SWOT analysis template with evidence columns and a facilitation script

A SWOT analysis template lists strengths, weaknesses, opportunities and threats for one subject before a choice is made. This kit adds what a four-box grid leaves out: a column for how you know each point, a test of what the team controls, and a step that pairs entries into a few choices with an owner and a date. It comes with a timed 90-minute script and a filled example from a fictional training team.

90 minutes | 4–12 participants | Online and adaptable in person

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The outcome

By the end of 90 minutes the team has one agreed subject and goal, a SWOT register in which every entry is a checked fact or a named assumption, a “so what” line and votes for each entry, at least four paired choices, and a shortlist of up to four actions or checks with an owner, a first step and a due date.

Before the session

- For facilitators, trainers and team leads who run a SWOT workshop with 4–12 adults about one subject: a service, a course, a team or a project. It is not a market study.
- Fill in the framing sheet with the sponsor before the session. Ask people to bring evidence they already have, such as reports, forms, notes and plans. Do not start without a named decider.
- Print one silent writing sheet per person and one set of the other sheets for the group, or share the workbook on a screen. Plan four quadrant groups of one to three people.
- Send the framing sheet and the four prompts a day early for people who use a screen reader or want time to think. Quadrants are named by letter, not by colour, votes are written and anyone may pass.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Framing sheet
- Silent writing sheet
- SWOT register
- Pairing sheet
- Shortlist
- Filled example: SWOT register
- Filled example: pairings
- Filled example: shortlist
- Facilitator section: run of show, reference tables, debrief and adaptations

Framing sheet

Fill this in with the sponsor before the session and read it aloud at the start. A SWOT without one subject and one goal becomes a list of everything.

Question	Our answer
The subject: one service, course, team or project	
The goal: the decision or plan this SWOT serves	
The time horizon: from when to when	
Who decides afterwards, and by when	
Who is in the room, and who facilitates	
Whose view is missing, and how we bring it in	
Out of scope: what we will not discuss today	
Evidence we bring: reports, forms, notes, plans	

Silent writing sheet

One sheet per person. Write one sentence per row that someone could check. Next to it, write how you know: a number, a date or a source. If you cannot, write “assumption: check with” and a name.

Prompt	My entry: one sentence someone could check	How I know
Works well, and is ours to keep		
Works well, and is ours to keep		
Holds us back, and is ours to fix		
Holds us back, and is ours to fix		
Happening outside us, and could help		
Happening outside us, and could help		
Happening outside us, and could hurt		
Happening outside us, and could hurt		

SWOT register

One row per entry. Write S, W, O or T. A checked fact (F) has a number, a date or a source that someone in the room has seen. Anything else is an assumption (A) with a name to check. Copy this page for more entries.

#	Entry: one sentence someone could check	S W O T	Evidence: how we know	F or A	So what, for our goal	Votes

Pairing sheet

Pair one internal entry (S or W) with one external entry (O or T). S with O: use. W with O: fix to gain. S with T: shield. W with T: fix first. Write the choice with a verb first. Mark A if either entry is an assumption.

#	Internal entry	External entry	Pairing	Our choice: start with a verb	Votes	A?
C1						
C2						
C3						
C4						
C5						

Shortlist

Up to four choices, picked by the decider. A choice that rests on an assumption goes in as a check. The owner says yes before the name is written.

#	From	Action or check	Owner	First step	Due	Done when
A1						
A2						
A3						
A4						

Filled example: SWOT register

A fictional learning team of five reviews Welcome Week, its onboarding course, on Wednesday 4 November 2026. F is a checked fact and A is an assumption: eight facts and four assumptions. Five people cast 15 votes.

