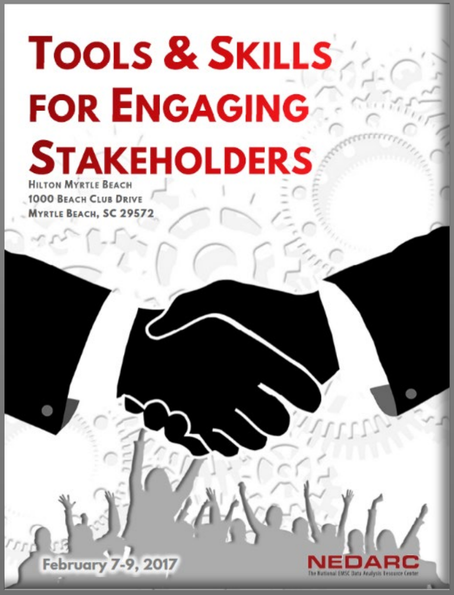


SWOT: Stage 1 - SWOT Question Development

Step 1

The first step that has to be completed before you can move on with a SWOT analysis is developing the question that you want to use to analyze your process, project, or organization. **Don't skip this step!** This step is crucial and if it is not thought out then the rest of the process will not work or you will always be coming back to this point, trying to clarify what you are trying to improve. Your question is tied to your goal for conducting a SWOT analysis.

To develop your question, you would fill in the blank to the question below:

What are some of the STRENGTHS, WEAKNESSES, OPPORTUNITIES, or THREATS of (*the process, project, or organization you want to analyze*)?

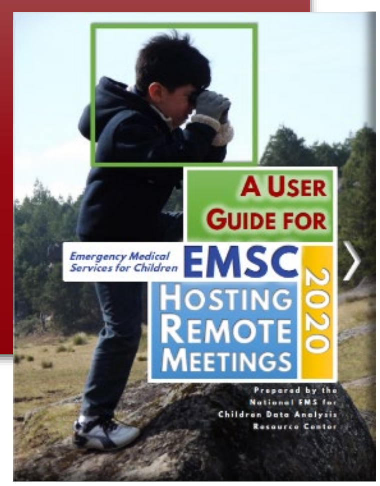
Here is an example of the question we used to figure out how to develop and conduct a remote SWOT analysis. We had recently concluded the first annual data collection of over 16,000 EMS agencies in the US and we wanted to identify opportunities for improvement for the next round of data collection by analyzing and evaluating the process.

- What are some of the STRENGTHS of ***NEDARC's internal Annual Data Collection system/process***?
- What are some of the WEAKNESSES of ***NEDARC's internal Annual Data Collection system/process***?
- What are some of the OPPORTUNITIES of ***NEDARC's internal Annual Data Collection system/process***?
- What are some of the THREATS of ***NEDARC's internal Annual Data Collection system/process***?

Step 2

Along with developing your SWOT question you will also want to plan out the timeline for each of the SWOT stages along with planning participant duties. For example, who will be the lead facilitator and who will create the surveys? Since it can be challenging to find time on stakeholders' calendars when every intended participant will be available to attend the Four Facilitated Live Remote Meetings this is the point when you might want to start planning out when those 4 meetings will occur which is up to a month before the live remote meetings.

The NEDARC resource, A User Guide for Hosting Remote Meetings has a section devoted to how to plan the logistics and schedule times for a remote meeting.



After agreeing upon your SWOT question and making your timeline, you are ready to move on to Stage 2 - Brainstorming via Online Survey.

Stage 1 Estimated Time Commitment and Who is Involved

Time Commitment

SWOT Stages	Mth 1			
Stage 1 - SWOT question development				
Step 1				
Step 2				

Step 1

Step 1 of this stage should be relatively quickly completed and should only take about **15 minutes** of time.

Step 2

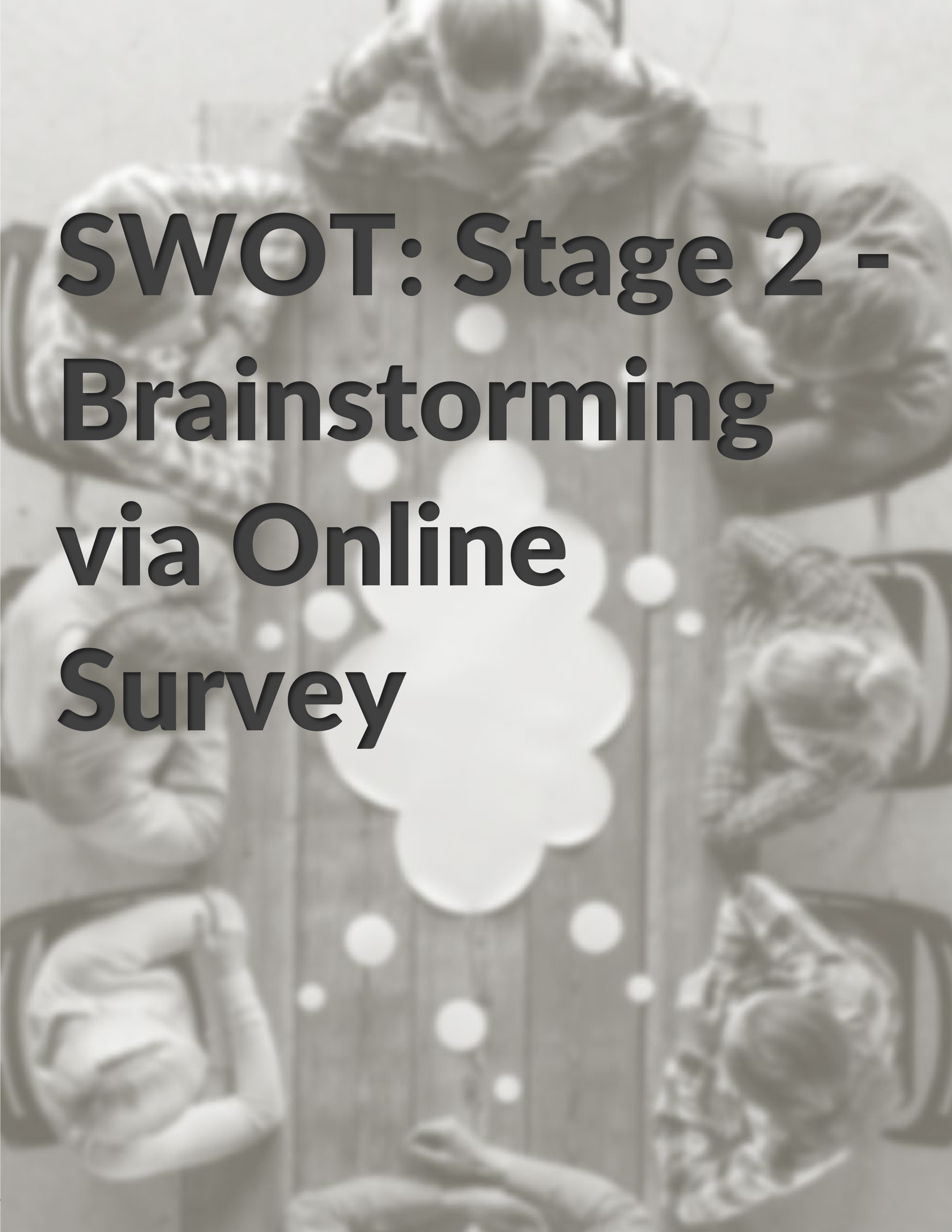
Step 2 of this stage can take longer. Therefore, to complete this stage you will likely need to devote **1-2 hours** of concerted time to accomplish all of the planning tasks.

Who is Involved

This stage involves the **facilitator**(s)

and the project or organization **manager** working together to develop the SWOT analysis question.

SWOT: Stage 2 - Brainstorming via Online Survey



Traditionally, to conduct an in-person SWOT analysis you would gather all of your stakeholders who agreed to participate in a room and generate ideas to your SWOT questions as part of a brainstorming. During this brainstorming meeting, participants typically write down ideas on large post-it notes that can be displayed on a wall.

