

# How to Conduct a Remote SWOT Analysis for Strategic Planning

# Disclosure

- The content of this presentation does not relate to any commercial entity
- I have no financial relationships to report

# Presenter

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Operations Manager/Senior Business  
Data Analyst



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# Session Goals



General  
guide



Review  
NEDARC  
process



**NOT** in-depth  
*“How To”*

# What is a SWOT analysis?



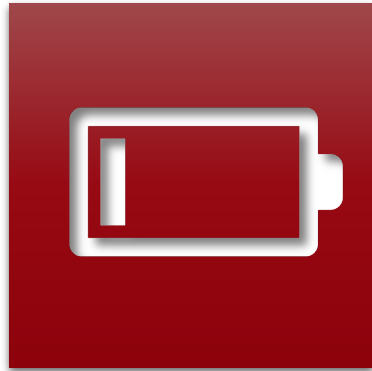
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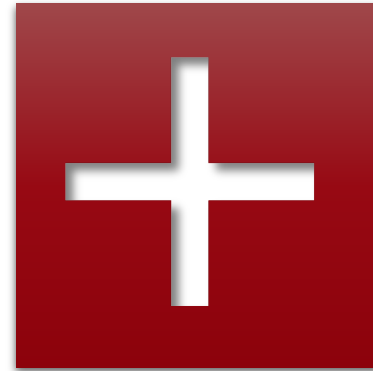
# SWOT stands for . . .



**S**trengths



**W**eaknesses



**O**pportunities



**T**hreats\*

*\*Sometimes Challenges is used instead of Threats*



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It will help  
you evaluate  
your process



# Answer 3 Big Questions

Ask yourself

1. **WHERE** you want to go
2. how you might get there
3. what might get in your way



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# Answer 3 Big Questions

Ask yourself

1. where you want to go

**2.HOW** you  
might get there

3. what might get in your way



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# Answer 3 Big Questions

Ask yourself

1. where you want to go
2. how you might get there

**3.WHAT** might  
get in your way

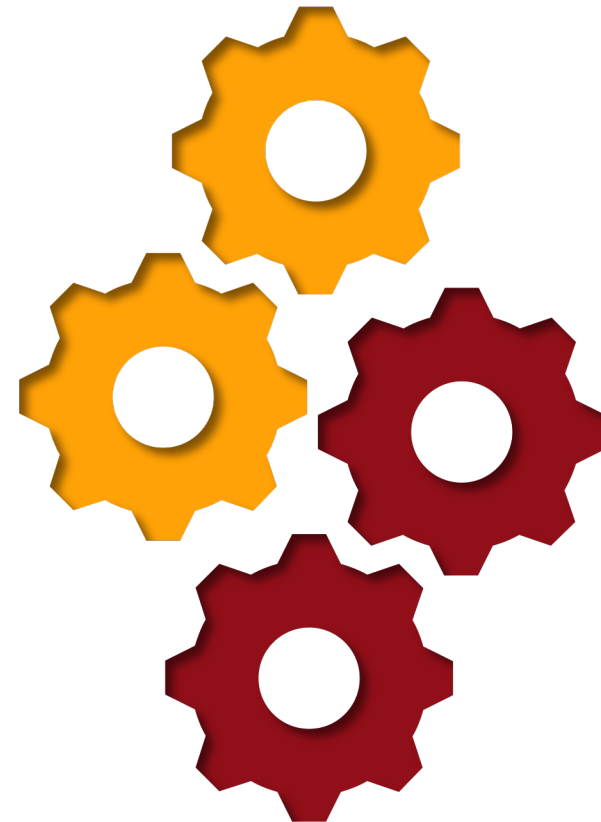


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Conducting a SWOT  
analysis can be  
challenging



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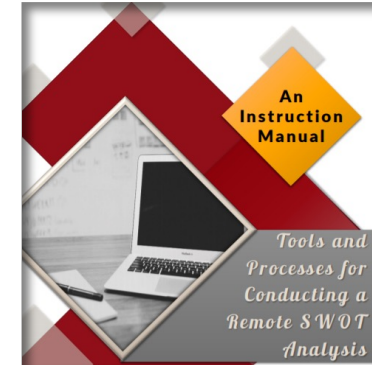
# Conducting Remote SWOT Analysis Challenges



Time- and resource-intensive undertaking



Moving to remote setting



NEDARC staff invented a 100% remote process

[Remote SWOT Process Instruction Manual \(PDF\)](#)

# 4 Downloadable Resources



## Facilitator's Outline for Live Facilitated Meetings

### 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

From NEDARC's [Remote SWOT Process Instruction Manual](#)

New Resources for Conducting Remote Strategic Planning

NEDARC staff have created **3** downloadable resources consisting of a step-by-step instruction manual for conducting a remote SWOT analysis, a template for sharing brainstorm ideas during your remote strategic planning meetings, and a report template to summarize the results, goals, and objectives from your strategic planning.

**3 Downloadable Resources**

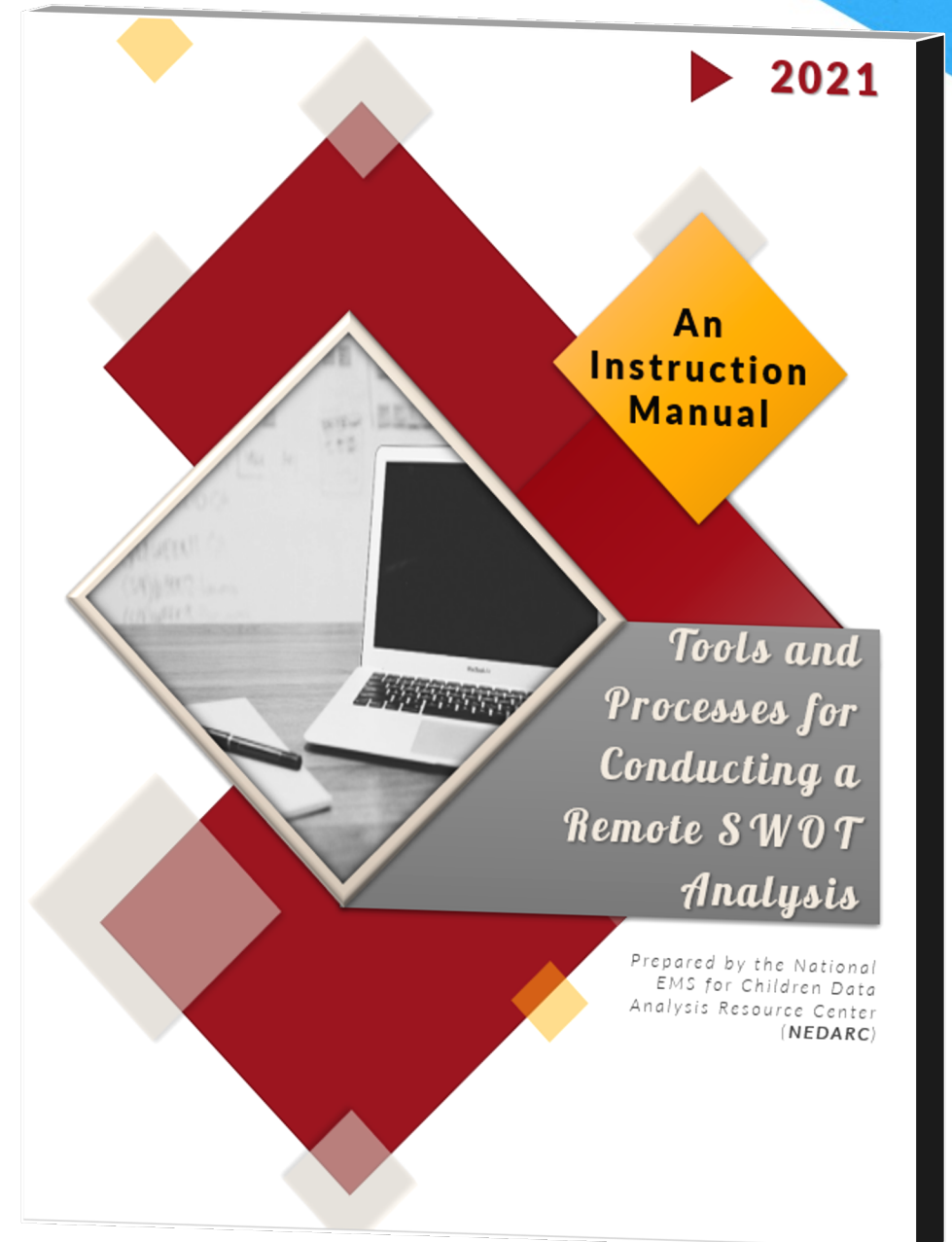
<https://www.nedarc.org/workshops/materials/qualityimprovement.html>

**Details:**

- Remote SWOT Analysis Report is a formatted Word template
- Remote SWOT Process Instruction Manual is a step-by-step how-to
- Remote SWOT Analysis Process Template is a customizable PowerPoint