#	Entry	Evidence: how we know	F or A	So what	Votes
S1	The day 3 call practice with a buddy is the session that new starters value most.	End-of-course forms, October intake: 11 of 12 people named it the most useful session.	F	Protect its time when we change anything else.	3
S2	Both trainers can deliver every session of the week.	Delivery records for the last three intakes: each trainer has led every session at least once.	F	We can run two groups in the same week.	1
S3	Our joining instructions are clear.	Assumption: check with three people from the October intake. The form does not ask.	A	If not, fix them before January.	0
W1	The systems training on day 2 runs over time.	Trainer notes: day 2 ended 40, 35 and 50 minutes late in the last three intakes.	F	The last topic of day 2 is rushed or dropped.	3
W2	The week has no check of what a new starter can do at the end.	Course file, read on Monday 2 November: no observed task and no assessment.	F	We cannot show team leaders what the course achieved.	1
W3	Some slides show out-of-date policy.	Assumption: check the slides against the policy list of 1 October.	A	New starters may learn a rule that no longer applies.	0
O1	A new customer records system, with a practice environment, goes live on Monday 30 November.	IT project plan dated 26 October: the practice environment opens on Monday 16 November.	F	People could practise on a safe copy of the real system.	3
O2	Team leaders are willing to release experienced advisers as buddies.	Assumption: two of the four team leaders said so informally. Check with all four.	A	More buddy time would be possible on day 3.	1
O3	HR will review the first-month checklist for new starters in December.	Email from HR of 20 October.	F	The course and the checklist could use the same words.	0
T1	The January intake is 24 people, double the usual 12, and the training room seats 14.	Recruitment plan approved on 28 October. Room booking system.	F	One group will not fit in the room.	2
T2	The screens of the new system may change after go-live.	Assumption: check with the IT project lead.	A	Materials written in November could be wrong in January.	0
T3	New starters are called back to their teams during days 4 and 5.	Attendance register, October intake: 5 of 12 people missed part of day 4 or day 5.	F	People miss the complaints session on day 4.	1

Filled example: pairings

The team wrote five choices. Combined votes add the votes of the two entries. C5 rests on O2, which is an assumption, so it can only enter the shortlist as a check.

#	Internal entry	External entry	Pairing	Our choice	Votes	Assumption?
C1	S1	O1	Use	Run the day 3 call practice in the practice environment of the new system.	6	No
C2	W1	O1	Fix to gain	Replace the day 2 slide walk-through with three timed tasks in the practice environment.	6	No
C3	S2	T1	Shield	Run the January intake as two groups of 12 in the same week, with one trainer each.	3	No
C4	W2	T3	Fix first	Add an observed call on day 5 and tell team leaders in advance that it needs everyone present.	2	No
C5	S1	O2	Use	Ask each team leader to name one buddy for day 3 of the January intake.	4	Yes: check first

Filled example: shortlist

The learning lead picked four of the five choices. On Wednesday 4 November the due dates are 7, 9, 30 and 37 days away. C4 stays on the pairing sheet for the review on Wednesday 16 December.

#	From	Action or check	Owner	First step	Due	Done when
A1	C5	Check: will all four team leaders release a buddy for day 3?	Learning lead	Put the question on the agenda of the team leaders' meeting.	Wed 11 Nov	Four answers are written down, and O2 is a checked fact or is removed.
A2	C3	Plan the January intake as two groups of 12.	Course coordinator	Book a second room for the intake week.	Fri 13 Nov	Two rooms are booked and both trainers have the dates.
A3	C2	Rebuild day 2 as three timed tasks in the practice environment.	Trainer (systems)	Ask the IT project lead for practice logins and whether the screens will change (T2).	Fri 4 Dec	A colleague who has not seen the tasks finishes all three inside the day 2 timetable.
A4	C1	Move the day 3 call practice into the practice environment.	Trainer (calls)	List the call types that the practice uses now.	Fri 11 Dec	One buddy pair has tried a full practice call in the environment.

Facilitator run of show

1 Open, frame and agree the rules | 8 minutes

Three minutes: read the framing sheet aloud, then say: “This is a SWOT of one subject, for one decision. We look at where we stand before we choose. We are not reviewing past work and we are not solving a problem yet.” Three minutes: read the six rules and ask for questions. Two minutes: name the person who decides the shortlist, and say how people can contribute: aloud, in writing, or by passing.

2 Silent writing | 8 minutes

One minute: hand out the silent writing sheet and say: “Write one sentence per row that someone could check. Next to it, write how you know: a number, a date or a source. If you cannot, write ‘assumption: check with’ and a name.” Six minutes of silence: each person writes at least one entry for each of the four prompts. One minute: each person marks their two strongest entries.

3 Collect and place: inside or outside our control | 14 minutes

Eight minutes: go round the group twice. Each person reads one entry per turn, without explaining it, or passes. People with the same point say “same” and it is recorded once. Entries not read out are added in writing. Six minutes: test each entry with two questions: “Could this team change it on its own? Then it is internal: a strength or a weakness.” “Would it be true if this team did nothing? Then it is external: an opportunity or a threat.” If an entry is an idea for action, say: “That is a choice. Hold it for the pairing step. What is the fact behind it?”

