

SWOT AND PESTEL

/ Understanding your external and internal context for better planning and decision-making /

WHAT ARE SWOT AND PESTEL?

SWOT and PESTEL are analytical tools that help identify the key external and internal factors that should be taken into account in order to achieve success in a project or initiative. They are usually used together, and are applied in a group setting to support effective strategic planning, decision-making and action planning. SWOT and PESTEL are cost- and time-efficient means for highlighting key issues relating to the context of a project or initiative which, if not identified and addressed, could critically affect the chances of success. They also offer the benefit of framing these issues in a way that is easy for participants to understand and discuss.

REQUIREMENTS FOR SWOT:

- *Experienced facilitator*
- *Rapporteur.*
- *Flip chart with plenty of paper and marker pens.*
- *Optional: Laptop and projector.*
- *8 - 12 participants representing diverse relevant roles and ideally including decision-makers. (Alternatively, up to 40 participants if using subgroups; see Variations below.)*
- *1 hour for quick SWOT; 2 hours for normal SWOT, or up to a half-day SWOT workshop for major initiatives; plus preparation time.*

ADDITIONAL REQUIREMENTS, IF ADDING PESTEL:

- *1 - 6 persons with good research/analysis skills, to conduct initial research on the six PESTEL domains before the meeting and also participate at the meeting (they do count against the suggested limit of 12 participants).*
- *1 - 2 hours to review, expand and rank PESTEL inputs from research, before continuing with SWOT.*



WHEN AND WHY TO USE

SWOT: Turning around the order for better results

The term 'SWOT' refers to Strengths, Weaknesses, Opportunities, and Threats. Strengths and weaknesses are internal factors: they exist inside the organization (or within the partnership, if relevant to the project being analysed). Opportunities and threats are external: They exist outside the organization. SWOT is a widely used and fairly well-known tool; the method described here incorporates a couple of changes from the ordinary SWOT, intended to produce the strongest possible results.

SWOT has often been done in the order implied by the name: first examining strengths, then weaknesses, opportunities and finally threats. **However, it is recommended instead to first examine the external factors – opportunities and threats – and then proceed to the internal ones.** This helps keep a stronger focus on results, and helps you identify which threats are 'critical threats' (i.e. those that are compounded by corresponding weaknesses) and which opportunities are 'promising opportunities' (i.e. those that are matched by corresponding strengths). Those who have changed the order of work in SWOT, by examining opportunities and threats first,

often report being amazed at the improvement in the value of the SWOT process.¹

Any project/initiative that is to be assessed using SWOT must have clearly defined objectives which are well understood by participants. Clear objectives are a kind of lens, through which the various external and internal factors relevant to your project can be identified as Strengths or Weaknesses, Opportunities or Threats. If the objectives seem to be unclear, then have them clarified and agreed before embarking on a SWOT.

The SWOT framework can be thought of as a matrix. Here it is presented with external factors first.

	Favourable for achieving the objectives	Unfavourable for achieving the objectives
External origin	Opportunities	Threats
Internal origin	Strengths	Weaknesses

PESTEL: A powerful complement to SWOT

PESTEL, a complementary tool to SWOT, expands on the analysis of external context by looking in detail at specific types of issues that frequently have an impact on implementation of project/ initiatives. The term 'PESTEL' refers to the domains it considers: Political, Economic, Social, Technological, Environmental and Legal. PESTEL involves identifying the factors in each of these six domains that are relevant for the project being considered. A special focus of PESTEL is identifying trends. Thus it is helpful for thinking proactively and anticipating change, rather than being overtaken by it.

It is recommended to use PESTEL and SWOT together. PESTEL complements SWOT by

¹ For example, see Michael Watkins, "From SWOT to TOWS: Answering a Reader's Strategy Question", in Harvard Business Review online, <https://hbr.org/2007/03/from-swot-to-tows-answering-a-readers-strategy-question/>

identifying specific relevant factors (such as economic trends, social attitudes, technological developments, etc.) that are significant for the project being considered, and SWOT then classifies them as either Opportunities or Threats. The more complex your context or operating environment is, the more value PESTEL can offer, by identifying factors that would be missed by SWOT alone.