In a remote setting, you could do a similar process where participants type ideas into the chat area or take turns verbally providing ideas that one of the facilitators captures in writing. However, this approach can feel stilted in a remote setting and is more **time-consuming** than in an in-person setting. In addition, each stage of a SWOT takes more time in a remote setting. For example, a group of 8-10 participants could take up to 2 hours to complete the brainstorming if you try to do it via a live remote setting (you can add about 30-60 minutes more for each additional 10 participants). The reason it takes more time for this method in a remote setting is because instead of everyone simultaneously writing down their ideas quietly, each participant has to take a turn and the facilitator needs to keep going around the virtual room to ensure all ideas are captured.

Brainstorming via an Online Survey

A way to facilitate the brainstorming part of a remote SWOT analysis is to utilize a **survey** that is sent to all the stakeholders. It's recommended you allow stakeholders a week to complete the brainstorming survey.

Following are the steps for conducting a Brainstorming survey. These steps can be used for any type of brainstorming you might want to do remotely – they are not strictly applicable to a remote SWOT analysis.

Step 1

The first step to do at this stage is to **draft your survey questions** that you will use to build your online survey. It's easiest to finalize the survey language and questions in a Word document and use it to build an online survey.

Following the best practices for creating surveys, here is an outline of a basic structure for your brainstorming survey:

- Introductory section/page that explains purpose of the survey
- Outline the stages of the process and indicate where the survey respondents are in the process
- Explain what is encompassed in the process, project, or organization for which you are conducting the SWOT analysis – for example for the annual data collection process we had it include the prep work all the way through to the data dashboard creation
- If you have data in the form of tables and graphs that would help inform survey respondents, you should include them in the survey before respondents get to the 4 SWOT questions
- Have a **separate page** for each of 4 SWOT questions
- A *Thank You* page that also lets respondents know their answers have been submitted to the system

Example of how you might want to write one of your 4 SWOT questions for your brainstorming survey

Below we would like for you to provide at least 2 answers to the following question:

What are some of the STRENGTHS of NEDARC's internal Annual Data Collection system/process? *Please note that Strengths usually are INTERNAL to the system or process:*

- What do we do well?
- What relevant internal resources do we have?
- What do other people see as our strengths?

When you write your strengths, please use a noun and verb and be as brief as possible.

Strength #1
Please use a noun and verb and be as brief as possible
____

Strength #2

Strength #2
Please use a noun and verb and be as brief as possible
____

Strength #3
Please use a noun and verb and be as brief as possible
____

Strength #4
Please use a noun and verb and be as brief as possible
____

Step 2

Now that you have your survey language and questions finalized, it's time to build it in an online format. After the survey is built, the next important step is to **test** the survey **internally** to make sure it functions correctly before sending out to stakeholders who will be participating in the SWOT analysis.

As part of that testing, you will want to export the test responses to make sure you will be able to capture results from stakeholders. After your export, don't forget to delete the test responses in the system before sending to participating stakeholders.

Step 3

The next step is to email an invitation with the survey link to the stakeholders who will be participating. To ensure everyone has a chance to complete the survey without drawing out the process, **a week is a good amount of time**.

2-3 days after the invitation is sent, you will want to do a follow up email to **ALL** participating stakeholders thanking those who have completed the survey and reminding those who haven't to please complete by the deadline.

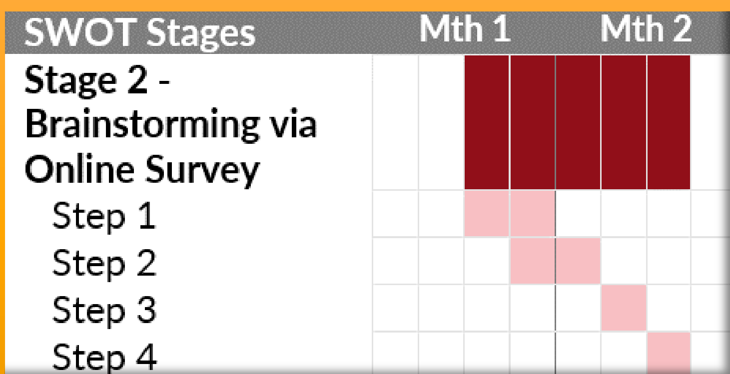
Step 4

After the survey deadline has passed, you can download the responses. There is no analysis that needs to be done with the ideas. However, **EVERY idea** that is submitted must be recognized and available for review during the SWOT: Stages 3-6 - Four Facilitated Live Remote Meetings. Go to How to Conduct Affinity Diagramming Remotely to see the next steps for the remote process.

Stage 2 Estimated Time Commitment and Who is Involved

Time Commitment

You should plan on about **5 weeks** to complete all of the steps for this stage of the process. It will take about that long to allow for the development of survey questions, building and testing the survey, for stakeholders to complete the survey, and for you to download and transcribe all of the brainstorming ideas. To help with planning, you should allot about 1-2 hours of concerted time for the survey development and deployment. Participating stakeholders will likely take up to 30 minutes each to complete the survey if they are struggling to come up with ideas.



Stakeholders will likely take up to **30 minutes** to complete the brainstorming survey

Who is Involved

This stage involves the project or organization manager, whoever is building the online survey, and participating stakeholders who will need to complete the survey.

Project or Organization Manager

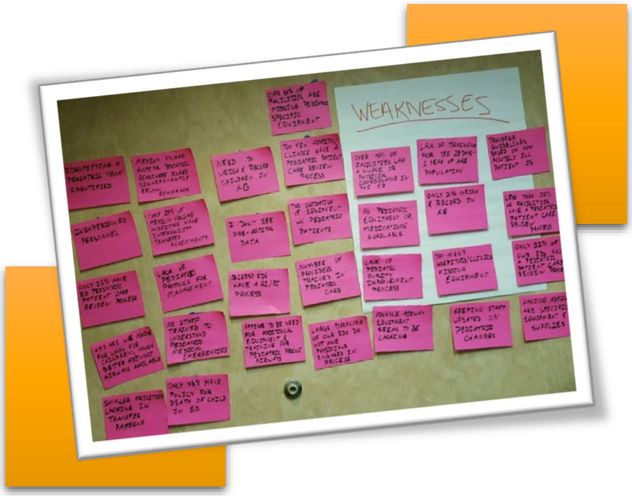
Whoever is building the online survey

Participating Stakeholders

SWOT: Stages 3-6 - Four Facilitated Live Remote Meetings

In the previous SWOT stage, we discussed how during an in-person SWOT brainstorming, ideas are written on some type of paper medium like large post-it notes and placed in a manner, often times a wall, where all participants can review the ideas.

Pictured below is an example of SWOT brainstorming ideas from an in-person SWOT analysis where this method was used.



After the brainstorming has been completed, the next steps of the SWOT analysis process for an **in-person** meeting involves the following:

- Starting with the Strengths; give participating stakeholders ~5 minutes to **SILENTLY** (no speaking allowed) review the ideas on the wall
- Ask the participants if any of the cards/ideas need clarification
- Once any ideas with questions have been clarified, participants can **SILENTLY** (no speaking allowed) organize the ideas for Strengths into similar groups. This is called affinity diagramming
- After the participants feel good about the affinity diagramming, they consensually develop titles/headers for each group
- Then complete all of the steps again each for Weaknesses, Opportunities, and Threats

While this method is easy to execute in an **in-person** meeting, it is not feasible in a remote setting. Below are the methods NEDARC staff developed that would simulate the ones listed above, would work in a remote setting, and use programs that participants had access to and are familiar with.

