

SWOT ANALYSIS

(Strengths- Weaknesses- Opportunities- Threats)

WORKBOOK

This workbook provides guidance needed to conduct an actionable SWOT analysis.

BY HEATHER GARLAND

W E L C O M E

Greetings!

This workbook is a tool to get your ideas flowing! Take a moment to reflect on your organization. Where do you stand today? Even more importantly, where do you want to go next? Consider what's driving you forward and what might be holding you back.

I'm a big fan of SWOT analyses because they're straightforward yet incredibly impactful. Often, we have a sense of what's influencing our business, but it's only when put it down—categorizing **s**trengths, **w**eaknesses, **o**pportunities, and **t**hreats—that we see the big picture and understand how these factors shape our direction.

What makes this approach so valuable is that it works equally well for a one-person operation or a larger team. It gives everyone involved a chance to contribute, sparking meaningful discussions and fresh perspectives.

I hope this serves as a strong starting point for creating real, lasting change in your company's future.

Heather Garland

ABOUT ME

I've been working in the financial and operations management of organizations for over 25 years. I have worked in numerous industries, including professional services, nonprofit, and public accounting. My passion is helping companies to reach their full potential!

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WHAT IS A SWOT ANALYSIS?

A SWOT analysis (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats) is a simple yet powerful tool to help you evaluate where your business stands today—and where it could go next. It gives you a clear view of what's working, what needs attention, where growth is possible, and what external challenges to prepare for.

Internal Factors

Strengths and weaknesses come from within your business. These influence how you operate and shape your ability to compete.

- Strengths are what give your business an edge—like a skilled team, strong customer loyalty, or advanced technology.
- Weaknesses are internal challenges that may hold you back—such as high costs, staff turnover, or outdated systems.

External Factors

Opportunities and threats come from outside your business. These are market conditions, trends, or changes that can impact your success.

- Opportunities are external openings for growth—like new technologies, strategic partnerships, or favorable market trends.
- Threats are outside risks—such as economic shifts, increasing competition, or changing customer expectations.

By taking time to complete a SWOT analysis, you'll gain valuable insights to help guide smarter decisions and set a stronger path forward.

WORKBOOK TASK #1

Before beginning the analysis, it's important to establish a clear starting point and identify key stakeholders and responsible parties.



01 What is your objective? Why do this SWOT analysis NOW?

02 Who are your organization's internal stakeholders? Their input should be included in the analysis.

03 Who will take responsibility for managing the various aspects of implementing the solutions?

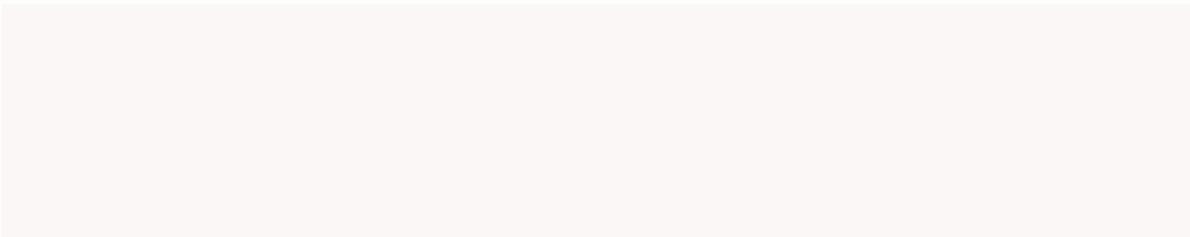
WORKBOOK TASK #2

Use this section to brainstorm your SWOT—focusing on technology, workforce, and services. Strengths and weaknesses are internal; opportunities and threats are external.