Applying PESTEL is fairly simple: Of the nine steps to do a SWOT described below, only steps 2 and 5 are done differently when using PESTEL. An extensive set of PESTEL questions is provided in Annex 2 (see below), to help participants identify more quickly and easily the relevant factors in each of its six domains. If you're short of time, you can just do a SWOT. But if time permits, then applying PESTEL and SWOT together results in a stronger analysis, a better understanding of the current situation, and the potential for improved decision-making.

Applications and benefits

SWOT (and, where possible, PESTEL) can be applied for the following purposes:

- ▲ Creating, or helping create, a strategic plan or an action plan when launching a project/initiative. This is perhaps the most common application of SWOT.
- ▲ Weighing the pros and cons of major decisions. For example, use them to help decide on whether to create or join in a new initiative, to establish a significant new partnership, to implement new methods or tools (technological or non-technological), to help plan a reorganization, to assess use of resources and decide on how to improve operational efficiency, etc.
- ▲ Reviewing positioning on an ongoing project/initiative at a key moments of reflection,

identifying needed change in the approach or methods being used, and making adjustments.

SWOT and PESTEL are flexible: They can be applied for planning or decision-making concerning an entire project/initiative, or alternatively it can be used to focus on specific stages or components of a project. For example, if you are working on an immunization campaign, you could address all the various programmatic aspects (supply and cold chain, any needed training of health workers, collaboration with government and partners, public communication, etc.) in a single SWOT, or you could break out the public communication aspect and deal with that separately from the other aspects.

Similarly, SWOT and PESTEL can be applied to large or small (but significant) projects or decisions. If time is very limited, or for small projects, do a quick SWOT in an hour (remembering to identify the Opportunities and Threats first, and then the Strengths and Weaknesses). With more time, or for projects/decisions with larger implications, do a full SWOT and PESTEL in about 3 hours, plus preparation time. With even more time, or for very significant projects/decisions, expand the time accordingly, up to a full day workshop.

For a simple issue or question, SWOT and PESTEL may provide sufficient basis for making final decisions or creating an action plan. For complex questions, SWOT and PESTEL will at least lay a solid foundation, at low cost, for any further in-depth research and analysis that may be required. Prioritization of the issues in a PESTEL and SWOT is typically quick and may need to be refined when dealing with a really complex challenge.

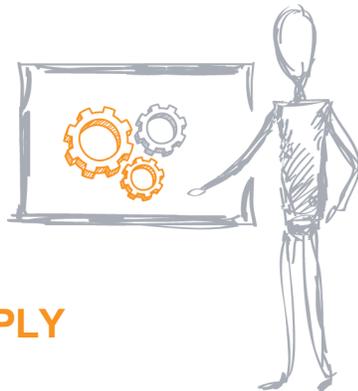
The fact that SWOT and PESTEL are group processes means that they also offer the following benefits:

- ▲ The breadth of perspectives in the group will make the analysis broader and deeper than what

an individual could produce in the same time, and will help overcome individual bias and limited viewpoints.

▲ The process will help get a team onto the same page by creating a shared understanding of the project context and key external and internal factors. SWOT participants often report being surprised by the views of others on even simple issues and challenges. It is best to surface those surprises early before they can impede effective action.

▲ The process will also start the key conversations that are needed to achieve project success. The connections and conversations can continue as needed after the SWOT concludes, throughout the duration of the project.



HOW TO APPLY

The following are the steps for a SWOT. The more time you have for the SWOT, the more time you should spend on the analysis and discussion steps (steps 5-9 below). If you are doing PESTEL, a little additional preparatory research will be needed before the session.

Prepare in advance

1. Prepare a clear, brief draft statement of the project objectives/decision to be analysed in the SWOT. The statement should consist of only a few sentences. If you already have a project plan or proposal that is longer than one page, shorten it for purposes of the

SWOT. You don't need to capture every detail: include only the essence of the project objectives and expected outcomes or of the decision that is under consideration.

2. Invite participants (about 8-12 for a normal SWOT) who will be directly involved in the project, or in the implementation of the decision. Share with them, in advance, the draft statement of the objectives and outcomes. Help the participants prepare for the SWOT in one of the two following ways:

▲ **Option 1: Assign some or all participants to conduct PESTEL research and to share their findings with you a few days before the event.** Assign responsibility for surveying factors in each of the six PESTEL domains: give each of the domains to one person, or split them among 2-3 people, or assign one person who is very familiar with the context to cover them all. The output of the PESTEL research is, for each domain, a simple list of the key factors with just enough information to clearly define each of them. This could be a sentence, or a brief paragraph. PESTEL research for one domain (political, or economic, etc.) could run anywhere from half a page to a few pages.