# 10-Stage Remote Process

Developed by NEDARC staff



# NEDARC's 10-Stage Remote SWOT Analysis Process



Stage 1 - SWOT  
Question  
Development



Stage 2 -  
Brainstorming via  
Online Survey



Stages 3-6 - Four Facilitated  
Live Remote Meetings



Stage 7 - Ranking Grouped  
Ideas via Online Survey



Stage 8 – Work Groups



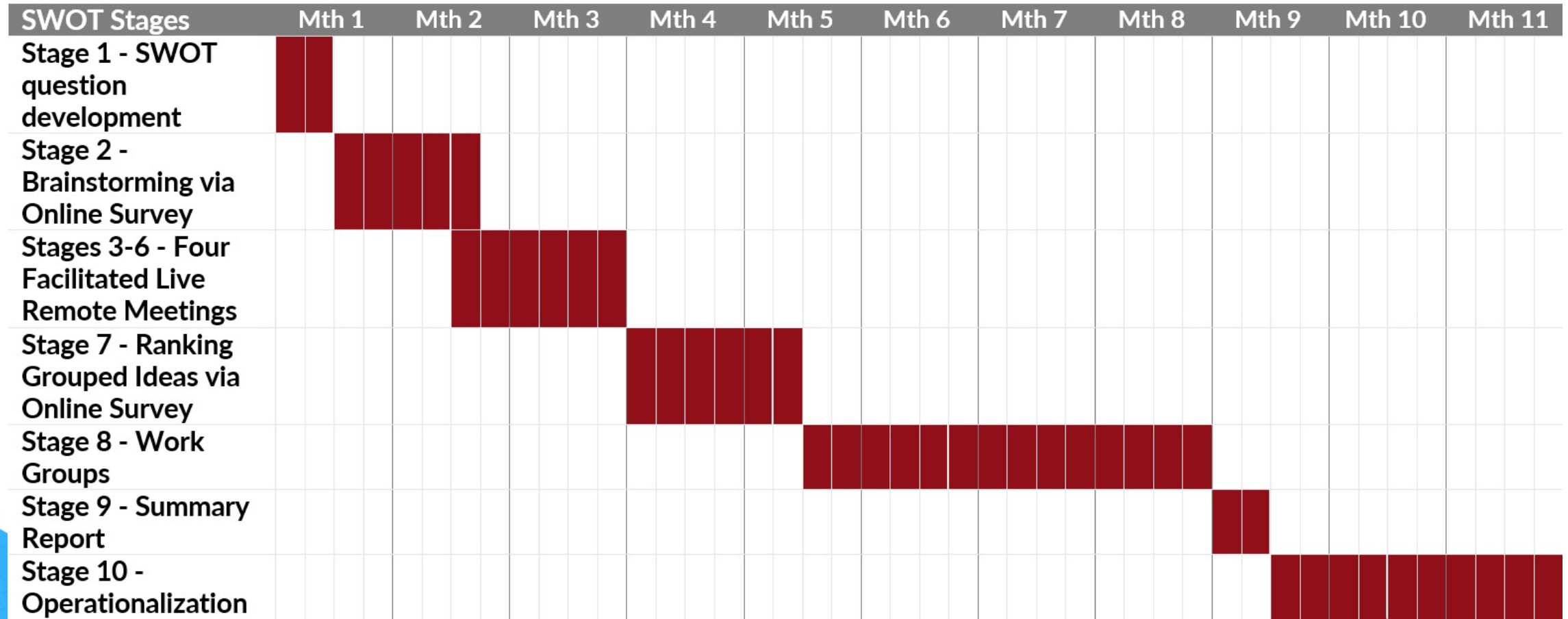
Stage 9 -  
Summary Report



Stage 10 -  
Operationalization

# Estimated Total Time Commitment

*(based on up to 8 participants)*



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# Estimated total time commitment

(based on up to 8 participants)



0.5 + 8 + 3 = 11.5+ Months



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# SWOT: Stage 1

SWOT Question Development



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## SWOT: Stage 1 - SWOT Question Development

[Remote SWOT Process Instruction Manual \(PDF\)](#)

# Step 1: Develop SWOT Question

A woman with long, wavy brown hair and blue eyes is lying on her back on a thick bed of autumn leaves. She is wearing a white, textured knit sweater. Her arms are raised above her head, and she is looking upwards with a thoughtful expression. The leaves are in various shades of brown, orange, and yellow, suggesting a fall setting.

**Don't skip this step!**

## Step 2: Plan Timeline



# 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.



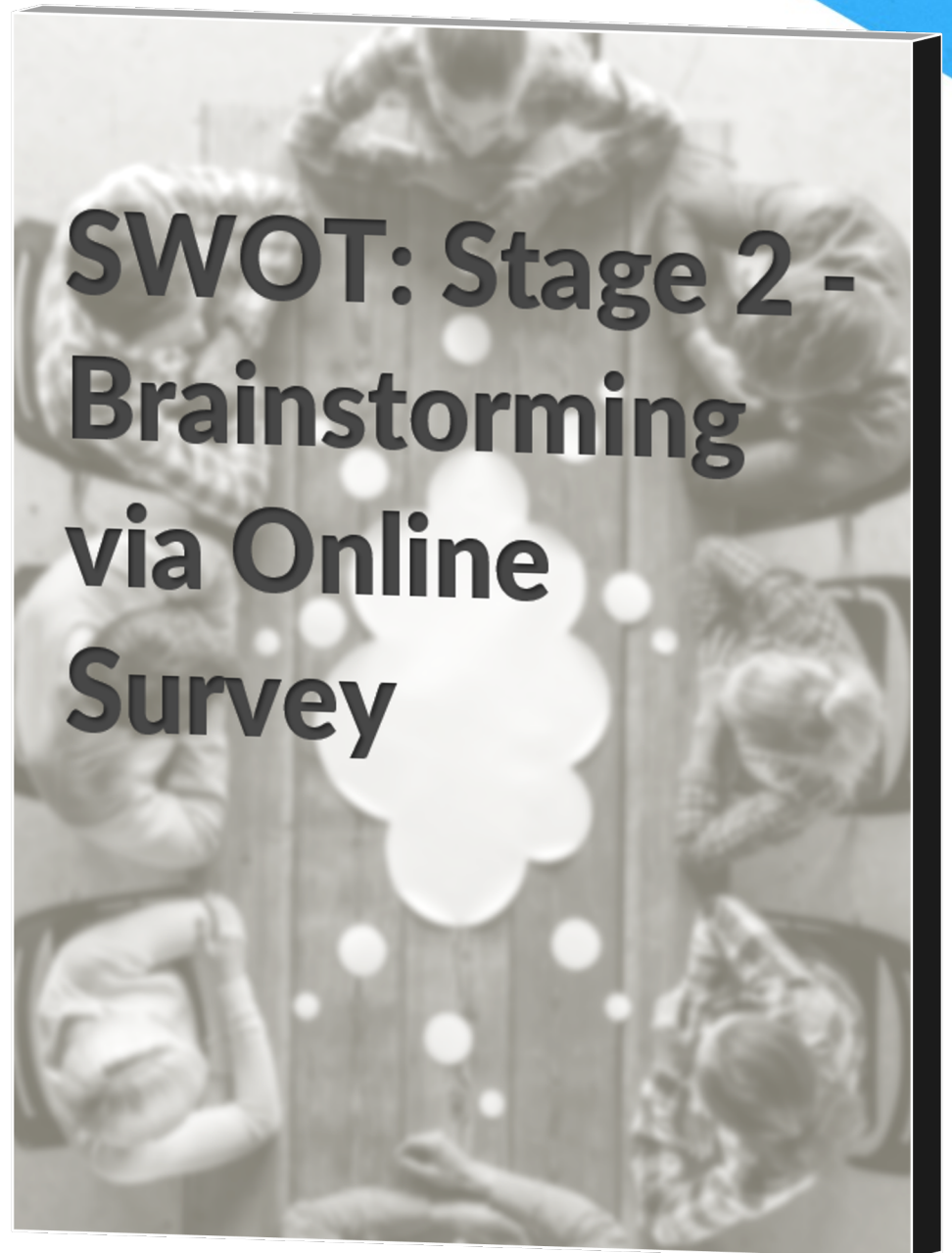
# SWOT: Stage 2

Brainstorming via Online Survey



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[Remote SWOT Process Instruction Manual \(PDF\)](#)

# Step 1: Draft Survey Questions

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.