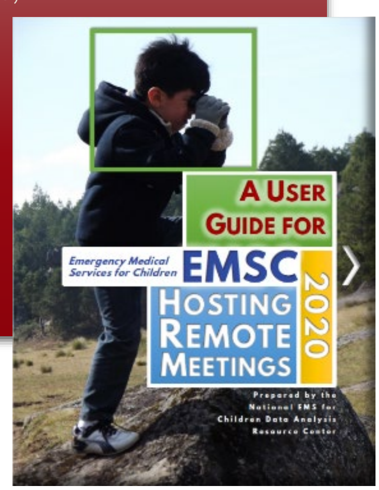
How to Conduct Affinity Diagramming Remotely

"*An affinity diagram is the organization of ideas into a natural or common relationship. For example, bananas, apples, and oranges would be grouped as fruits, while green beans, broccoli, and carrots would be grouped as vegetables. Affinity diagrams aid teams in tapping into their creativity and gut instincts*."

Step 1

Before you can conduct an affinity diagramming with your participating stakeholders, you will need to decide which tools to use and to transcribe each brainstorming idea onto virtual cards. The tools we choose to use for our remote affinity diagramming were **PowerPoint** and **Teams**.

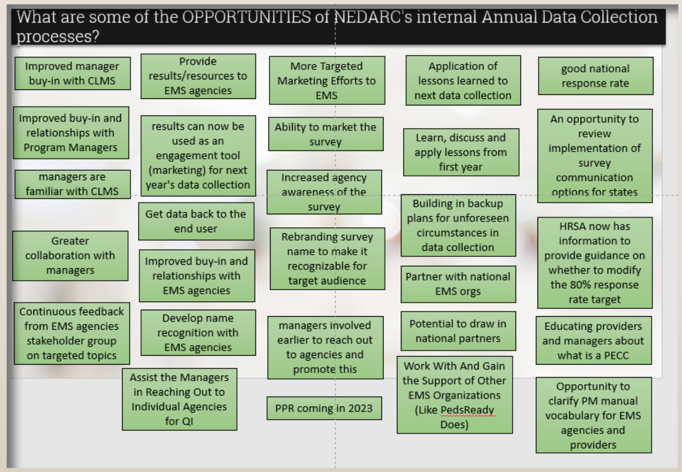
The NEDARC resource, A User Guide for Hosting Remote Meetings has a section devoted to how to choose the right platform(s) for your remote meetings.

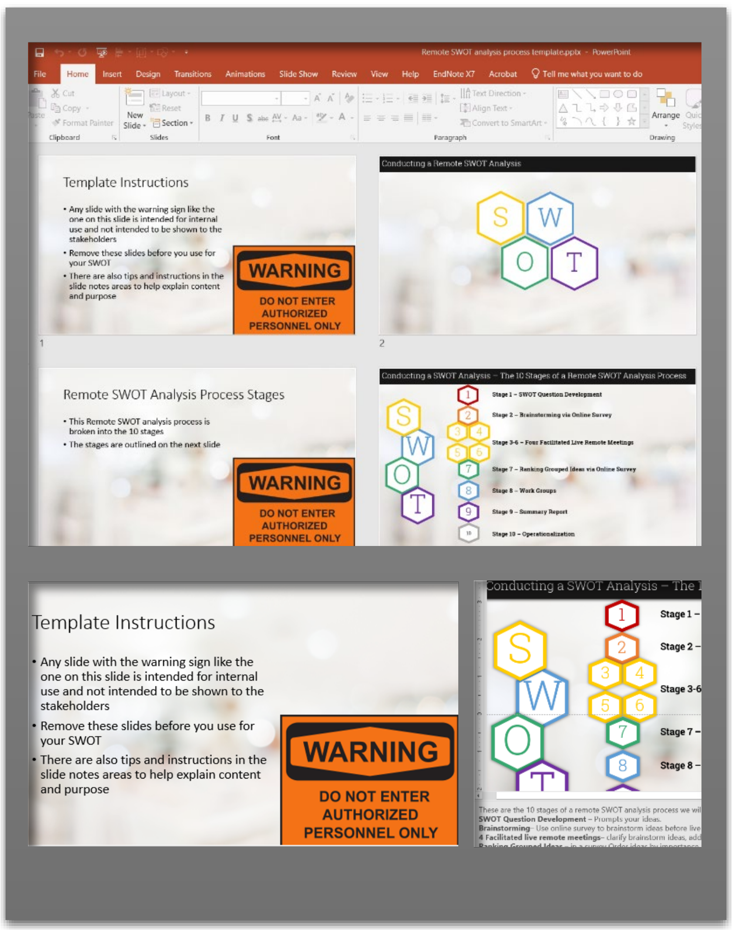


We decided to use PowerPoint for our remote SWOT analysis because nearly everyone is familiar with how to edit slides and you can draw and color shapes to represent **virtual cards**. We created virtual cards for each brainstorming idea. For example, if you have 20 ideas provided for Strengths from the survey conducted in [Brainstorming via an Online Survey](), you would draw 20 virtual cards.

The brainstorming ideas can be copied and pasted onto the virtual cards, with **one idea per** virtual card. All of the Strengths brainstorming ideas should be on one slide, using a similar method for the ideas associated with Weaknesses, Opportunities, and Threats. Try not to make your virtual cards too small if it appears they won't fit on a single slide. Instead if you don't have enough room in the slide area, you can put the overflow of virtual cards in the grey area around the slide.

PowerPoint Virtual Card Example



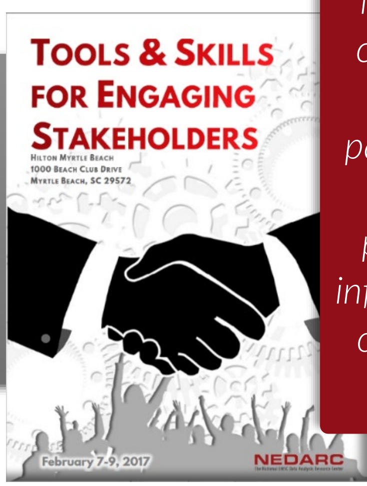


We created the [Remote SWOT Analysis Process PowerPoint Template]() – which you can download from our website – for conducting your own remote affinity diagramming. The instructions, slide descriptions, and some talking points are located in the slide's notes areas of this template.

Pro Tip: As your participating stakeholders complete the brainstorming survey, transcribe their ideas to the virtual cards in the PowerPoint template. Transcribing as the responses are submitted will facilitate this stage of the process because you cannot conduct the live facilitated remote meetings until you have **ALL** of the brainstorming ideas transcribed onto the virtual cards.

For conducting the live remote meetings, we chose Teams because all of the participants were internal to the NEDARC team and all staff had access to the program. However, any remote meeting app that has **screen sharing** and **remote access capabilities** would work including but not limited to Zoom, Adobe Connect, and Skype. Screen sharing is important so the facilitator can share the PowerPoint document that has all of the brainstorming ideas already copied to virtual cards. The remote access is important so the facilitator can let each participant take control of the screen to complete their turn of the affinity diagramming by moving similar ideas captured on the virtual cards together into discrete groups.

The NEDARC resource, Tools & Skills for Engaging Stakeholders workshop manual covers some facilitation methods and tools.



Silence for several steps in the process is important to create a level field for all participants so no strong personalities influence others or try to take over.

Step 2

While you may think you could complete the affinity diagramming of all brainstorming ideas generated for the SWOT in one remote meeting, this is a **bad idea**. If you have 8-10 participants, it will take you 1-2 hours to complete the affinity diagramming for just the Strengths. Thus, to complete the affinity diagramming for all four components of a SWOT, it will take 8+ hours of a live remote meeting. Instead, to reduce cognitive burden for participating stakeholders and make it easier to schedule, we suggest you schedule four different 2-hour remote meetings – one for each component of a SWOT.

At the beginning of each of the four live meetings, review the slide with the goal and the SWOT topic for the day (see the Remote SWOT Analysis Process PowerPoint Template discussed in Step 1).