▲ **Option 2: Simply ask participants to think about threats, opportunities, strengths and weaknesses** before the event. Although not as powerful as PESTEL, this will still help the SWOT to be more relevant.

When you are ready to start

3. Convene the meeting and briefly describe the method. Ensure the rapporteur(s) are ready; their notes will complement the flipchart sheets that you will write during the meeting.

4. Confirm the group's understanding of the objectives and outcomes to be analysed in the SWOT, and which team (organization, partnership) would take action to implement them.

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5. Brainstorm the external categories (Threats and Opportunities):

▲ **If you used PESTEL, then its results should be the starting point.** Share the lists of PESTEL factors identified by those who carried out the PESTEL analysis (political, economic, social, etc.), by posting them all at once on flipchart sheets for all to see, or displaying them on PowerPoint slides. Ask other participants to complement the PESTEL research by suggesting additional factors; this helps take advantage of different knowledge among participants. Next, brainstorm each PESTEL factor as to what opportunities it offers and what threats it carries. Record the results on flipchart sheets. At this stage you are looking for lots of relevant ideas.

Once all the PESTEL inputs have been discussed, ask the group whether they can identify any additional Threats, and then additional Opportunities; you can prompt them using the questions in Annex 1 below.

▲ **If you did not use PESTEL, simply brainstorm the Threats and Opportunities, prompting participants using the relevant questions in Annex 1.** Look for lots of ideas; don't filter for importance yet. Use a sheet of flipchart paper (or even more than one) for each category.

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6. Next, brainstorm the internal categories (Weaknesses and Strengths), using the

corresponding questions in Annex 1 as prompts, and looking for lots of relevant ideas.

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7. Rank the factors (O, T, S and W) by importance. Remind participants that the importance is linked to the potential impact of the factor on the objectives and outcomes of the project or decision, and to the likelihood of such impact. Once all the categories have been brainstormed, you will have four separate lists. Post all sheets so that participants can see them. Then discuss them to rank the ideas by importance, and mark each idea with symbols to indicate the group's overall opinion, e.g. ++ for very important factors, + for ones with some importance, or 0 for unimportant factors. Keep the discussion informal; you can ask for a show of hands, but don't take written ballots for ranking. Or give all participants sticky dots with 3 different colours and have them assign their ratings to each of the ideas.

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8. Discuss how the highly rated items in the categories relate to each other. For example, a certain strength may relate to a certain opportunity, or a certain threat may be made more significant because of a certain weakness. This is easier if you have used PESTEL and discussed Threats and Opportunities first (because those factors will make the impact of various Strengths and Weaknesses more clear.

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9. Optional but recommended: At the end of the session, if your group has decision-making power, outline a short action plan based on your analysis and on the objectives of the project or decision. If your group is acting only in an advisory capacity, suggest a few plausible options for action. Or if your objective was to make

a yes/no decision, summarize your recommendation and reasons. Your action plan/ recommendation should:

- pursue opportunities;
- overcome, prevent or avoid threats;
- use or capitalize on strengths;
- overcome, minimize or compensate for weaknesses.

Follow-up

10. After the SWOT, prepare a written summary with decisions/ recommendations, based on the flipchart sheets and notes from the note-taker, and distribute it to participants, decision-makers and other relevant recipients

TIPS FOR SUCCESS



SWOT

▲ Don't make the subject of a SWOT too broad; for example, don't try to assess every aspect of an Office's or Division's work. Instead focus on specific, significant projects and decisions, and conduct separate analyses for each, as time permits.

▲ Ensure you have diversity among participants in a SWOT. A group composed of participants with diverse backgrounds and

different perspectives can identify more of the critical factors, more quickly, than can a homogeneous group.

▲ For every project, some opportunities and threats are obvious, but others are hard to see because they are still developing and will have their full impact in the future. The latter kind of opportunities and threats are more difficult to identify and properly assess, but are potentially the most significant of all.

▲ Although SWOT is an analytical exercise, its success depends on a flow of ideas from participants. Therefore try to establish a relaxed and participatory tone; consider using an icebreaker if team members don't know each other well (see Icebreakers elsewhere in this Toolbox).