4 Evidence round | 15 minutes

Two minutes: split into four groups, one per quadrant: one person each with four people, three each with twelve. Ten minutes: each group fills the evidence columns for its quadrant. A checked fact needs a number, a date or a source that someone in the room has seen. Everything else is an assumption, with the name of the person or record to check. Three minutes: each group reads out only its assumptions and who will check them. An entry with no evidence and no named check moves to a parked list.

5 Break | 5 minutes

Five minutes away from the table or the screen. The facilitator numbers the entries S1, W1, O1, T1 and so on, and checks that every row has an evidence type.

6 So what, then vote | 12 minutes

Six minutes: the same groups write one “so what” line per entry: what it means for the goal on the framing sheet. Four minutes: each person has three votes and gives them to three different entries in any quadrant, in writing: on a slip, in the chat or in the votes column. Say: “Vote for what matters most for the goal, not for what you like.” Two minutes: count the votes and read out the top entries in each quadrant. Votes order the discussion. They are not a measurement.

7 Pair entries into choices | 15 minutes

Three minutes: show one pair with the top-voted entries. Say: “Take one internal entry and one external entry and ask what we would do because both are true.” Name the four pairings: use, fix to gain, shield and fix first. Eight minutes: in pairs or threes, write at least two choices on the pairing sheet. Each choice starts with a verb and names both entries. Four minutes: read the choices out. Mark each choice that rests on an assumption.

8 Shortlist with owner and date | 9 minutes

Three minutes: the decider picks up to four choices and says why in one sentence each. Six minutes: for each one, write the action, an owner who says yes aloud or in writing, the first step, a due date and what “done” looks like. A choice that rests on an assumption enters the shortlist as a check, not as an action. Choices that are not picked stay on the pairing sheet for the review.

9 Read back and close | 4 minutes

Two minutes: read back the shortlist with owners and dates, then the assumptions and who checks each one. Say when the group will review the shortlist. Two minutes: each person says or writes one sentence about what changed in their view of the subject, or passes.

Reference tables

Six rules that stop a SWOT becoming a list of opinions

Read the rules aloud in the opening and keep them visible during the session.

Rule	Words to say when it is broken
1. One subject	“Is that about the subject on the framing sheet? If not, I will park it.”
2. One sentence that someone could check	“What would someone look at to see that this is true?”
3. Evidence, or a named check	“How do we know? Give me a number, a date or a source, or tell me who we will ask.”
4. Control decides the side	“Could this team change it on its own? Then it is internal. Would it be true if we did nothing? Then it is external.”
5. No solutions in the grid	“That is a choice. Hold it for the pairing step. What is the fact behind it?”
6. Votes order the talk, the decider decides	“The votes show where to look first. The shortlist is decided by the person named on the framing sheet.”

Internal or external: the placing test

Internal: the team controls it now. External: it is outside the team’s control within the time horizon.

Quadrant	It belongs here if…	Often misplaced
Strength (internal)	The team does it or has it now, it helps the goal, and the team could lose it by its own choices.	A hope: “we will be good at this once the new system arrives.”
Weakness (internal)	It is the team’s to fix, and it holds the goal back today.	A complaint about another team. That is external.
Opportunity (external)	It is happening or planned outside the team, it could help the goal, and it would be true if the team did nothing.	An idea for action: “we could run more sessions.” Ask for the outside fact that makes the idea possible.
Threat (external)	It is happening or likely outside the team, it could harm the goal, and the team cannot stop it alone.	A weakness in disguise: “we have no backup trainer” is internal. The threat is the outside event that would expose it.

Four ways to pair an internal entry with an external entry

Pairing internal with external factors is often called a TOWS matrix (Heinz Weihrich, 1982). The names, questions and layout here are written for this kit.

Pair	Name in this kit	Question to ask	Example from the fictional team
Strength with opportunity	Use	Which strength lets us take up this opportunity?	S1 with O1: run the day 3 call practice in the practice environment.
Weakness with opportunity	Fix to gain	Which weakness could this opportunity help us fix, or must we fix to benefit?	W1 with O1: replace the day 2 slide walk-through with three timed tasks.
Strength with threat	Shield	Which strength reduces the harm of this threat?	S2 with T1: run two groups of 12 in the same week.
Weakness with threat	Fix first	Which weakness does this threat make worse?	W2 with T3: add an observed call on day 5 that needs everyone present.

Filled example: framing sheet

A fictional learning team. The team, the course and the dates are invented for this example.