Step 3

Go to next slide in the Remote SWOT Analysis Process PowerPoint Template with the associated SWOT topic for the day (Strengths, Weaknesses, Opportunities, or Threats). Exit the presentation mode and view the slide in the outline format so all virtual cards are visible on the screen. Give participants several minutes to **SILENTLY** (no speaking allowed) review the ideas on the slide. For example, in the first live remote meeting, go to the slide with all of the Strengths ideas and let participants have time to read through all of the ideas.

Silence for this step is important to create a level field for all participants so no strong personalities influence others or try to take over. By leveling the field, your more reserved participants will feel empowered and stay engaged in this process.

Step 4

Once participants have had a chance to review all of the ideas, ask them if there are any **NEW** ideas they want to add. As new ideas are generated, the facilitator will need to add them to virtual cards. Remember one idea per card and containing a noun and a verb. In the Additional Resources section of this stage you will find an outline for a facilitator covering the facilitation steps for during the live remote meetings, talking points, estimates for times, and ideas of what to say at each step.

Step 5

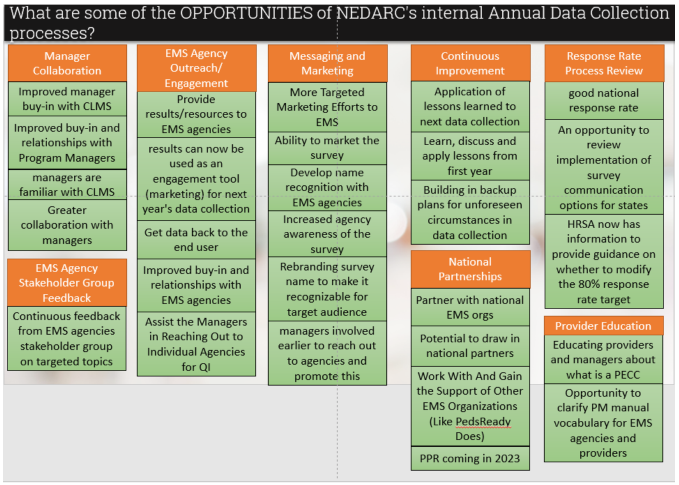
It is important to make sure all participants attending the live remote meeting understand the ideas on the virtual cards before moving on to the actual affinity diagramming. Hence after adding any new ideas, the facilitator gives participants the opportunity to ask about any ideas on the screen that they want clarification. While the person giving clarification on the idea does **not** need to be the one who submitted the idea, the group must agree on what the idea means. The facilitator can change the wording on the virtual card if all participants indicate agreement.

Step 6

Now the group is ready to start the affinity diagramming. During this step, each participant has the chance to group similar ideas by moving the virtual cards around. This step is also done in **SILENCE**. Silence is important to create a level field for all participants so no strong personalities influence others or try to take over. By leveling the field, your more reserved participants will feel empowered and stay engaged in this process. The facilitator goes around the participants until everyone has had a chance. Once the last person has had their turn grouping ideas, the facilitator needs to ask the participants if there is anyone who wants to move ideas again. Moving ideas into similar groups continues until no more participants say they want to move ideas.

Step 7

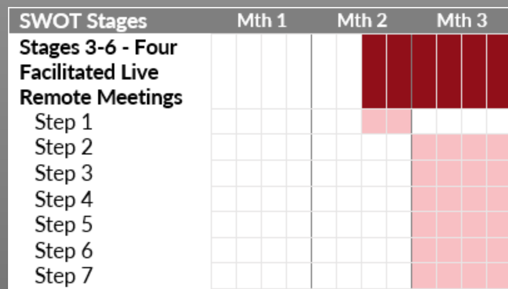
After ideas are assembled into discrete groups, participants work together to develop titles or headers for each group of ideas. When creating titles or headers, consider using a clear phrase or name for each group of ideas. Also, consider using a virtual card that is a different color than the ones used for capturing all of the brainstorming ideas.



You have now completed affinity diagramming. Steps 2-7 in this section should be completed for each of the four parts of the SWOT (Strengths, Weakness, Opportunities, and Threats).

Stages 3-6 Estimated Time Commitment and Who is Involved

Time Commitment



Total concerted *time to complete these four stages for a group of up to eight participants is 14-20 hours*

Pre-meeting: the facilitator and/or project manager should plan on spending up to 15 minutes per survey respondent transcribing each brainstorming idea onto a virtual card. For example, if you have 4 respondents that would equate to approximately 1 hour of transcribing their ideas into the PowerPoint template (see the Remote SWOT Analysis Process PowerPoint Template discussed in Step 1).

Meeting: We suggest that you conduct 4 meetings that are about 1.5-2 hours in length for each part of the SWOT. This equates to ~8 hours. This time allotment is based on a meeting of up to 10 participants. If there are more than 10 participants, add an additional 40 minutes for every 10 participants. To ensure the process was cognitively easier on the participants, we divided this part of the process into four live meetings for the remote SWOT analysis. While not all of the staff were able to attend all of the live meetings, the majority did.

We choose 4 meetings because if we found that our process was not working, it would have been hard to adjust on the fly and continue to make it a useful meeting for participants if we had made it one 8-hour meeting. You may find after the first meeting that you will want to adjust timing or processes for the next 3 live meetings.

Post-meeting: The facilitator and/or project manager will need to clean up the slide content at the end of each live meeting. This can take up to 30 minutes at the end of each of the 4 live meetings depending on their PowerPoint skills.

Who is Involved

Pre-meeting: This stage involves the facilitator and/or project manager

Meeting: This will involve the facilitator, project manager, and all of the participating stakeholders who are available

Post-meeting: This stage involves the facilitator and/or project manager.

