

For more information or to schedule a company assessment, please contact: The Productivity Institute via email at: info@prodinst.com

SITUATIONAL ANALYSIS ASSESSMENT OF YOUR ORGANIZATION

**This SWOT analysis focuses on:
Strengths (S), Weaknesses (W), Opportunities (O), and Threats (T)**

(Note: For this free download, only the first 8 statements in each section are available. Our full analysis will include all the statements along with several additional assessment questionnaires and forms.)

I. Strengths

For each statement below, put a 3 in the appropriate column.

	<i>Disagree</i>	<i>Neither agree nor disagree</i>	<i>Agree</i>
1. We have a high level of competence.			
2. We have competitive skill.			
3. We are ahead on the experience curve.			
4. We have adequate financial resources.			
5. We have a good reputation with buyers.			
6. We are an acknowledged market leader.			
7. We have well-conceived functional area strategies.			
8. We have access to economies of scale.			
9. ...more statements...			
Total number of 3's			

II. Weaknesses

For each statement below, put a 3 in the appropriate column.

	<i>Disagree</i>	<i>Neither agree nor disagree</i>	<i>Agree</i>
1. We have no clear strategic direction.			
2. Our facilities are obsolete.			
3. We are lacking managerial depth and talent.			
4. We are missing some key skills or competencies.			
5. We have a poor track record in implementing strategy.			
6. We are plagued with internal operating problems.			

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7. We are falling behind on Research & Development.

8. We have a narrow product line.

9. ...more statements

Total number of ✓'s

III. Opportunities

For each statement below, put a ✓ in the appropriate column.

	<i>No</i>	<i>Maybe</i>	<i>Yes</i>
1. There are additional customer groups that we could serve.			
2. There are new markets or market segments to enter.			
3. We can expand our product/service line to meet customer needs.			
4. We can diversify into related products.			
5. We can control sourcing or supply activities (vertical integration.)			
6. Falling trade barriers are opening foreign markets to us.			
7. We can take advantage of new technologies.			
8. Our rivals are becoming complacent.			
9. ...more statements			
Total number of ✓'s			

IV. Threats

For each statement below, put a ✓ in the appropriate column.

	<i>No</i>	<i>Maybe</i>	<i>Yes</i>
1. Low-cost foreign competitors are entering the market.			
2. Sales of substitute products are rising.			
3. The market is growing more slowly than we expected.			
4. There are adverse shifts in foreign exchange rates and/or trade policies.			
5. Regulatory requirements are becoming onerous.			
6. We are vulnerable to changes in the business cycle or to recessions.			
7. Our customers and/or suppliers are enjoying growing bargaining power.			

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8. Buyers' needs and tastes are changing in directions that point away from our current expertise.

9. ...more statements

Total number of ✓'s

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V. Interpreting the Situational Analysis Assessment of Your Organization

1. Strengths and Weaknesses:

- a) Give yourself 1 point for each ✓ under “Disagree”
- b) Give yourself 2 points for each ✓ under “Neither agree nor disagree”
- c) Give yourself 3 points for each ✓ under “Agree”

2. Threats and Opportunities

- a) Give yourself 1 point for each ✓ under “No”
- b) Give yourself 2 points for each ✓ under “Maybe”
- c) Give yourself 3 points for each ✓ under “Yes”

Total Strengths	_____	Total Threats	_____
+Total Opportunities	_____	+Total Weaknesses	_____
(S + O)	_____		
Minus (T + W)	_____		
Strategic Baseline	=====		

Regular use of this analysis over time will denote the key changes to the strengths and weaknesses of your organization. Our full analysis – with all the statements - will provide a more in-depth SWOT analysis.

Additional questionnaires and activities will also help diagnose and rectify organizational problems.