Question	Our answer
The subject: one service, course, team or project	Welcome Week, the five-day onboarding course for new customer service advisers.
The goal: the decision or plan this SWOT serves	Decide what to change in the course before the January intake.
The time horizon: from when to when	From today, Wednesday 4 November, to the end of the January intake.
Who decides afterwards, and by when	The learning lead decides the shortlist in the room. Any request for money goes to the head of service by Friday 13 November.
Who is in the room, and who facilitates	Five people: the learning lead, two trainers, the course coordinator and one customer service team leader. A colleague from another team facilitates and does not vote.
Whose view is missing, and how we bring it in	New starters from the October intake: their end-of-course forms are on the table. The IT project lead: questions go to them after the session.
Out of scope: what we will not discuss today	Recruitment, pay and the choice of the new customer records system.
Evidence we bring: reports, forms, notes, plans	End-of-course forms, trainer notes, the attendance register, the IT project plan and the recruitment plan.

Debrief and next steps

Questions for reflection

- Which entry did we believe at the start that turned out to be an assumption?
- Which entry moved from one side to the other when we asked who controls it, and what did that change?

- Which choice came from a pair that nobody would have written as a single idea?
- What is missing from the register because the people who know it were not in the room?

Adapt the session

- For four or five people, one person takes each quadrant in the evidence round, a fifth person joins the fullest quadrant, and the group writes the pairs together.
- For a 75-minute version, send the framing sheet and the four prompts two days early and ask people to bring their entries with evidence. Cut the opening to 5 minutes, skip the silent writing and shorten the evidence round to 11 minutes.
- Online, share the workbook or one document on screen. People type entries in the chat or the document, the quadrant groups use breakout rooms, and votes go to the facilitator as three entry numbers in the chat. Cameras are optional.
- For quiet participants and people who use a screen reader, send the sheets as plain text a day early, accept entries in writing before the session and read every entry aloud with its number. Anyone may pass in any round.
- If the subject is large, such as a whole department, run one SWOT per service or course and compare the shortlists afterwards. One register with forty mixed entries is hard to pair.

After the session

Send the framing sheet, the register, the pairings and the shortlist within one working day. Each person who owns a check reports the answer in writing, and the entry then becomes a checked fact or leaves the register. At the review date, go through the shortlist, look again at the choices that were not picked and update the register with anything that has changed outside the team. Repeat the SWOT when the goal or the time horizon changes, not on a fixed schedule.

Questions people ask

What should a SWOT analysis template include?

Four quadrants are the minimum: strengths and weaknesses inside the team’s control, opportunities and threats outside it. A template that a team can act on also needs the subject and the goal, a column for how you know each point, a “so what” column and a place to turn the entries into a few choices with an owner and a date. This kit has a sheet for each.

What is the difference between a strength and an opportunity?

A strength is internal: the team does it or has it now and could lose it by its own choices. An opportunity is external: it is happening outside the team and would be true if the team did nothing. “We could use the new practice environment” is neither. It is a choice, and it belongs in the pairing step.

How do you turn a SWOT analysis into actions?

Pair one internal entry with one external entry and ask what you would do because both are true. Use a strength on an opportunity, fix a weakness that an opportunity makes worth fixing, use a strength to reduce a threat, or fix first a weakness that a threat makes worse. Then the decider picks up to four choices, and each gets an owner, a first step and a due date.

Where does SWOT come from, and is it a proven method?

The origin is uncertain. It is often credited to work at the Stanford Research Institute in the 1960s (Albert Humphrey) and to Harvard Business School authors of the same period. It is a way to organise what a team

knows, not a proven method: the result is only as good as the evidence behind each entry. It does not replace customer research, a risk assessment or a financial plan.

How is a SWOT different from a retrospective or a problem-solving workshop?

A SWOT looks at a position before a choice. The retrospective template and the lessons learned template look back at finished work. The problem-solving activities kit takes one known problem and finds causes and a test. Use a SWOT when the team has to decide what to change next and the problem is not yet clear.

What is included in the free and editable files?

The open PDF has the framing sheet, the silent writing sheet, the SWOT register, the pairing sheet, the shortlist, a filled example of the register, the pairings and the shortlist, and the 90-minute facilitator script. Subscribers also receive the editable Word file, an Excel workbook with a register that counts and ranks entries, a pairing sheet, a shortlist with days to each due date and filled examples, and a CSV of the workshop plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.