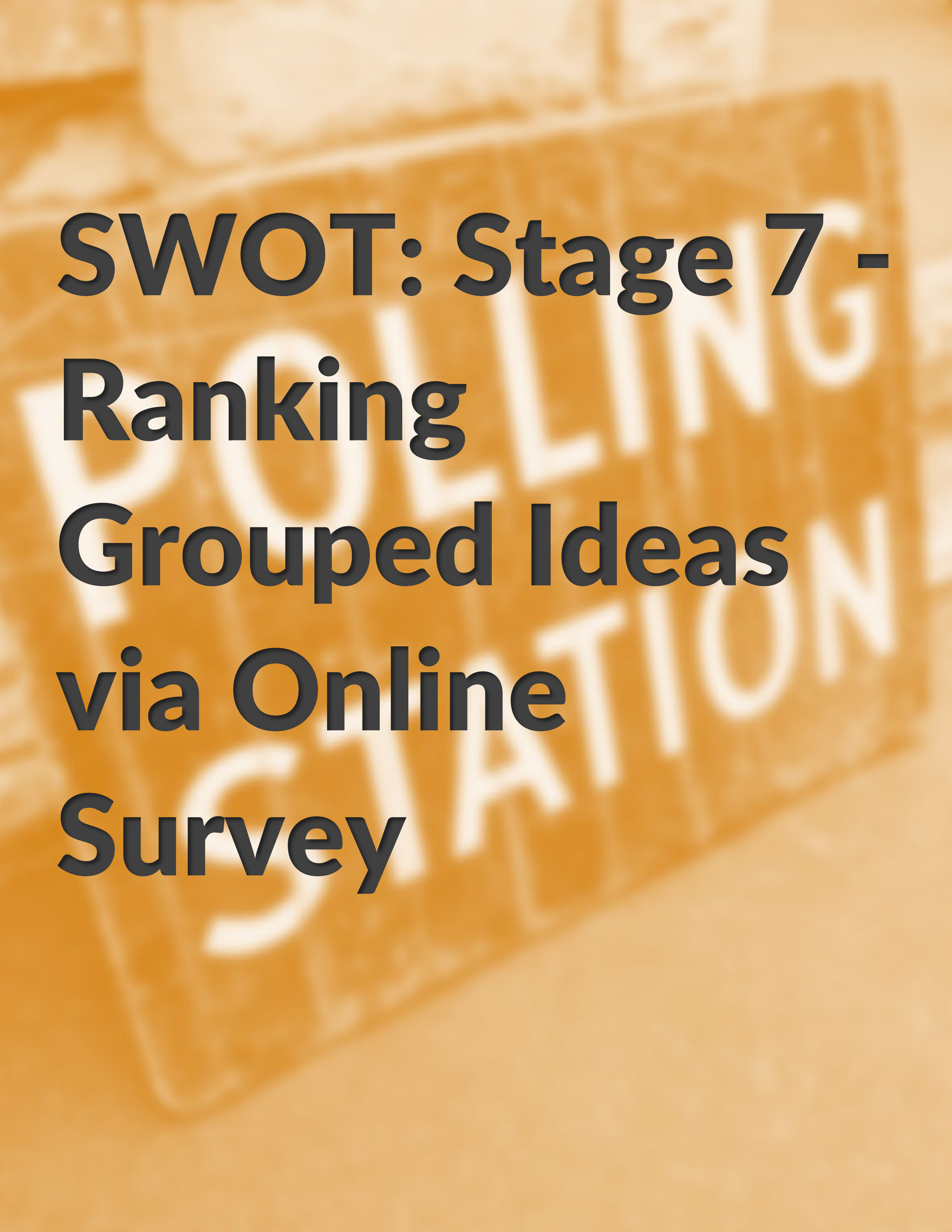
Additional Resources

We have two video resources related to advanced PowerPoint skills and a facilitation outline to help you prepare and host your four live remote meetings for this stage. Click on a video below to view it on the [NEDARC YouTube Channel](#).

Facilitator's Outline for Live Facilitated Meetings

1. Thank yous to those attending
2. In PowerPoint template discussed in Stages 3-6 Step 1, go to slide with the daily goal. The instructions, slide descriptions, and some talking points are in the notes areas of the slides in this template
3. Go to next slide in the template with the correct SWOT topic for the day (Strengths, Weaknesses, Opportunities, or Threats)
4. Review ideas from brainstorming survey: Give participants a few minutes to **SILENTLY** review the ideas on the slide.
   a. Check in at 2 minutes of quiet review to see if anyone needs more time
   b. If applicable, check in at 5 min to see if need more time
   c. Move on to next step **ONLY** if everyone is in agreement that they are done reviewing the ideas
   d. Ask participants *Are we ok with moving on to the next step of the process?*
5. Adding **NEW** brainstorming ideas: Ask the participants *After reviewing all of the ideas, are there any NEW ones you want to add? Remember we only want new ideas that have not already been identified and each new idea must have a noun and a verb.*
   a. Keep asking until no more new ideas are provided
   b. Ask participants *Are we ok with moving on to the next step of the process?*
6. Clarifying brainstorming ideas: Ask the participants *Are there any ideas up here you want clarification on?*
   a. The person giving clarification on the idea does not need to be the one who submitted the idea
   b. You can change idea wording IF the **ALL** of the participants are in agreement – need to check in with them
   c. Ask participants *Are we ok with moving on to the next step of the process?*
7. Affinity Diagramming: Explain to participants *Now we are going to group like ideas*
   a. Share the instructions for this part of the process:
      Each person is going to have a chance to group the ideas you see on this screen. This activity is done in silence so no talking. I will remind you of this rule if anyone starts talking. We will start with (however you want to start such as alphabetically).
      If the facilitator is also a participant, we found it useful for her/him to have already grouped the ideas. It saves time and reduces the cognitive burden of the other participants. If that is the case, here is a suggestion of what you can say next: *Andrea has already grouped the ideas and now we will start with XX. When you are ready, please use the request control of the screen so I can give it to you. When you are done grouping the ideas, let me know and can release your control over the screen.*
   b. Once last person has had their turn grouping ideas ask the participants: *Is there anyone who wants to move any ideas?*
   c. Keep checking in to see if someone wants to move any ideas until everyone seems fine with how they end up
   d. Verify with everyone that they are fine with the current groupings
   e. Ask participants *Are we ok with moving on to the next step of the process?*
8. Titles/headers: Explain to participants *Now we are going to develop titles or headers for each group*
   a. Check to see if there is any one group they want to start with first
   b. Ask the participants *What do we want to call this group?* If something is suggested, check back with the participants that they are ok with what was suggested
   c. Repeat 8.a. – 8.b until all of the groups have a title
9. Thank participants and let them know what the next steps will be

SWOT: Stage 7 - Ranking Grouped Ideas via Online Survey



In the previous SWOT stage, participating stakeholders reviewed all brainstormed ideas, clarified and added more ideas as needed, organized the ideas into similar groups (affinity diagramming), and added titles/headers to the final groups. Participants completed this stage independently for Strengths, Weaknesses, Opportunities, and Threats.

The next steps of the SWOT analysis process for an **in-person** meeting involve the following:

- Participants independently rank grouped ideas based on their **importance** for Strengths, Weaknesses, Opportunities, and Threats
- Participants independently rank grouped ideas based on their **feasibility** for Strengths, Weaknesses, Opportunities, and Threats

After rankings have been completed, the facilitator assists participants at **in-person** meetings to summarize the rankings for importance and feasibility. The ranked grouped ideas can be graphed to understand how importance and feasibility intersect and how they relate to other grouped ideas. These rank results will be used to inform the Stage 8- Work Groups.

It is important to acknowledge to participants that the purpose of ranking is to prioritize the ideas that were generated. It is not to say 'this' idea is better than 'that' idea.

While this method is relatively easy to execute for an in-person meeting, it is **not feasible** in a remote setting. Below are the methods we developed that would simulate the ones listed above and work in a remote setting.

How to Rank Grouped Ideas Remotely (Online Survey)

A way to remotely rank all grouped ideas is to utilize a survey that is sent to all the participating stakeholders. Similar to the [brainstorming survey](), it's best to give the stakeholders a week to complete the ranking survey.

Following are the steps for conducting a ranking survey. These steps can be used for any type of ranking of brainstorming ideas you might want to do remotely – they are not strictly for a SWOT analysis.

It is important to acknowledge to participants that the **purpose** of ranking is to **prioritize** the ideas that were generated. It is not to say 'this' idea is better than 'that' idea.