▲ During the discussion, keep the focus on the objectives and expected outcomes of the project/decision, and how the various factors relate to the objectives.

▲ If you are doing a quick SWOT (less than 1 hour), then it is OK for the statements of external factors and internal strengths/weaknesses to be somewhat general (though they should always be accurate), and for the final ranking of the factors (step 7 above) to be done quickly and somewhat informally.

▲ If you are doing an in-depth SWOT (3 hours or more, including PESTEL) then get multiple perspectives by involving participants from diverse, relevant backgrounds. Involve team leaders and decision-makers in the SWOT; without them, you will run the risk of your analysis and

recommendations being ignored. Try to ensure that the statements of external factors and internal strengths and weaknesses are both precise and verifiable. Do the ranking exercise (step 7) thoroughly, so that the most significant factors emerge clearly.

PESTEL

▲ When assigning persons to do PESTEL research before the SWOT session, try to match the PESTEL domains with persons who have knowledge of those domains. (See Annex 1 for details of all six domains.) Thus a media expert would be strongest in the Social domain, a lawyer or someone with legal background in the Legal domain, etc. Those who do the PESTEL analysis should also participate at the SWOT so that they can explain and support their choice of factors.

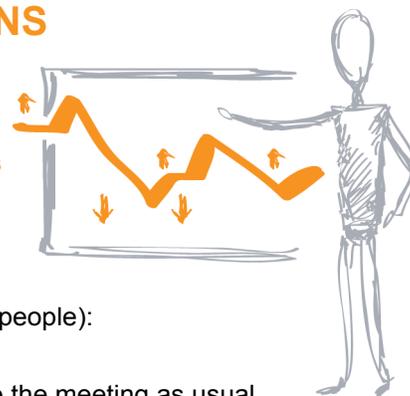
▲ To help identify PESTEL factors and trends, make use of any relevant and high-quality analyses that already exist from internal or external sources.

▲ Give weight to the factors identified in PESTEL according to your objectives; for example, if your objective involves increasing birth registration, then legal factors are obviously of prime importance; if your objective is community mobilization for sanitation, then social factors are critical; and so forth.

VARIATIONS

▲ Subgroups on the same issue.

If your group is large (more than 8-10 people):



1. Convene the meeting as usual and confirm the understanding of the objectives and expected outcomes. Then divide the group into 2-4 subgroups of up to 8-10 people, each with a facilitator, a note taker and a flip chart.
2. Have each group brainstorm each category (O, T, S, and W) for the objective/decision being discussed, in parallel. Encourage the small groups to be very informal and to generate as many ideas as possible. **Ensure that each subgroup uses the same methods for recording the discussions** (e.g. a flipchart, computer-based note-taking, group members writing on cards, etc.) This will greatly facilitate aggregating and/or comparing the outputs of the various groups.
3. Reconvene in plenary and gather all ideas from all groups, one group at a time for each of O, T, S and W. Through discussion, rank the items in each category, discuss how they related to each other, and if possible prepare an action plan/recommendation.

▲ **Subgroups on related issues/challenges.** If you have a few related key objectives, you can do parallel SWOTs on each of them, followed by a plenary session to summarize the key thinking from each. The plenary session may identify commonalities across objectives -- actions relevant for each objective, threats to each, weaknesses or strengths important for each, etc. -- which can then

be priorities for action as a result of their cross-cutting significance.

▲ **Icebreaker SWOT:** The simple and quick variant can be used as an icebreaker among people who will be working together in a planning session, but who may not know each other well. It is also suitable for kicking off a strategic discussion that will continue later, for example in other sessions of a longer event. Do not mistake an Icebreaker SWOT for a full analysis; it is at most a very quick introduction to the issues. To implement it, begin by simply introducing the objective under consideration in 1 sentence, at the event (no advance preparation required). Brainstorm and discuss only briefly – perhaps only for 5-10 minutes each – the relevant threats, opportunities, strengths, and weaknesses. To close the exercise, choose the top 1-3 items in each category by group vote.

▲ **Expanded PESTEL:** You can amplify the power of the PESTEL exercise in several ways:

▲ Assign additional persons to conduct research and identify the relevant factors. You may even engage consultants to do such work, if the project or initiative being considered is a major organizational priority.

▲ Add an additional group work session dedicated only to discussing and expanding on the PESTEL factors. This should take place before the SWOT analysis, so that it can feed in to the identification of Threats and Opportunities.