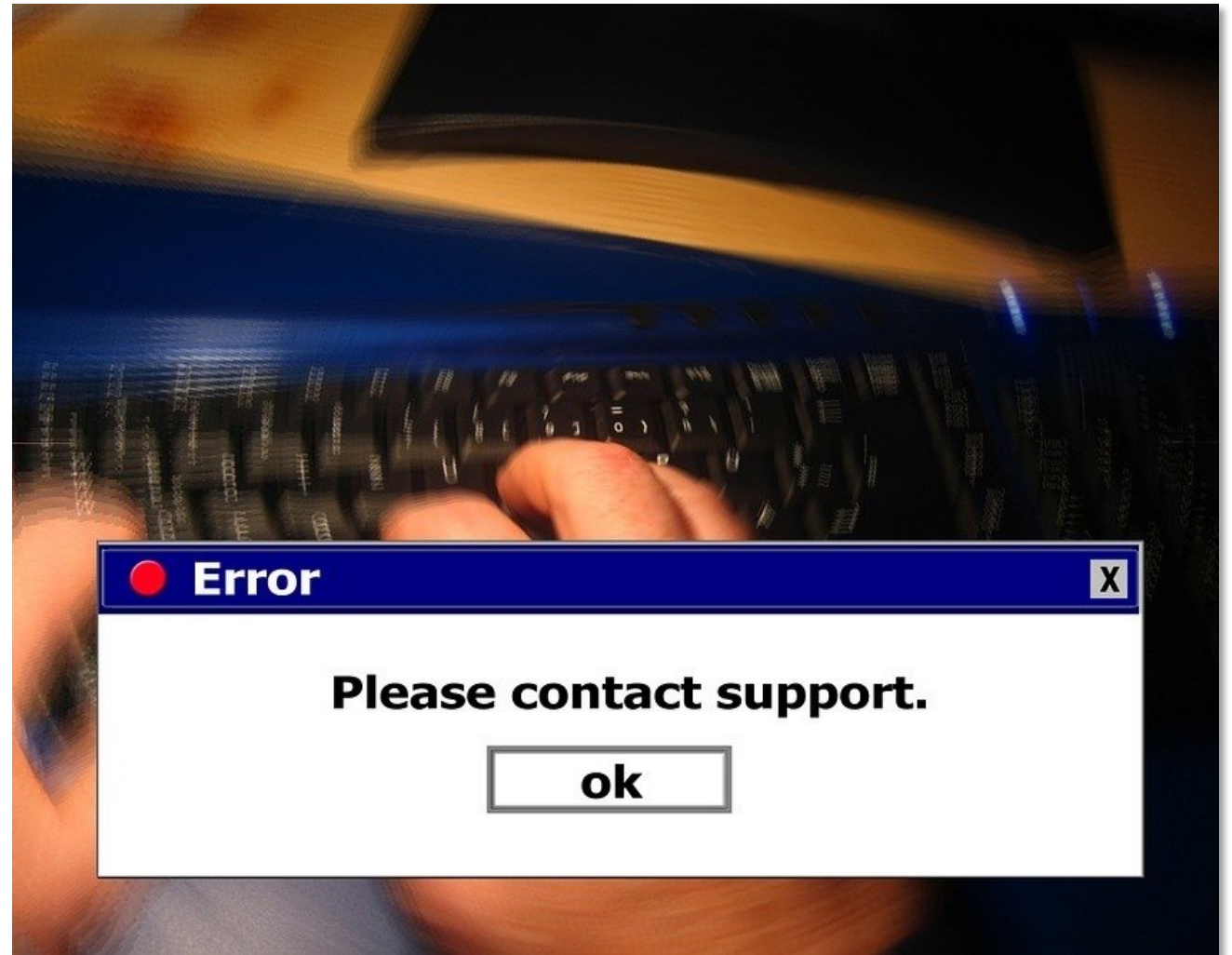
Strength #1  
Please use a noun and verb and be as brief as possible

Strength #2

**ANONYMOUS**

[Remote SWOT Process Instruction Manual \(PDF\)](#)

# Step 2: Test Survey Internally



# Step 3: Email Survey Invitation



# Step 4: Download Respondent's Brainstorming Ideas



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# Stage 2 Estimated Time Commitment and Who is Involved

## Time Commitment

SWOT Stages	Mth 1				Mth 2			
Stage 2 - Brainstorming via Online Survey								
Step 1								
Step 2								
Step 3								
Step 4								

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



## Who is Involved



Project or Organization Manager



Whoever is building the online survey



Participating Stakeholders

# SWOT: Stages 3-6

Four Facilitated Live Remote Meetings



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[Remote SWOT Process Instruction Manual \(PDF\)](#)

# Traditionally...

Review brainstorm ideas which are placed on a wall in 4 groups:

- Strengths
- Weaknesses
- Opportunities
- Threats

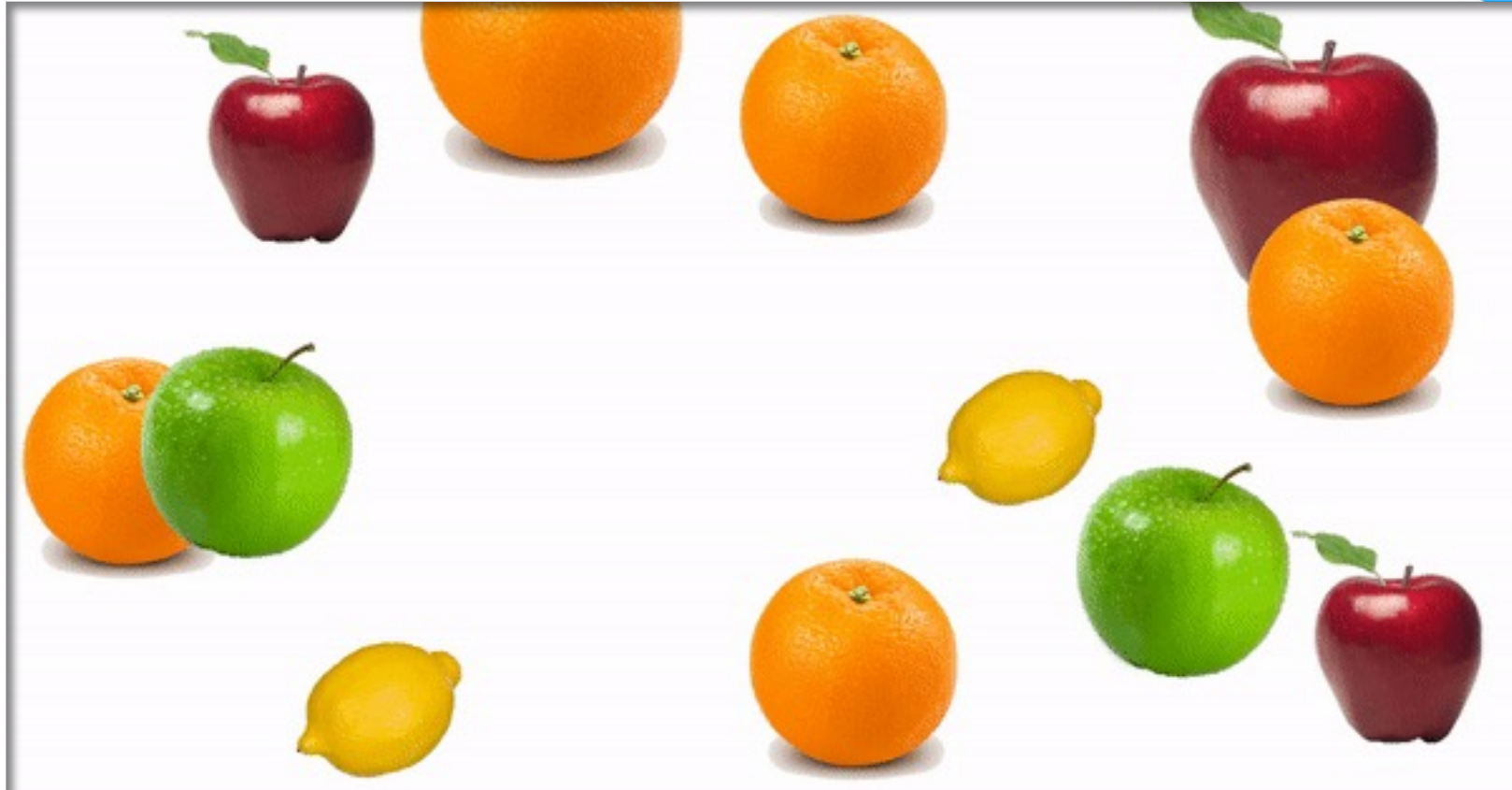


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# Affinity Diagramming

*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.*



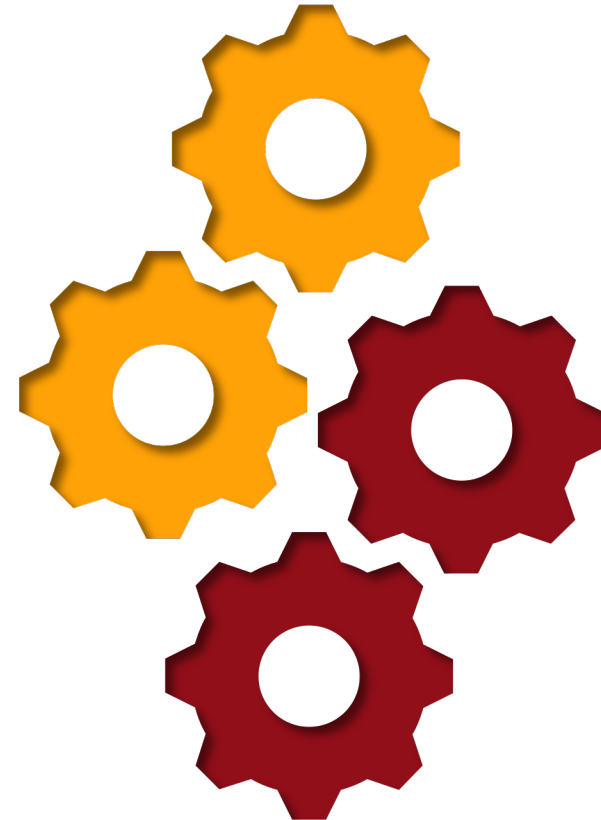
<https://study.com/academy/lesson/affinity-diagrams-definition-examples.html>



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# How to Conduct Affinity Diagramming Remotely