Step 1

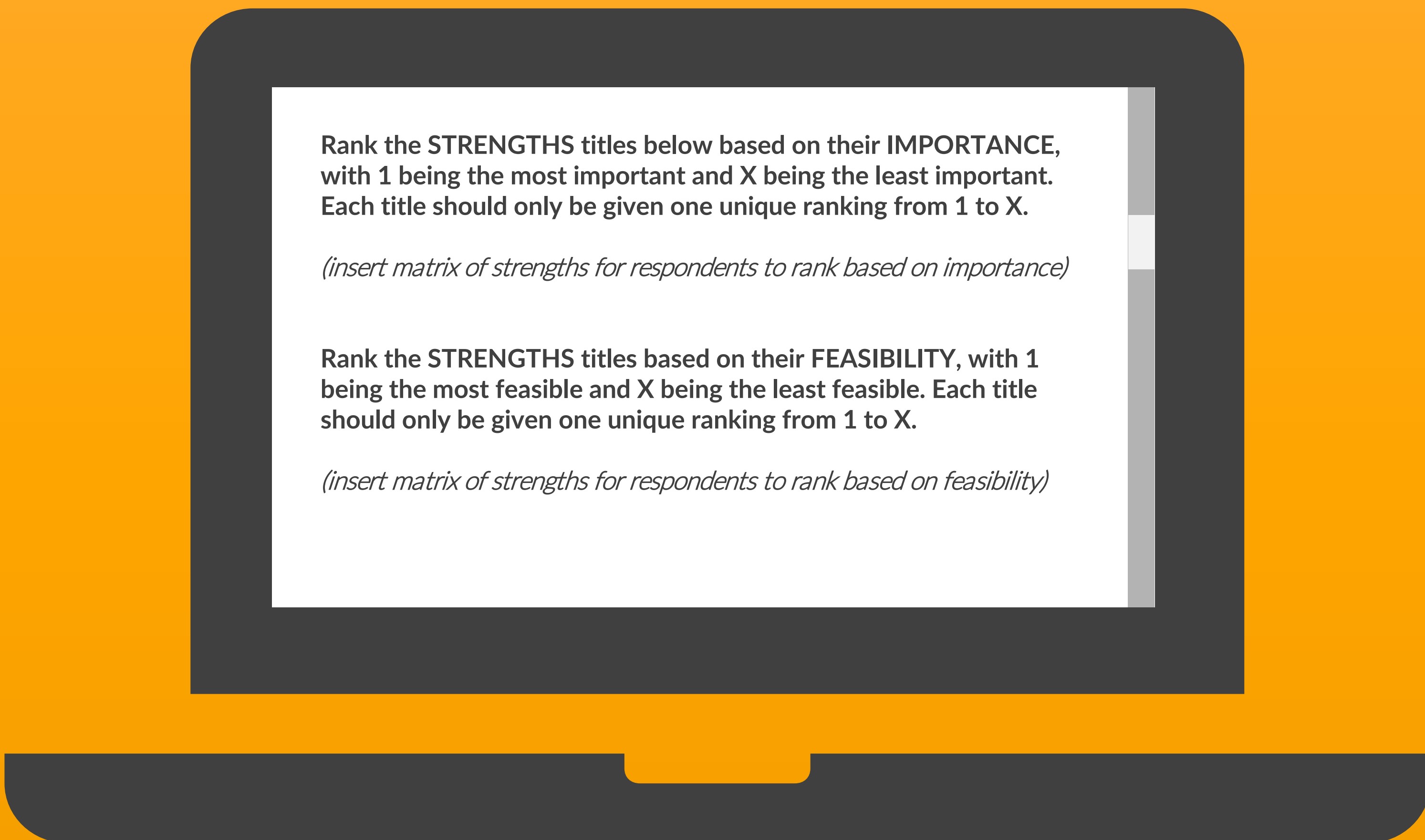
The first step to do at this stage is to draft your survey that you will use to build your online survey to be sent to the participating stakeholders.

Similar to the brainstorming survey, It will be easier to first draft your survey and finalize the language in a Word document. Once that is completed, you will be ready to start building your online survey that will be sent to participants.

Following the best practices for creating surveys, here is an outline of a basic structure:

- Introductory section/page that explains the purpose of the survey
- Outline the stages of the process and indicate where they are in the process
- Have a separate page for each of 8 SWOT ranking questions (ex: 2 for Strengths) for both importance and feasibility
- Each ranking question can be organized as a matrix for ease of completion depending on survey software capability
- A Thank you page that also lets the respondent know their answers have been submitted to the system

While the example below demonstrates the question for a *Strengths*, the same structure could be used for Weaknesses, Opportunities, and Threats



Note: in this example, an X represents the total number of groups identified for each component of the SWOT. For example, if you had 4 groups for Strengths, then you would enter 4 in place of the X.

Step 2

Now that you have your survey language and questions finalized, it's time to build it in an online app. After the survey is built, the next important step is to test the survey internally to make sure it functions correctly before sending out to stakeholders who will be participating in the SWOT analysis.

As part of that testing, you will want to export the test responses to make sure you will be able to analyze results from respondents. After testing the export, don't forget to delete the test responses in the system before sending the survey to participating stakeholders.

Step 3

The next step is to email an invitation with the survey link to the stakeholders who are participating in your SWOT analysis. To ensure everyone has a chance to complete the survey without drawing out the process, a week is a good amount of time.

2-3 days after the invitation is sent, you will want to do a follow up email to **ALL** participating stakeholders thanking those who have completed the survey and reminding those who haven't to please complete by the deadline.

Step 4

Download the responses to the survey after it has closed.

First, you will need to sum the responses for each title/header for importance and for feasibility. Then you will average the ranking scores for each title/header for both importance and feasibility.

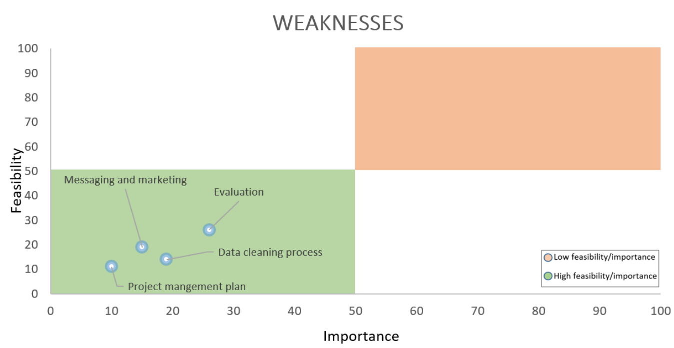
Assuming the number 1 was used by stakeholders to indicate the most important/feasible ideas during ranking.... When listing the results in a table, sort from smallest to largest number for the Average Cumulative Ranking to **reduce** stakeholder **cognitive burden** when viewing the results.

Step 5

After you complete your analysis, you will need to summarize the results for participants. The easiest way to show the ranking results is to graph them based on importance and feasibility. The results should be displayed in four graphs – one for each letter of the SWOT – with the feasibility results on one axis and the importance results on the other axis. Ready-made graphs where you can insert your results are available in the Remote SWOT Analysis Process PowerPoint Template (see the Remote SWOT Analysis Process PowerPoint Template discussed in [Step 1](#)).

Because 1 was used in rankings to indicate the most important and/or feasible group, those groups that fall in the bottom left-hand quadrant of the graph indicate the highest priority ideas to start with. Conversely, those groups that fall in the upper right-hand quadrant of the graph are uniformly considered by the participating stakeholders to be the least important and least feasible.

Here is an example of Weaknesses graphed for feasibility (Y-axis) and importance (X-axis) and compared against other grouped ideas.



This example shows that participants ranked the project management plan as the most important and feasible grouped idea.

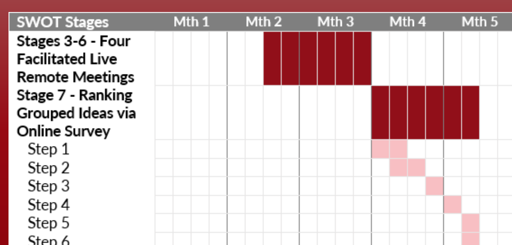
Step 6

Now you are ready to look at your top 2-3 ranked grouped ideas for Strengths, Weaknesses, Opportunities, and Threats. Usually, graphing the results will help you easily determine which are your top groups to prioritize. However, if there is no strong consensus among participants, you might end up with all of your groups in one of the graph quadrants (See example in Step 5). In these types of situations where there is little numerical difference, it can be hard to determine which groups are your top priorities. When that happens, you can use the Average Cumulative Ranking score to identify the most important and feasible grouped ideas.

These ranking results will be used to inform the next stage, Stage 8 - Work Groups.

Stage 7 Estimated Time Commitment and Who is Involved

Time Commitment



Steps 1-3: The facilitator and project manager should plan on spending between 2-3 concerted hours creating, testing, and launching the ranking survey.

Steps 4-5: Plan on spending 2-3 concerted hours to complete the download and analysis.

Step 6: The facilitator and project manager should plan on spending approximately 2 hours reviewing the results to identify top grouped ideas and next steps.

Total concerted *time to complete this stage for a group of up to eight participants is 9-11 hours.*

Who is Involved

Steps 1-3:

Facilitator

Project Manager

Participating Stakeholders

Steps 4-5:

Facilitator

Project Manager

Step 6:

Facilitator

Project Manager

SWOT: Stage 8 - Work Groups

Stage 8 - Work Groups for a remote SWOT is similar to an in-person SWOT analysis. The only difference is meeting remotely instead of face-to-face. You will still need to find dates and times that work for everyone in the work group. The focus for the work group is the same as the in-person – to develop a goal for each of the top priorities along with objectives and action items for each objective.