▲ **Online SWOT:** If your participants have adequate internet connections, you can convene a SWOT in a web conferencing tool (e.g. Skype for Business, Adobe Connect, GoToMeeting, etc.). Use audio, not text chat, to gather inputs, but prefer no video unless all participants have excellent bandwidth. Do not exceed 10-12 participants. Check periodically

with the rapporteur to ensure that the discussions are being captured. Online SWOTs are more challenging than the in-person version but may sometimes be the only option.



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Annex 1: Factors to consider in PESTEL

These lists of factors are intended to help inspire and guide your PESTEL analysis in each of the six domains: Political, Economic, Social, Technological, Environmental and Legal. Share them with those who will be conducting the analysis, and ask them to identify specific relevant examples in the operational context of the project or initiative that you are considering. Remember, all PESTEL factors have relevance only in the specific operational context. Therefore, identify the ones that could impact your project and focus your analysis on them.

Political

- Government policies: National, state/provincial, local, other.
- Government resource allocations.
- Stakeholder needs or demands.
- Lobbying/campaigning by interest groups: local, national, international. Influences/pressures from international actors, e.g. other governments, international organizations, etc.
- Armed conflicts.
- Changes in power, influence, connectedness of key relevant actors/groups.
- Expected direction of future political change: future policy prospects; upcoming elections and possible change in government (local, state, national) and its consequences; other relevant political trends.

Economic

- Economic situation: local, national, regional, global.
- Economic situation of specific relevant communities or population groups (including employment, taxation, mobility, etc.).
- Economic situation and prospects of any relevant industries.
- Infrastructure: local, national, other.
- Financial situation of key partners or other relevant entities.
- Availability of private sector resources relevant for the project/initiative.
- Expected direction of economic change: prevailing economic trends, trade and market cycles; expected economic interventions by governments and their consequences; other relevant economic trends.

Social

- Demographics and population trends.

- Health among populations.
- Education levels.
- Access to essential services.
- Public perceptions (of an issue, an initiative, an organization or other actor).
- Relevant customs, traditional beliefs, attitudes (e.g. towards children, adolescents, gender, etc.)
- Media views.
- Role models, celebrities, spokespersons.
- Knowledge, attitudes and practices of a particular population group (with regard to a relevant issue).
- Potential for knowledge exchange.
- Migration (which also has political, economic and legal dimensions).
- Major relevant events (upcoming or already happening) and cultural trends.
- History, to the extent that it affects social attitudes and perceptions.
- Factors in social identity, e.g. religious, socio-ethnic, cultural, etc.
- Dynamics of how social change happens in the given context.
- Management style, staff attitudes, organizational culture (within a major relevant organization).
- Expected direction of social change: broad trends in change of social attitudes (e.g. towards a relevant issue); other relevant social trends.
- Credibility of information sources or communication channels (e.g. media outlets, well-known individuals, etc.) among a target population. Reach of information sources/communication channels among a target population.

Technological

- Population groups' access to technologies.
- Patterns of use of existing technologies (which may be changing, e.g. evolving use of mobile phones).
- New technologies that could impact the context significantly, or that could be used to achieve objectives.
- Technologies and related infrastructure/manufacturing / importing requirements for an initiative to succeed
- Possible replacement/alternative technologies
- Potential for innovation
- Technology transfer, access, licensing issues, other issues related to intellectual property rights.
- Foreseeable technological trends: economic and social impact of adoption of existing technologies; rate of technological change; other technological trends.

Environmental

- Contextually relevant environmental issues: global (e.g. climate change), regional (e.g. flooding, droughts, etc.) or local (e.g. contamination of water supplies).
- Relevant environmental regulations or requirements (e.g. for assessing potential climate change impacts of specific activities, conforming to national or international environmental regimes, etc.).
- Environmental impacts of planned or ongoing activities.
- Climate, seasonality, potential impacts of weather.
- Trends or expected future developments in the environment.
- Geographical location

Legal

- Human rights (including but not limited to child rights and gender rights).
- Existing legislation having an impact on any relevant factors (economic, social, technological, environmental or other factors relevant to the issue), or affecting population groups relevant to the issue, or impacting the work of the organization or its partnerships.
- Pending or future legislation.
- International treaties/agreements, either existing or in preparation.
- Standards, oversight, regulation and regulatory bodies, and expected changes in these.
- Ethical issues.