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# Step 1: Determine Tools



# 4 Criteria for Choosing the Right Tool



User -  
friendly



Participant  
access



Screen  
sharing

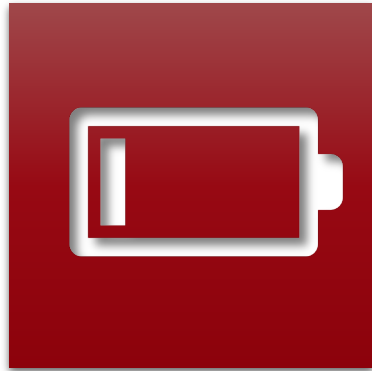


Remote  
access  
capabilities

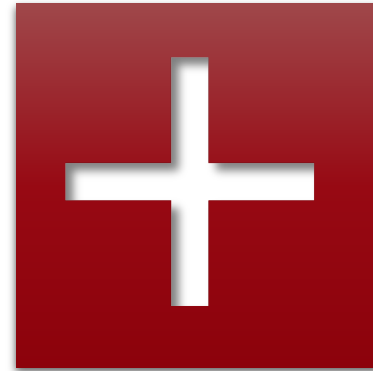
## Step 2: Schedule Four 2-hour Remote Meetings



2 hrs for  
**S**trengths



2 hrs for  
**W**eaknesses



2 hrs for  
**O**pportunities



2 hrs for  
**T**hreats

**8+ hours of live remote meeting**



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# Step 3: Review Brainstorming Ideas

## Template Instructions

- Any slide with the warning sign like the one on this slide is intended for internal use and not intended to be shown to the stakeholders
- Remove these slides before you use for your SWOT
- There are also tips and instructions in the slide notes areas to help explain content and purpose

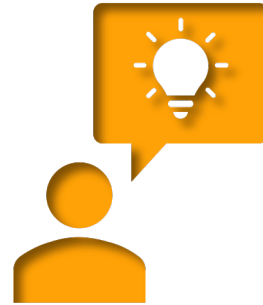


[Remote SWOT Analysis Process PowerPoint Template](#)