Note: This is a critical part of the SWOT and a place where groups often lose momentum after the work in the previous stages.

How to Break into Work Groups and Develop Goals for Remote Work

Step 1

Before you can break participating stakeholders into work groups, you will first need to show the results of the top priorities based on the ranking results. An effective way to present these priorities is in a SWOT Matrix. Ready-made SWOT matrices are available in the Remote SWOT Analysis Process PowerPoint Template (see the Remote SWOT Analysis Process PowerPoint Template discussed in Step 1). Based on the ranking results you would list your top 1-2 grouped ideas for each Strengths, Weaknesses, Opportunities, and Threats.

Step 2

The SWOT Matrix makes it easy for stakeholders to quickly understand the top priorities. At this point, you will want to set up a remote meeting to review the priorities with stakeholders and decide on work groups.

Depending on your needs, you can do preliminary work group assignments or you can wait until the live remote meeting to determine work group assignments. If you decide to do preliminary work group assignments, it is important to give stakeholders the chance to voice their opinions. **Consensus is important.** You don't want to end up with a work group that is disengaged or hostile about not having a voice.

Make sure to give each work group a copy of the Remote SWOT Analysis Process PowerPoint template to use for writing their goal, objectives, and action items.

The last thing to do as part of this step is to determine a deadline for all work groups to finish the goal, objectives, and action items.

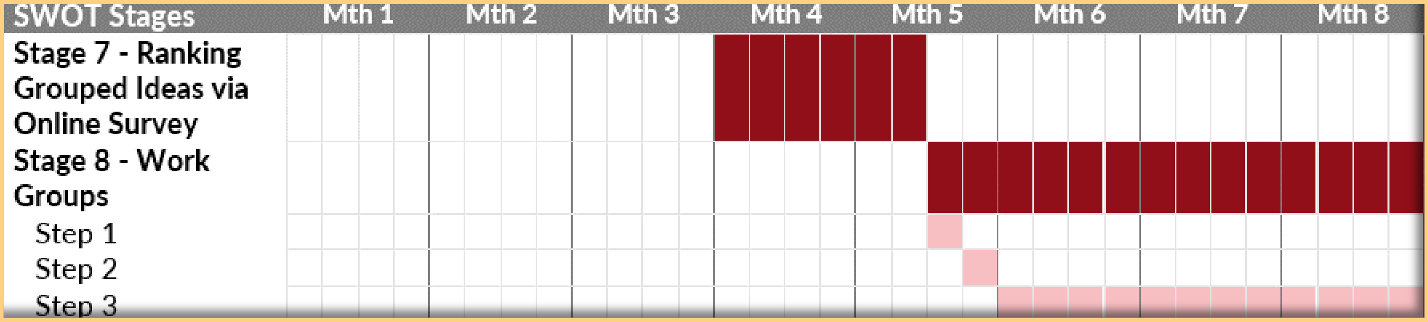
Step 3

Now that you have consensus for work group assignments, it becomes the work groups' responsibility to meet and complete the goal, objectives, and action items for their assigned priority before the deadline.

- Each work group will need to review all of the brainstorming ideas that were grouped with the priority they are working on. These are the results of Stages 3-6 - Four Facilitated Live Remote Meetings.
- Each work group will need to independently set up remote meetings to develop a goal, objectives, and action items for their assigned priority. The work group goal, objectives, and action items table is available in the Remote SWOT Analysis Process PowerPoint Template.
- How many times should work groups meet? The answer is until they have completed the goal, objectives, and at least two action items for each objective.
- Each work group needs to complete their assignment by an agreed-upon deadline.
- Each work group will report back to the larger participating stakeholder group.

Stage 8 Estimated Time Commitment and Who is Involved

Time Commitment



Steps 1-2: These steps will take about 1.5 hours. Approximately 30 minutes to prepare the results for presenting to the stakeholders and then an additional hour for the live remote meeting to discuss results and determine work group assignments.

Step 3: This step can take from 1-5 hours per work group per meeting on average depending on the general consensus of the work group on completing the goal, objectives, and action items.

Total concerted *time to complete this stage for a group of up to eight participants with 4-5 priorities is 11-15 hours.*

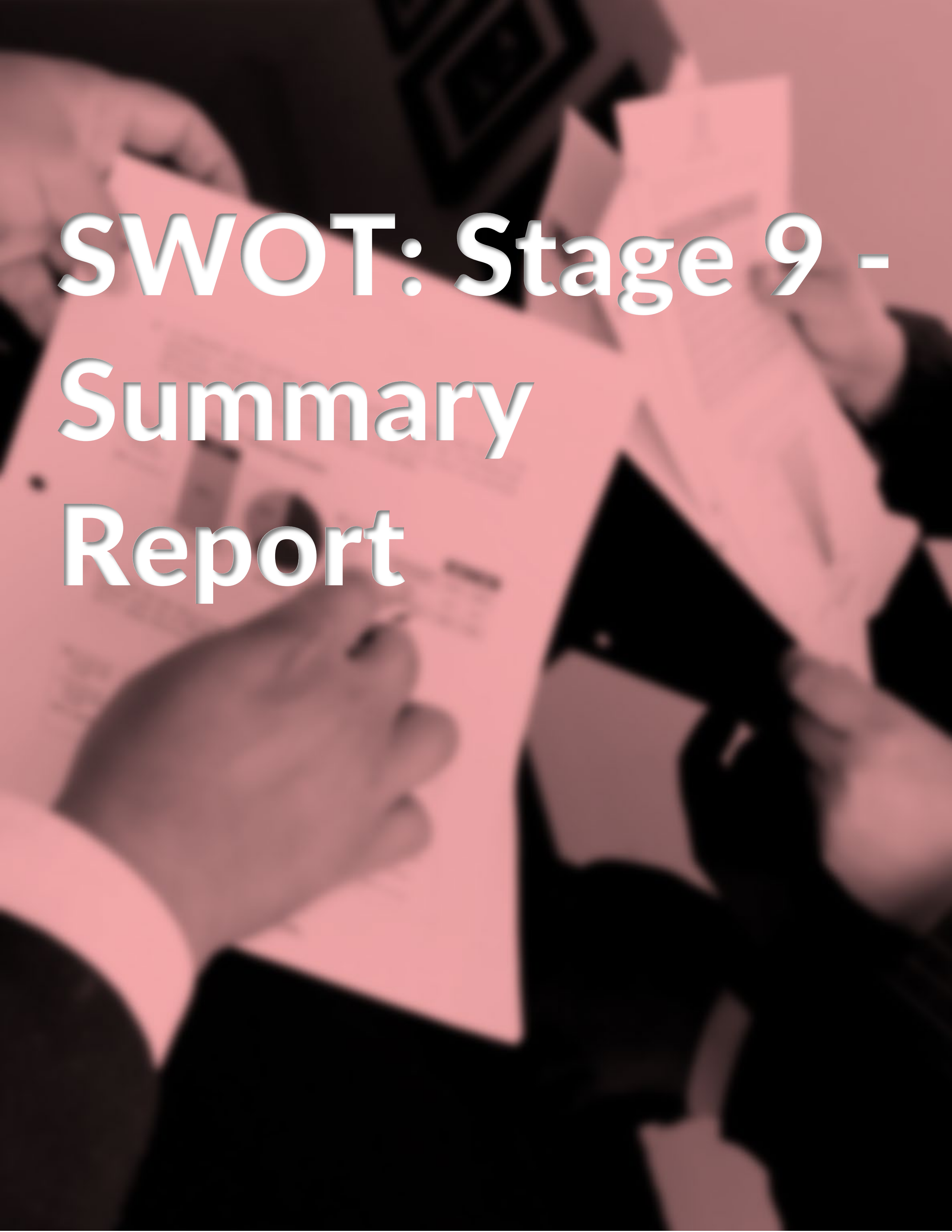
Who is Involved

Pre-meeting: This part of the stage involves the facilitator and project manager.