Annex 2: Factors to consider in SWOT

These lists of factors are intended to help inspire and guide your SWOT discussion in each of the four categories: Opportunities, Threats, Strengths and Weaknesses. Share them with participants at your SWOT session, and brainstorm for examples relevant to the project or initiative you are considering.

If you used PESTEL, then the review of the PESTEL outputs will provide your first inputs into SWOT; in that case the lists of SWOT factors given here are supplementary, and should be used after the review of the PESTEL factors, to help identify any SWOT factors that were not captured through PESTEL.

Opportunities

Opportunities are external factors: They are found in the operational context within which the project, initiative or decision will be implemented.

- Events or trends that offer opportunities: Political (government policies, favourable changes in power/influence of relevant actors, political agendas), economic (rising prosperity, new economic opportunities or other favourable economic change), social (behaviour patterns, demographic change), technological (innovations, changes in technology use), environmental (favourable climate/weather), legal (upcoming legislation or treaties/international agreements).
- Relationships or partnerships that can be applied or drawn upon.
- Other actors that will likely play a role in the initiative/project under consideration; if they could support you, they represent potential opportunities.
- New information that has become available.
- Practices adopted by other organizations/actors in addressing similar challenges, which suggest opportunities.
- Potential funding sources.
- Possible efficiency gains from re-allocation of resources.
- Other initiatives, actions, projects or products that relate to the project/initiative under consideration.
- Include under opportunities the advantages, benefits or probable results that are offered by the project/initiative that is being considered in the SWOT.

Threats

Just like opportunities, threats are external factors in the operating context for the project, initiative or decision.

- Events or trends that could threaten the project/initiative or that put progress at risk: Political, economic, social, technological, environmental, legal.
- Risks and disadvantages that would be incurred by a given initiative/action under consideration: risks to staff and/or partners, to populations, reputational risk, financial risk, political risk, costs, additional responsibilities, etc. A complete risk analysis cannot usually be completed in a SWOT, but basic risks can be identified, or risks identified in a separate pre-existing risk analysis can be mentioned. Alternatively a more complete risk analysis could be called for at a later stage.
- Time, including disappearing opportunities, deadlines, unrealistic timelines.
- Other actors (harmful competition, contrary interests).
- Opportunities that would be foregone if a given initiative/action is undertaken.
- Other obstacles.

Strengths

Strengths are internal to the organization. Strengths include any kinds of capabilities or resources that the organization (and potentially any partners involved, and any stakeholders who are active participants in a development effort) can bring to bear, in order to achieve the desired result of the project, initiative, proposal, etc.

- Political: power, influence, connectedness, image and reputation.
- Access (to governments, partners, populations, etc.), reach, awareness.
- Presence on the ground.
- Economic / financial resources.
- Capital assets, infrastructure, equipment.
- Cost/competitiveness advantages.
- Skills, experience, knowledge (including academic or theoretical, and also know-how, i.e. practical or applied knowledge).
- Qualifications, accreditation.
- Data, especially if it is unique or hard-to-replicate.
- Allies, contacts.
- Dedication, leadership and drive.
- Cultural strengths.
- Geographical advantages (presence; other)
- Comparative advantages (with regard to other actors in the same context) in systems, processes, operational efficiency, flexibility, quality standards, other areas.
- Things your team/organization/partnership does well.
- Other noteworthy capabilities (technical, scientific, management, leadership, other) which the organization can apply.

Remember to take your operating context into account when identifying strengths and weaknesses. A strength in one context may be worth much less, or may even be a weakness, in another context; for example, available budget at the beginning of a budget cycle is worth more than the same amount of available budget near the end of a cycle.

Weaknesses

Similar to strengths, weaknesses are internal factors within the organization (or partnership) that would undertake the project/initiative.

- Existing gaps in capabilities or resources in the implementing organization(s). Refer to the list given above under 'Strengths' and note anything both relevant and lacking.
- Weaknesses which will take effect in the future, e.g. departure of key staff, expiry of funds, etc.
- Known vulnerabilities: things which the organization does not do well or struggles with. Every organization has such vulnerabilities; the idea is to be aware of them during the planning process.
- Other competing priorities (which may be core activities), pressures and internally imposed timelines that detract from available capacity.
- Relevant areas where a need for improvement has been identified (by management, by an audit, by an external evaluation, etc.)