# Important to Review ALL Ideas



Increases  
buy-in



Chance to  
add more  
ideas



Gives  
everyone  
attending a  
voice

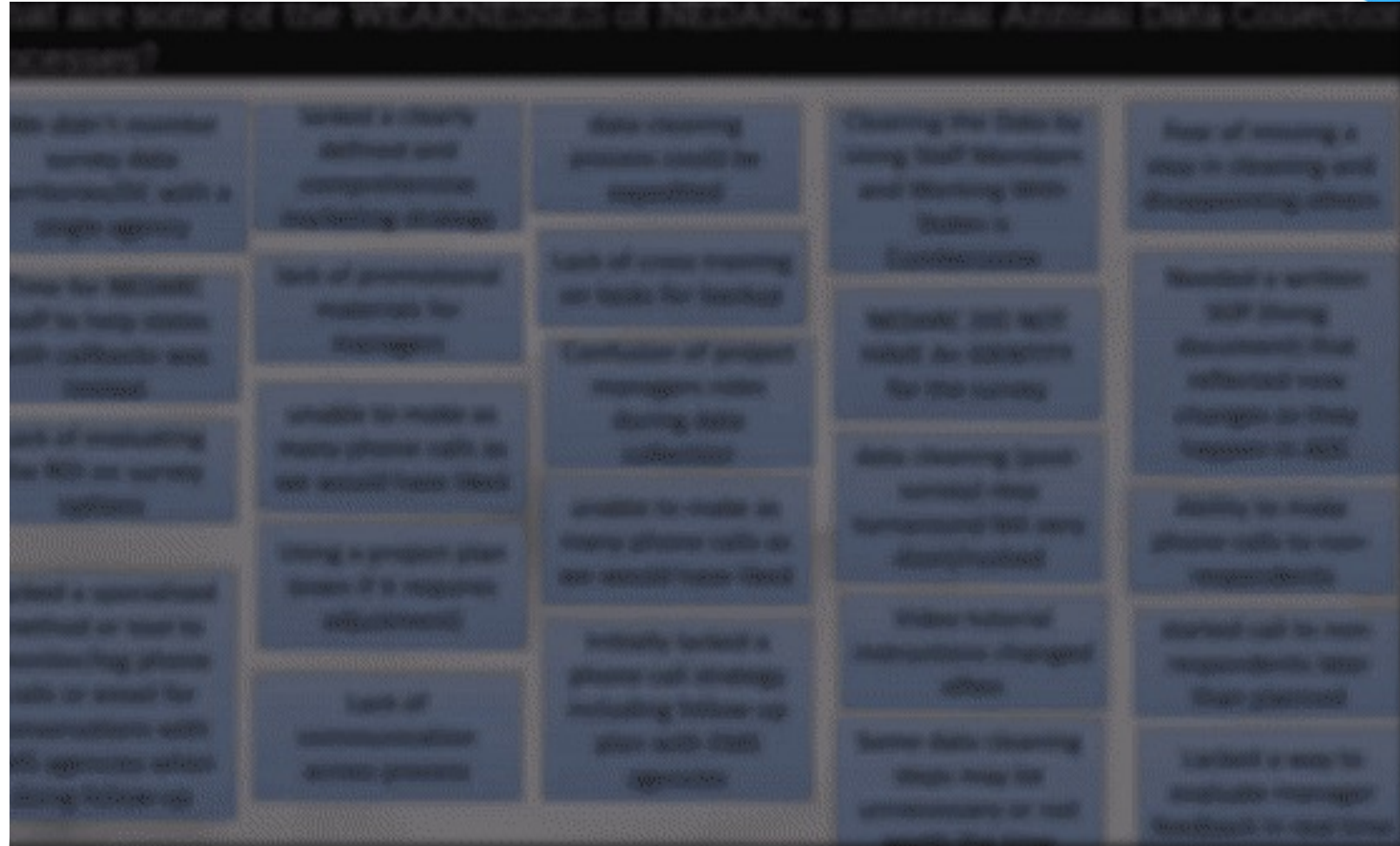
Step 4:  
Adding  
**NEW** Ideas



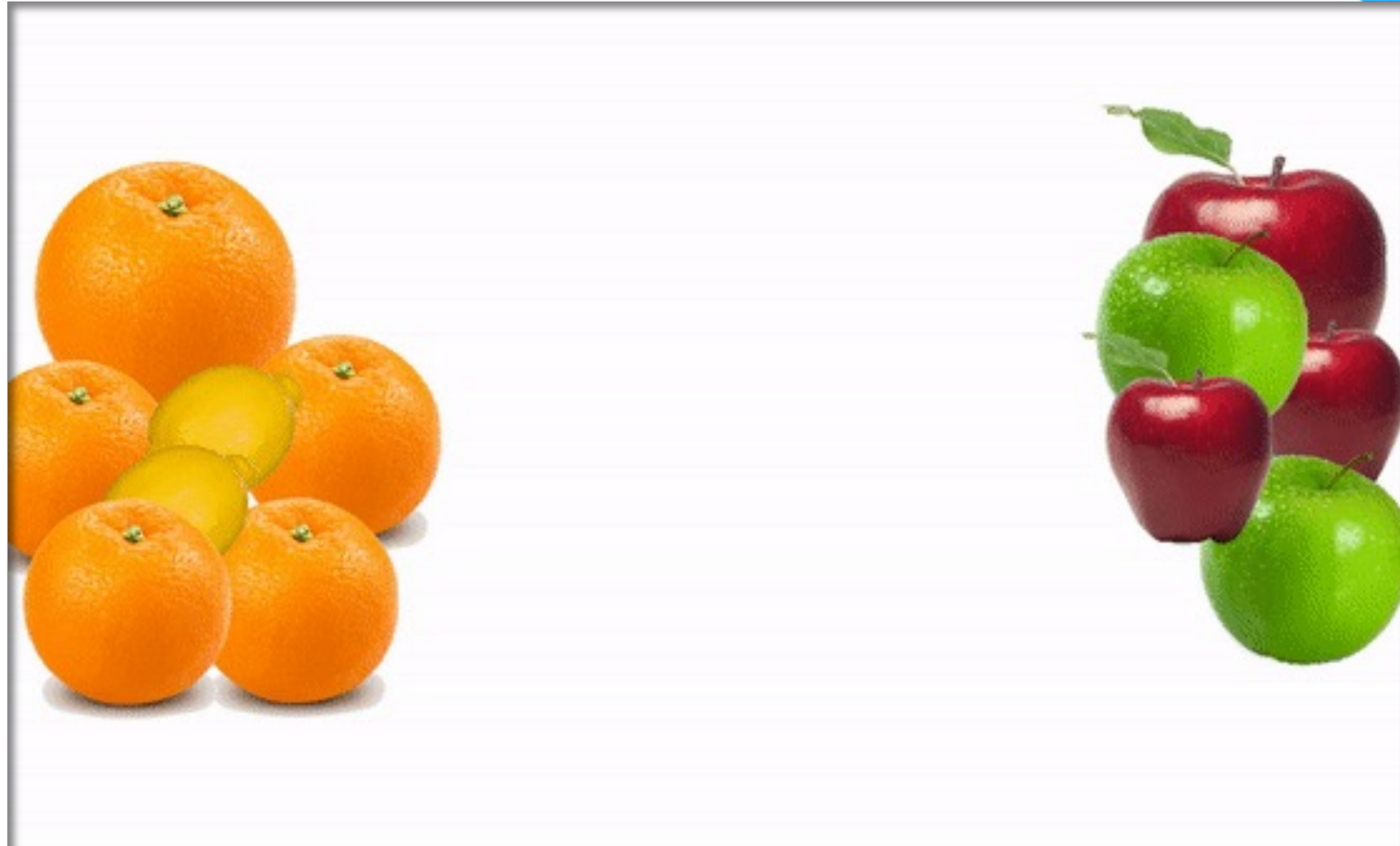
# Step 5: Clarify Ideas



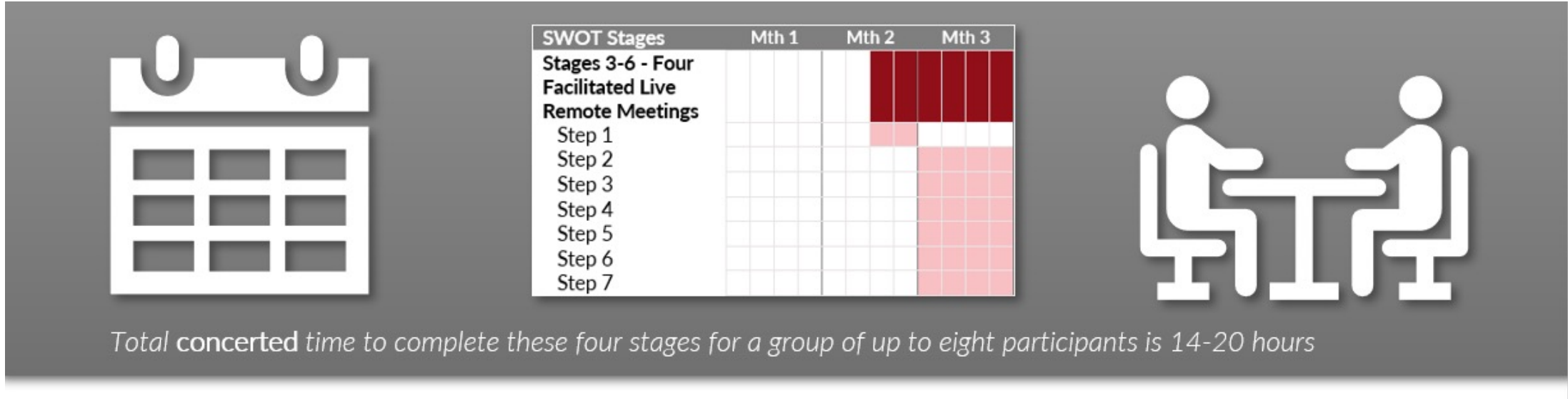
## Step 6: Affinity Diagramming



# Step 7: Developing Group Headers



# Stages 3-6 Estimated Time Commitment and Who is Involved



**Pre-meeting:** 15 min per survey respondent

**Meeting:** 8+ hours of live remote meetings

**Post-meeting:** up to 30 minutes

# Stages 3-6 Estimated Time Commitment and Who is Involved



**Pre-meeting:**  
facilitator and/or  
project manager



**Meeting:** facilitator,  
project manager, and  
all of the participating  
stakeholders



**Post-meeting:**  
facilitator and/or  
project manager

# SWOT: Stage 7

Ranking Grouped Ideas via Online Survey



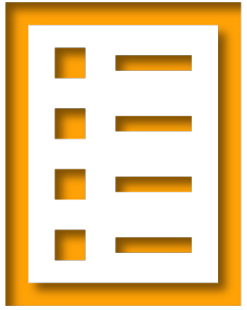
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## SWOT: Stage 7 - Ranking Grouped Ideas via Online Survey

[Remote SWOT Process Instruction Manual \(PDF\)](#)

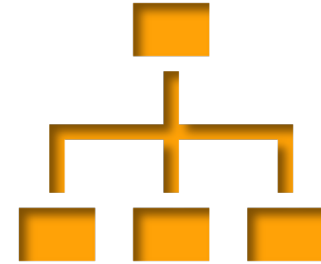
# How to Rank Grouped Ideas Remotely



Survey  
participating  
stakeholders



Importance  
and  
feasibility



Purpose of  
ranking is to  
**prioritize**

# Step 1: Draft Survey Questions

Rank the STRENGTHS titles below based on their IMPORTANCE, with 1 being the most important and X being the least important. Each title should only be given one unique ranking from 1 to X.

*(insert matrix of strengths for respondents to rank based on importance)*

Rank the STRENGTHS titles based on their FEASIBILITY, with 1 being the most feasible and X being the least feasible. Each title should only be given one unique ranking from 1 to X.

*(insert matrix of strengths for respondents to rank based on feasibility)*

## ANONYMOUS

[Remote SWOT Process Instruction Manual \(PDF\)](#)

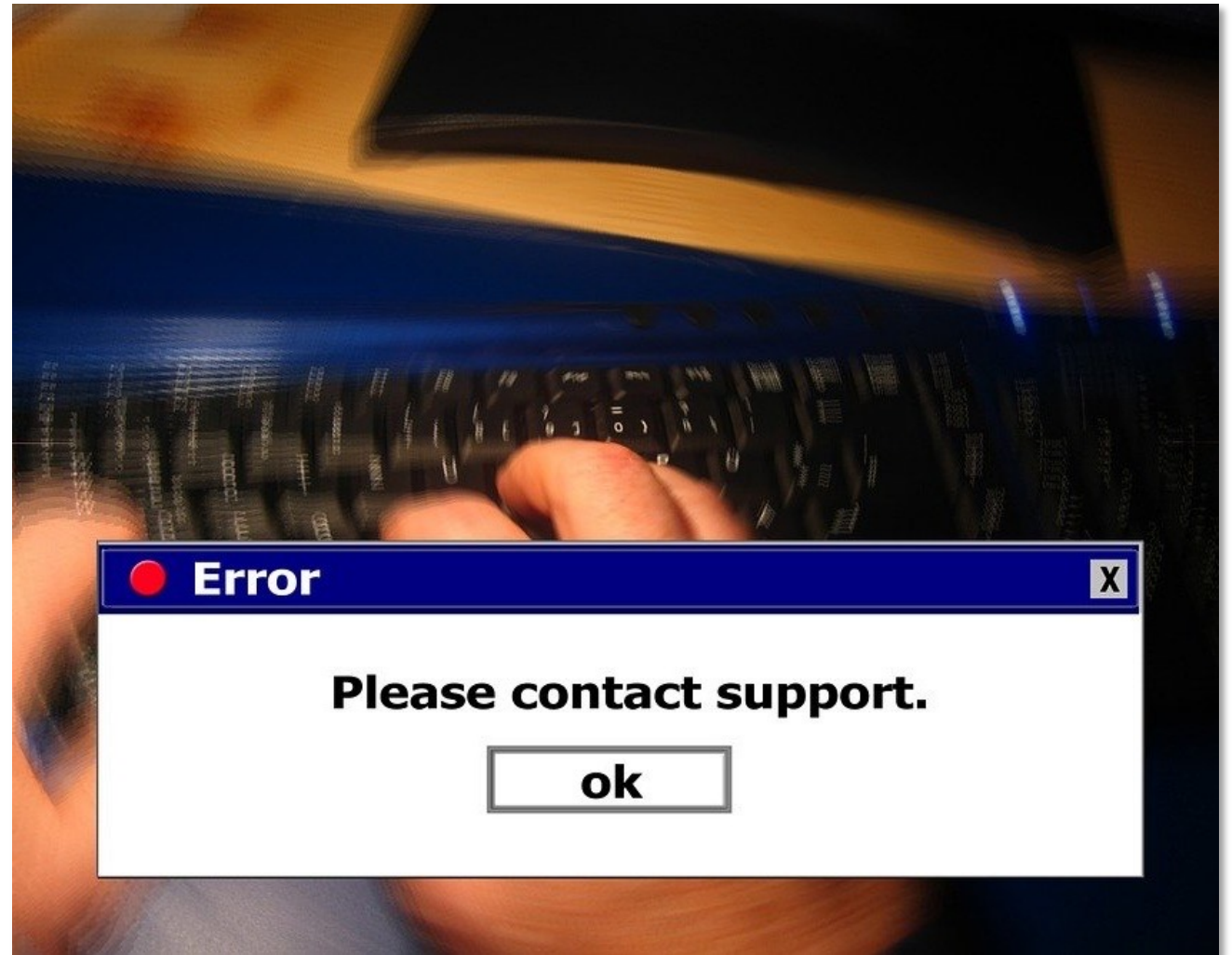


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# Step 2: Test Survey Internally