Meeting to Discuss Results and Determine Work Group Assignments: This part of the stage will involve the facilitator and all of the available stakeholders.

Work Group Meetings: This part of the stage involves the stakeholders for each work group.

SWOT: Stage 9 - Summary Report



After you have completed Remote SWOT Stages 1-8, it's time to turn the work from your SWOT analysis into a report that summarizes all of the results.

The first task to complete is to gather and compile all of the work group goals, objectives, and action items from the highest priority to the lowest. Each work group should have completed their work in a copy of the Remote SWOT Analysis Process PowerPoint Template (see the Remote SWOT Analysis Process PowerPoint Template discussed in Step 1).

At this point, all of the work and results for each stage of the remote SWOT analysis should be located in the PowerPoint template and can be transcribed to a report that can be shared with **ALL stakeholders** – not just those that participated in your SWOT. NEDARC staff created a Remote SWOT Analysis Report Template in Word you can download from our website and use for your Remote SWOT Analysis summary report.

The report template is editable for your needs with boilerplate content to expedite the creation of a report. Areas to insert your content and results are indicated with a yellow highlight. The Table of Contents can easily be updated after you complete the report as it was set up using the built-in auto table function available in Word. The report template includes comments throughout the document to help with instructions about each section of the report such as how to update the table of contents and the list of stakeholders. All of the fonts used in the report are standard ones found on all computers.

As part of the report finalization, we suggest you send your completed report to an internal person for review of the boilerplate content. The results from each stage of the SWOT process should be **transcribed exactly** as they were provided and generated by the participant stakeholders. Don't let the reviewer change any wording provided by and transcribed from the participating stakeholders. For example, ALL of the brainstorming ideas should be listed individually, unedited, and included in the report. Remember, the purpose of a SWOT analysis is to come to a decision or strategy based on consensus for buy-in from stakeholders. Therefore, transparency is important.

When you are ready to share the final report with stakeholders, it's best to share it as a PDF document.

Stage 9 Estimated Time Commitment and Who is Involved

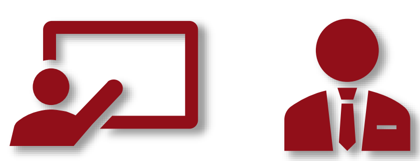
Time Commitment

SWOT Stages	Mth 1	Mth 2	Mth 3	Mth 4	Mth 5	Mth 6	Mth 7	Mth 8	Mth 9
Stage 9 - Summary Report									

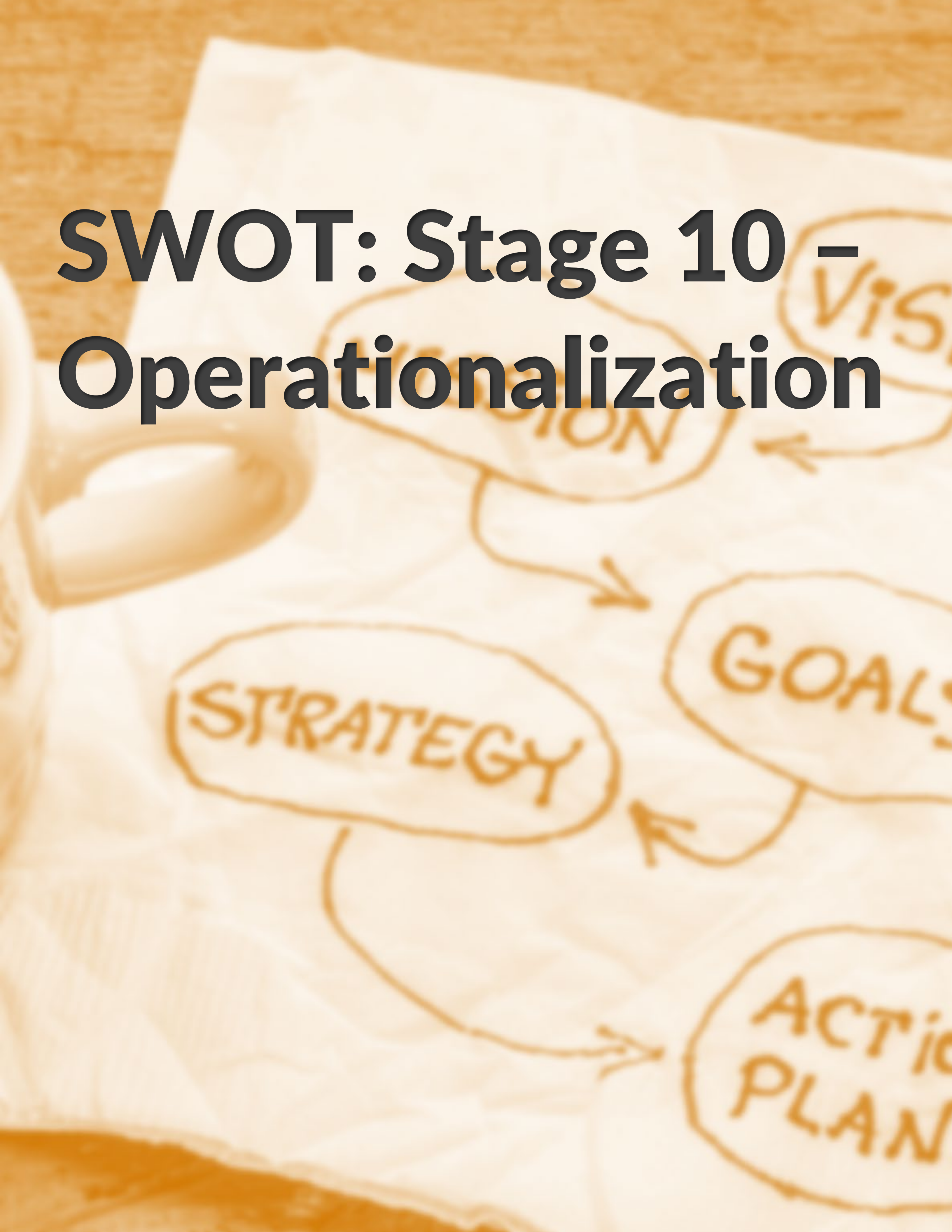
If you use the Remote SWOT Analysis Process PowerPoint Template (see the Remote SWOT Analysis Process PowerPoint Template discussed in Step 1) and the report template mentioned in the previous section, this stage should only take about 1-2 hours of **concerted** time.

Who is Involved

This stage involves the facilitator(s) and/or the project manager to work together to complete the report.



SWOT: Stage 10 – Operationalization



At this stage, you are actually finished with the SWOT Analysis process and ready to start **implementing** your consensus-based priorities to improve your process, project, or program. To strategically operationalize the results from your SWOT analysis you will want to create a Project Management Plan. Use the goals, objectives, and action items outlined by the work groups to make your project management plan. While not all of your brainstorm groups were identified as priorities during the SWOT: Stage 7 - Ranking Grouped Ideas via Online Survey, you should still review and consider incorporating them in your Project Management Plan.

Before you go, keep in mind that a **SWOT analysis is an evaluation tool**. Evaluation is an ongoing process improvement so you are never 100% complete and should consider revisiting and refining the process, project, or program you conducted your SWOT analysis on a regular schedule.

Stage 10 Estimated Time Commitment and Who is Involved

Time Commitment

If you follow all of the stages listed in this manual and have stayed within the timeframe allotted to each stage, you likely won't be able to **START** implementing and operationalizing your goals, objectives, and action items until at least 9.5 months after you started this process.

Operationalization will **not** be a quick task and will take months if not years to implement everything. As stated in the previous section, you have completed an evaluation by conducting a SWOT analysis and therefore you should consider regularly revisiting the results to make further improvements to your process, project, or program.

Who is Involved

This stage involves the project manager and stakeholders identified in the summary report to work together to operationalize the goals, objectives, and action items listed in the Stage 9 Summary Report.