

SWOT

The company profile depicts the quantity and quality of the company's financial, human, and physical resources. It also assesses the strengths and weaknesses of the company's management and organizational structure. Finally, it contrasts the company's past successes and traditional concerns with the company's current capabilities in an attempt to identify the company's future capabilities.

A. SWOT Analysis (You may use some or all of the criteria that follow)

Template: Company Situation Analysis

Form: SWOT Analysis Checklist

1. Internal Strengths and Weaknesses

a. Marketing

b. Financial and Accounting

(1) Ratio analysis

Templates: Ratios

Comparative Ratios

(2) Sources and uses of funds

Templates: Calculating the Cash Budget

Ratios

Cash Flows Working Paper: Direct Method

Cash Flows Working Paper: Indirect Method

c. Production, Operations, Technical

d. Human Resources

e. Quality Management

f. Information Systems

g. Organization and General Management

2. External Opportunities

a. Serve additional customer groups or expand into new markets or segments

b. Expand product line

c. Transfer skills to new products or businesses

d. Integration

(1) Forward

(2) Backward

e. Foreign markets

f. Emerging new technologies

3. External Threats

a. Low barriers to entry

b. Availability of substitute products or services

c. Slower market growth

d. Costly regulatory requirements

e. Growing bargaining power of customers or suppliers

f. Changing buyer needs and tastes

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Use this SWOT CHECKLIST to help you get organized:

SWOT Analysis Checklist (From Irwin Publishing)

Potential Internal Strengths	Potential Internal Weaknesses
<ul style="list-style-type: none"> • Core competencies in key areas • Adequate financial resources • Well-thought-of by buyers • An acknowledged market leader • Well-conceived functional area strategies • Access to economies of scale • Insulated (at least somewhat) from strong competitive pressures • Proprietary technology • Cost advantage • Better advertising campaigns • Product innovation skills • Proven management • Ahead on experience curve • Better manufacturing capability • Superior technological skills • Other? 	<ul style="list-style-type: none"> • No clear strategic direction • Obsolete facilities • Subpar profitability • Lack of managerial depth and talent • Missing some key skills or competencies • Poor track record in implementing strategy • Plagued with internal from operating problems • Falling behind in R&D • Too narrow a product line • Weak market image • Weak distribution network • Below-average marketing • Unable to finance needed • Higher overall unit costs • Other?
Potential External Opportunities	Potential External Threats
<ul style="list-style-type: none"> • Ability to serve additional customer groups or expand into new markets or segments • Ways to expand product line to meet broader range of customer needs • Ability to transfer skills or technological know-how to new products or businesses • Integrating forward or backward exchange • Falling trade barriers in new foreign markets • Complacency among rival firms • Ability to grow rapidly because of strong increases in market demand • Emerging new technologies • Other? 	<ul style="list-style-type: none"> • Entry of lower-cost foreign competitors • Rising sales of substitute products • Slower market growth • Adverse shifts in foreign rates and trade policies • Costly regulatory attractive requirements • Vulnerability to recession and business cycle • Growing bargaining power of customers or suppliers • Changing buyer needs • Adverse demographic changes • Other?

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Marketing-Related Key Success Factors

- * A well-trained, effective sales force
- * Available, dependable service and technical assistance
- * Accurate filling of buyer orders (few back orders or mistakes)
- * Breadth of product line and product selection
- * Merchandising skills
- * Attractive styling/packaging
- * Customer guarantees end warranties (important in mail-order retailing, big ticket purchases, new product introductions)

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