# Step 3: Email Survey Invitation



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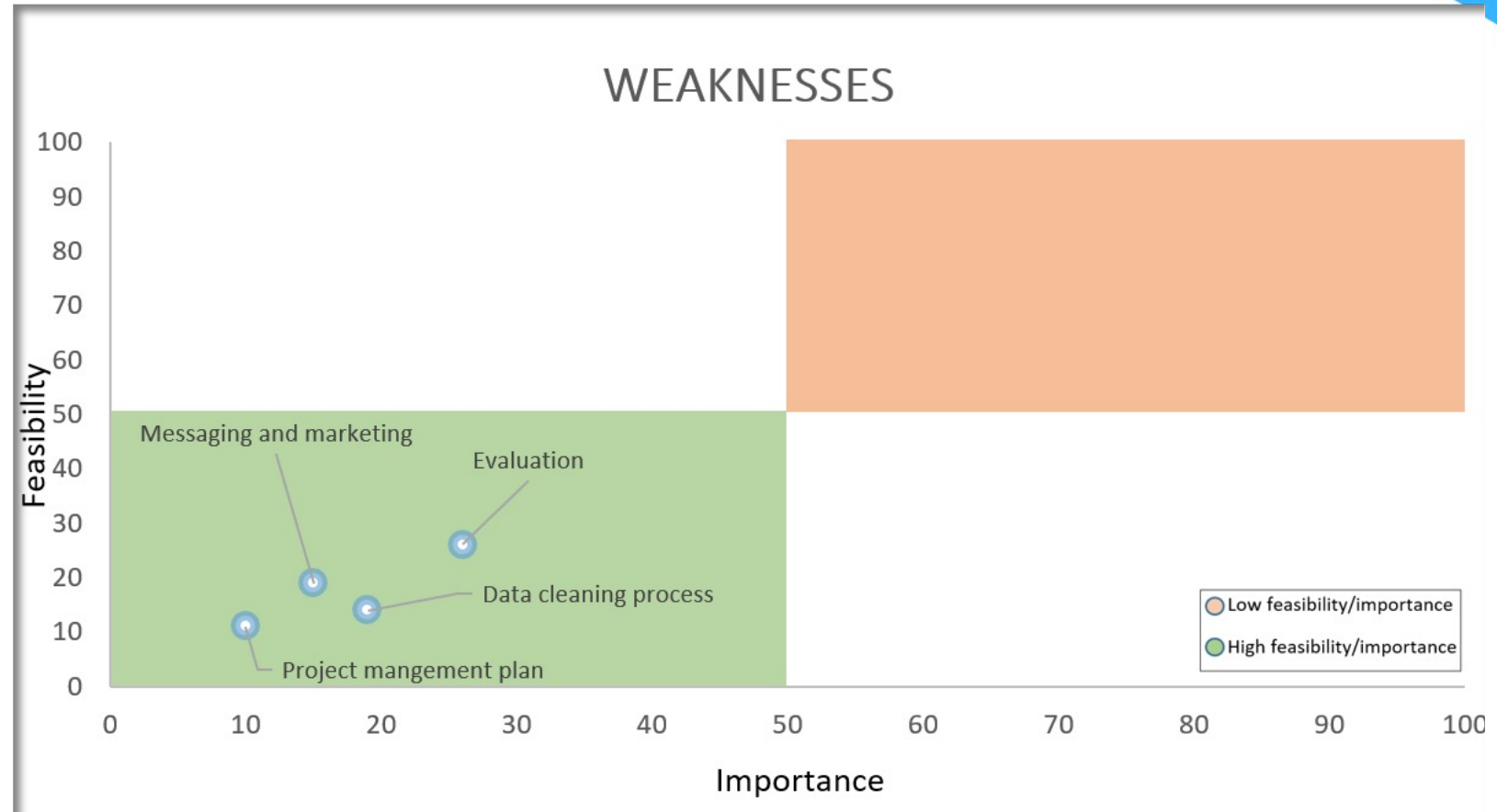
# Step 4: Download & Analyze Respondent's Rankings



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# Step 5: Summarize Results for Participants



[Remote SWOT Analysis Process PowerPoint Template](#)

# Step 6: Identify Top 2-3 Ranked Ideas



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# Stage 7 Estimated Time Commitment and Who is Involved

## Time Commitment

SWOT Stages	Mth 1	Mth 2	Mth 3	Mth 4	Mth 5
Stages 3-6 - Four Facilitated Live Remote Meetings					
Stage 7 - Ranking Grouped Ideas via Online Survey					
Step 1					
Step 2					
Step 3					
Step 4					
Step 5					
Step 6					

**Steps 1-3:** 2-3  
concerted hours

**Steps 4-5:** 2-3  
concerted hours

**Step 6:** ~2 hours  
reviewing

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

# Stage 7 Estimated Time Commitment and Who is Involved

## Who is Involved

### Steps 1-3:



Facilitator



Project  
Manager



Participating Stakeholders

### Steps 4-5:



Facilitator



Project  
Manager

### Step 6:



Facilitator



Project  
Manager



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# SWOT: Stage 8

Work Groups



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## SWOT: Stage 8 - Work Groups

[Remote SWOT Process Instruction Manual \(PDF\)](#)

Work Group  
Focus is to  
Develop a Goal  
for Each Top  
Priority



# Step 1: Share Results in Matrix

SWOT Matrix			
		HELPFUL	HARMFUL
		<b>Strengths</b>	<b>Weaknesses</b>
INTERNAL	1.		1.
	2.		2.
	3.		3.
EXTERNAL		<b>Opportunities</b>	<b>Threats</b>
	1.		1.
	2.		2.
	3.		3.

[Remote SWOT Analysis Process PowerPoint Template](#)

# Step 2: Meet with Participating Stakeholders



Schedule  
remote  
meeting



Work group  
assignments



Share  
template  
for their  
work



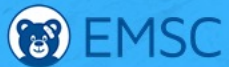
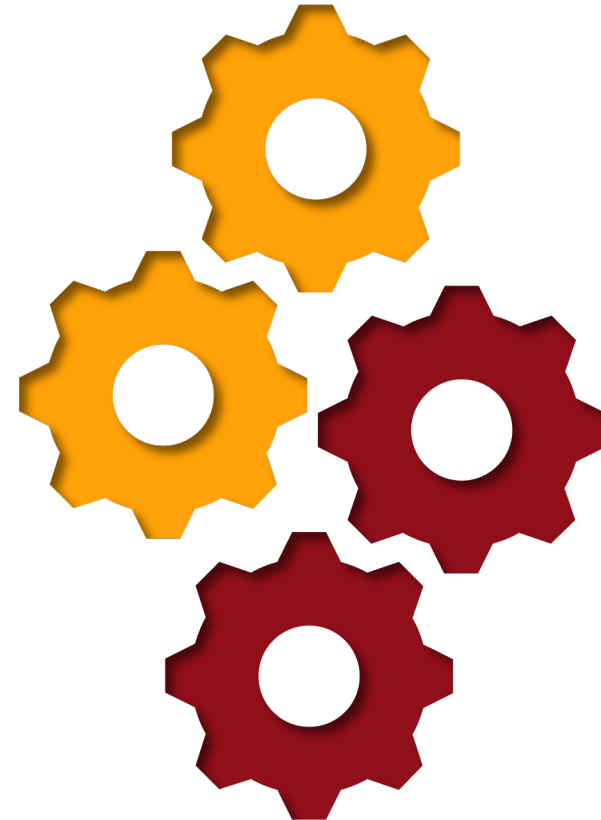
Deadline for  
all work  
group goal,  
objectives, &  
action items



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## Step 3 Work Groups' Meet for Assigned Goal, Objectives, and Action Items



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# Review All Brainstorming Ideas for Assigned Priority



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# Schedule Series of Remote Meetings



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# Meet Until Complete Goal, Objectives, and Action Items



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# Complete Work by Agreed Upon Deadline



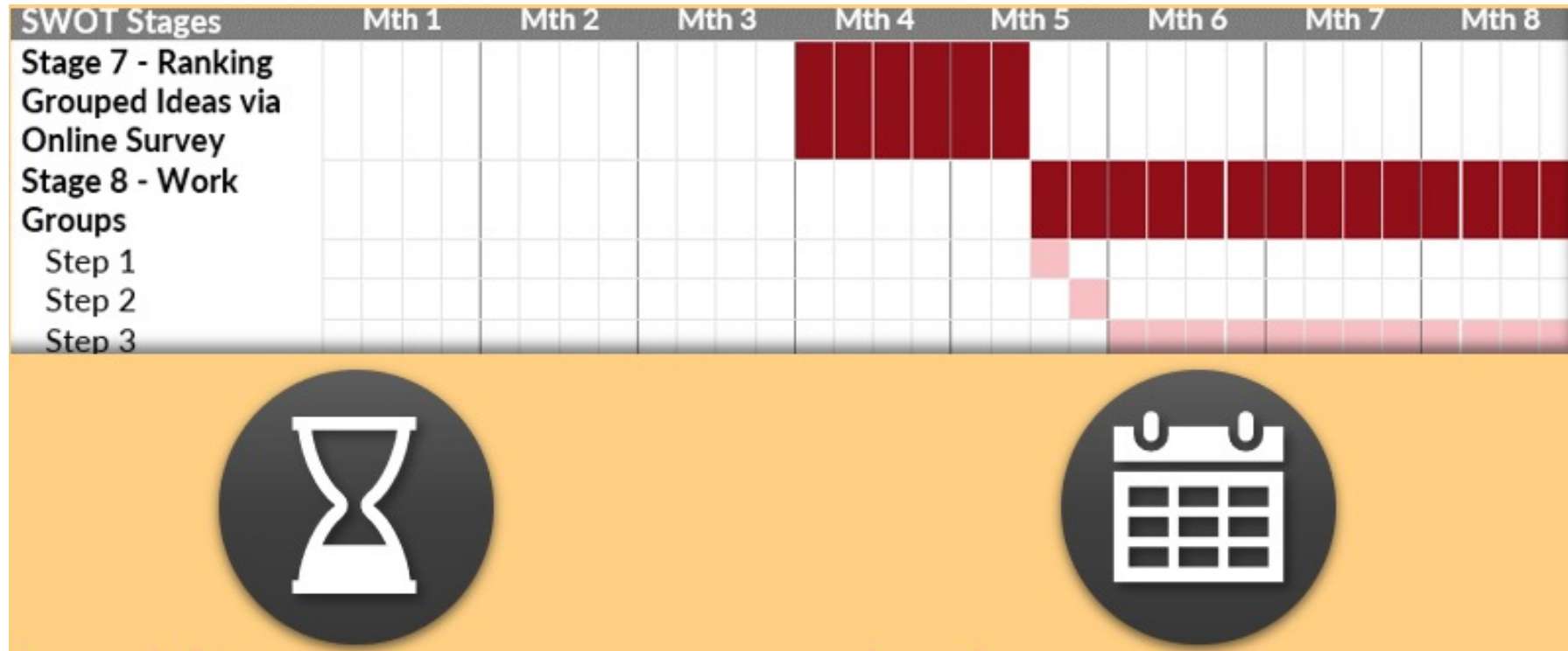
# Report Back to ALL Participating Stakeholders