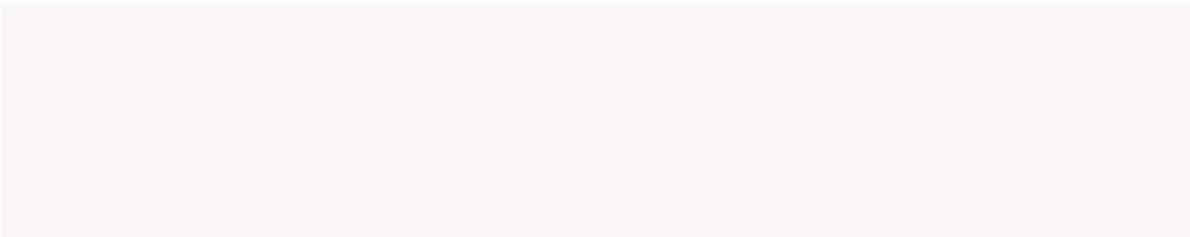
STRENGTHS



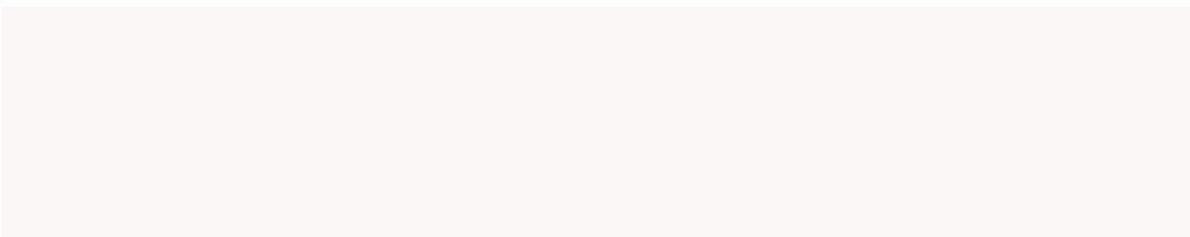
WEAKNESSES



OPPORTUNITIES



THREATS



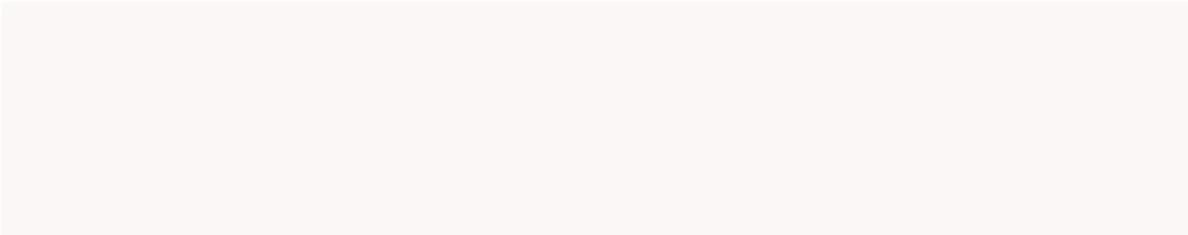
WORKBOOK TASK #3

What are your next steps? Identify a lead, set SMART goals, break big goals into smaller ones if needed, set deadlines, and define how you'll measure success.

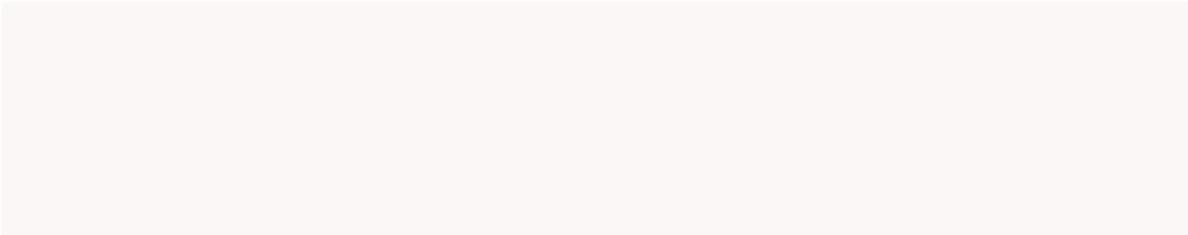
STRENGTHS ACTION ITEMS



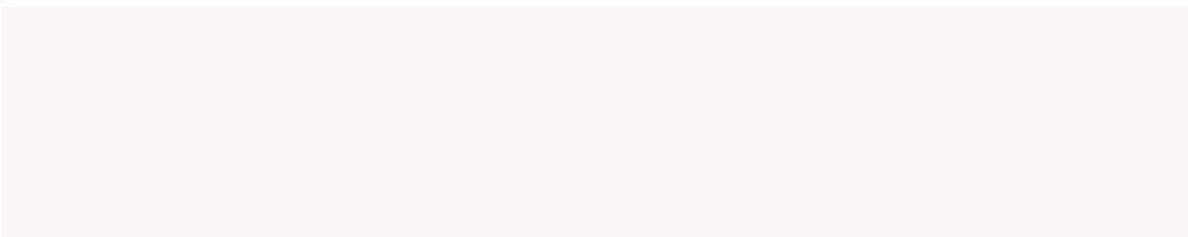
WEAKNESSES ACTION ITEMS



OPPORTUNITIES ACTION ITEMS



THREATS ACTION ITEMS





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Start your journey with confidence — click below and let us help you succeed!

**Schedule your free consultation
with us today!**