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# Stage 8 Estimated Time Commitment and Who is Involved



**Steps 1-2:** ~1.5 hours

**Step 3:** 1-5 hours per work group per meeting

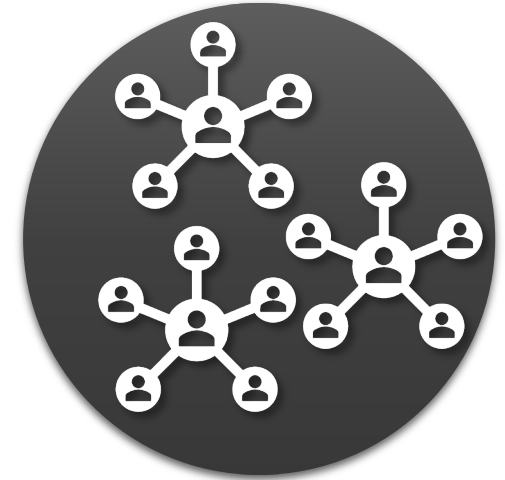
# Stage 8 Estimated Time Commitment and Who is Involved



**Pre-meeting:**  
facilitator and/or  
project manager



**Meeting:** facilitator, and  
all of the participating  
stakeholders



**Work group  
meetings:** assigned  
stakeholders for  
each work group

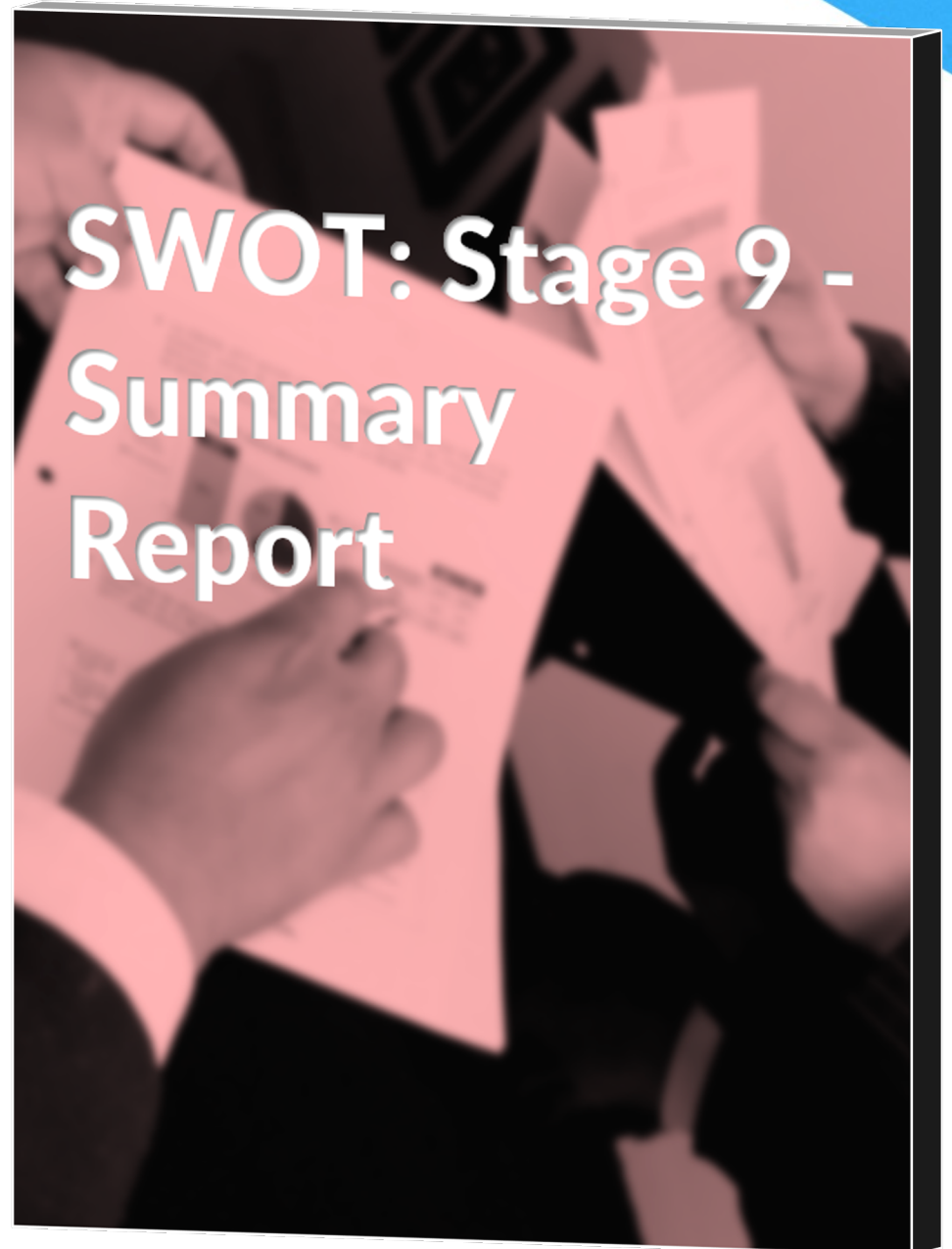
# SWOT: Stage 9

Summary Report



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[Remote SWOT Process Instruction Manual \(PDF\)](#)

# Summarize All Results in a Report



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Remote SWOT  
Analysis Results  
Report

2020



Strategic Planning for  
[insert your information  
here]

[Remote SWOT Analysis Report Template](#)

# Transcribed Exactly!



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## Remote SWOT Analysis Results Report

2020



Strategic Planning for  
[insert your information  
here]

[Remote SWOT Analysis Report Template](#)

# Shared with **ALL** Stakeholders



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## Remote SWOT Analysis Results Report

2020



Strategic Planning for  
[insert your information  
here]

[Remote SWOT Analysis Report Template](#)

# Stage 9 Estimated Time Commitment and Who is Involved

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 and the report template mentioned in the previous section, this stage should only take about 1-2 hours of **concerted** time.*

## Who is Involved

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



# SWOT: Stage 10

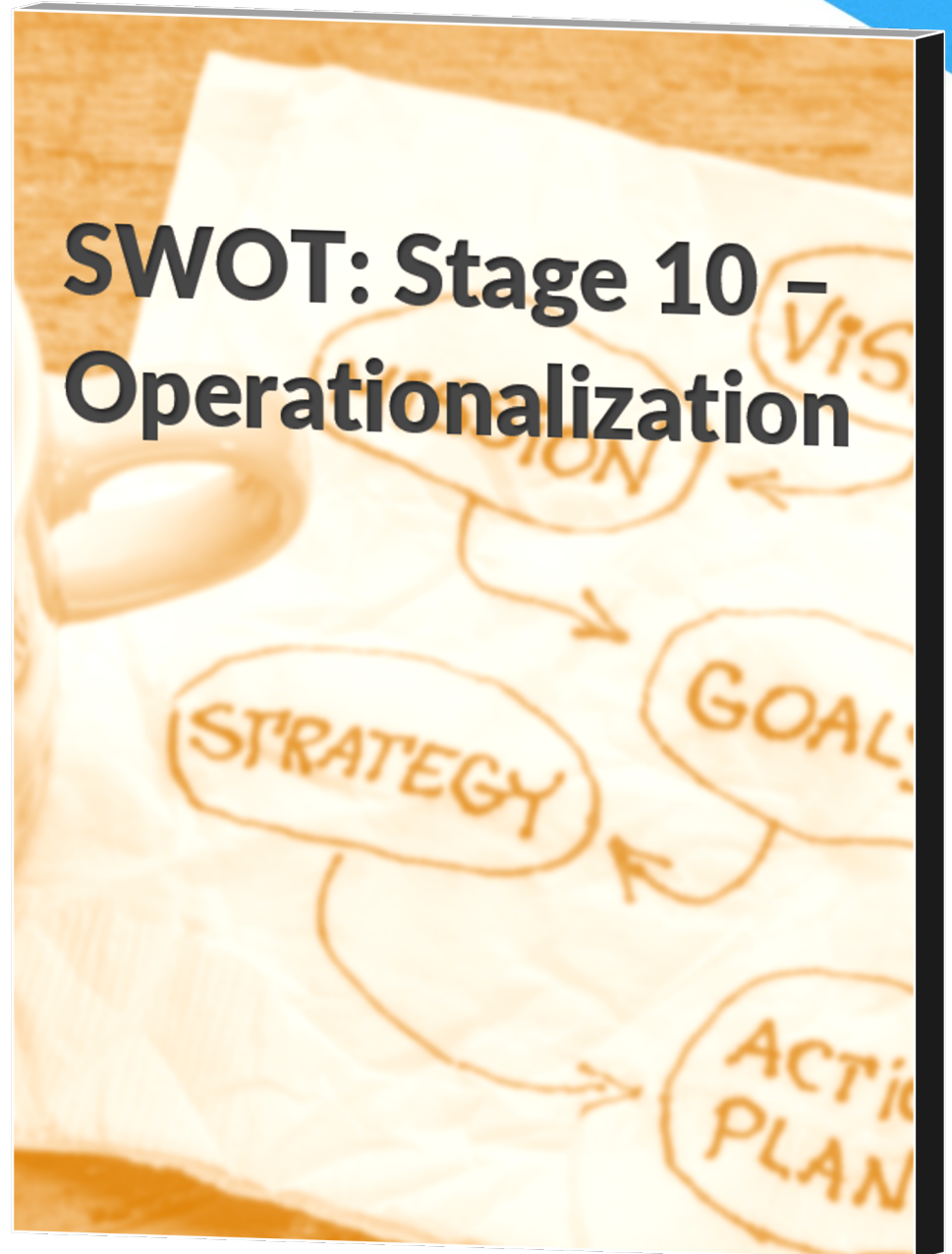
Operationalization



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[Remote SWOT Process Instruction Manual \(PDF\)](#)

# Project Management Plan



# SWOT Analysis = Evaluation Tool



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# Stage 10 Estimated Time Commitment and Who is Involved

SWOT Stages	Mth 1	Mth 2	Mth 3	Mth 4	Mth 5	Mth 6	Mth 7	Mth 8	Mth 9	Mth 10	Mth 11
Stage 10 - Operationalization											

## Who is Involved

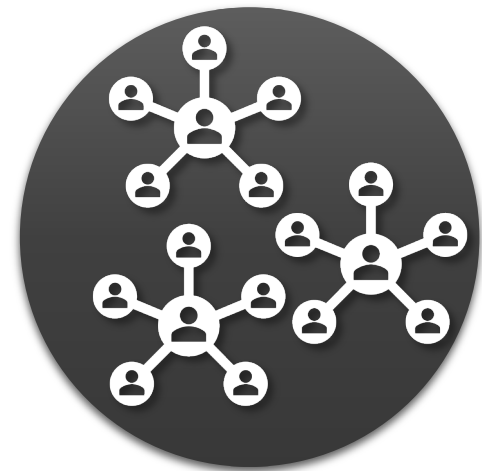
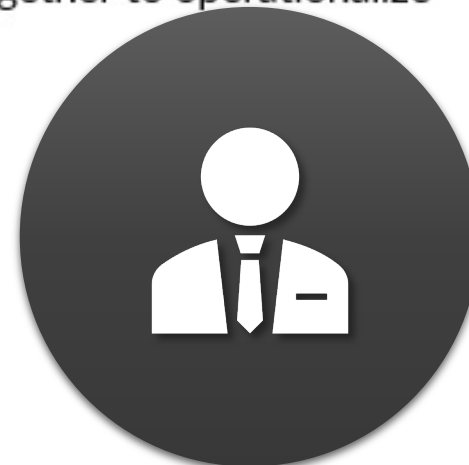
project manager and stakeholders identified in the summary report to work together to operationalize



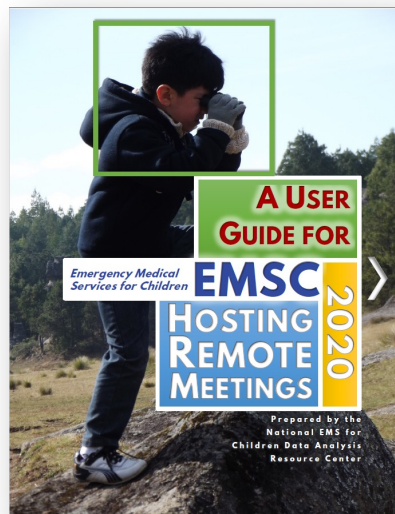
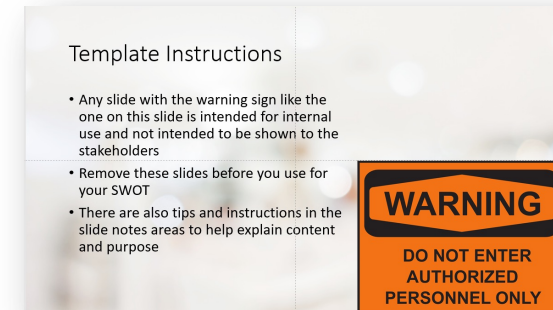
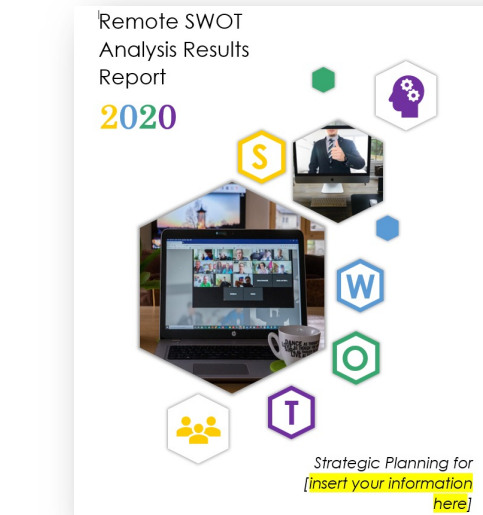
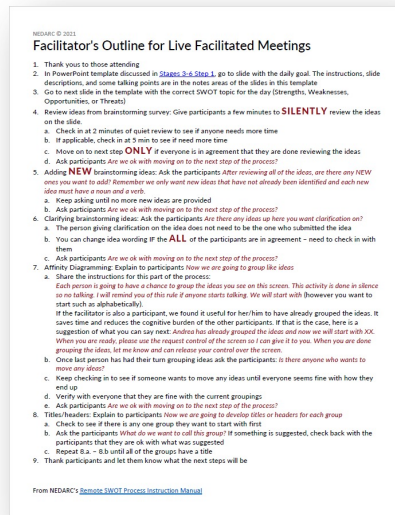
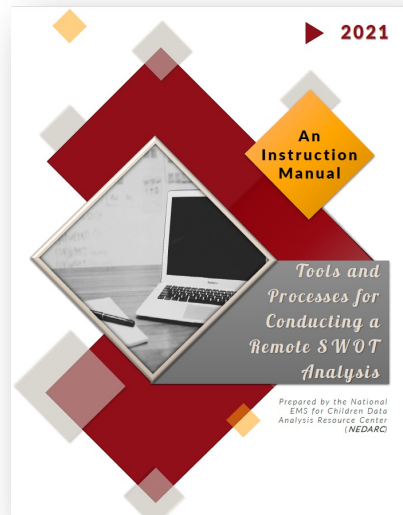
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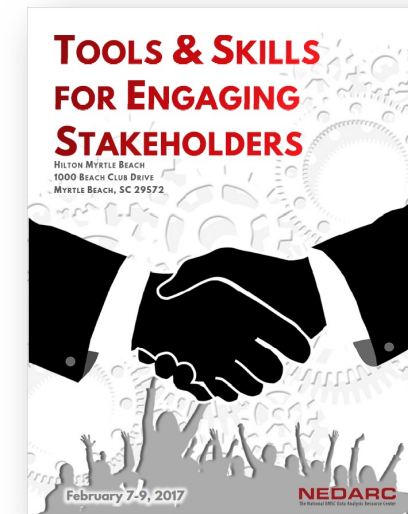
#EMSC2021meeting



# Downloadable NEDARC Resources



TECHNOLOGY CHECKLIST	
Phone Conference	Remote Meeting
Share correct call-in number with all participants	Provide all participants correct login information
Quiet background noises (fans, music, phones)	All participants install remote meeting tool (if necessary)
Share keyboard commands for mute, unmute (if conferencing on phone)	Get and install a high-quality webcam
Beginning of call check-in	Test webcam prior to meeting
Beginning of call: all non-speaking participants mute their line	Install high-quality microphone and headset
Audio Visual	Test microphone and headset prior to meeting
Set up projection screen	Shut down unnecessary computer programs
Set up and focus projector	At beginning of call everyone checks in
Connect computer to projector	Test sharing your screen/document
Test presentation on projector	None
Test video on projector (if using video)	
Test wireless remote with computer & presentation	
Install fresh batteries in presentation remote	
Connect computer to speakers (if using audio)	
Test sound and adjust on presentation or video (if using audio)	
Install fresh batteries in microphone and receiver (if using a microphone)	
Test microphone and adjust sound system (if using microphone)	
Adjust room lighting as needed	
Quiet background noises (fans, music, phones)	
Close email and messaging clients to prevent audio/video interruptions	



[Remote Meeting User Guide](#)

[Technology Checklist for Remote Meetings](#)

[Tools and Skills for Engaging Stakeholders workshop manual](#)

# Review of 10 stages of remote SWOT process

