

SWAT Team Guidelines & Questions

The basic SWAT Team concept is elegant in its simplicity.

Four executives from non-competing companies visit a peer CEO's company, ask questions of employees and managers, report back to the peer advisory group and – based on what they learn – make recommendations to the CEO whose company has been visited.

Although Strengths, Weaknesses, Opportunities and Threats (or, SWOTs) are confirmed or uncovered during the visit, the process is called a SWAT Team Visit, borrowing its name from police units made up of highly trained officers who are specially equipped to deal with unusual situations.

The benefits of the SWAT Team process include:

- Increased depth of knowledge and group bonding
- Team learning
- Uncovering hidden issues
- Sharper focus on key issues
- Higher levels of accountability

The beauty of the process is that value is received by the CEO being SWATed as well as the members of the SWAT Team who are making the visit.

The CEO being “SWATed” learns a lot about problem areas they may not have been aware of. And in many cases they get a reaffirmation of things they are doing right.

The members on the SWAT Team get as much or even more out of the process. They pick up new ideas and new ways of doing things they can translate into their own companies. Plus, it opens their eyes to what employees really think and say about the boss. They wonder, “Is that what my people are saying about me?” It encourages them to take a closer look at how they do things in their own companies and why.

The SWAT Team process is outlined on the following pages.

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Preliminary

Host of upcoming meeting is the SWATee.

Select four executives to serve on the SWAT Team.

Set a time and date for the SWAT Team visit.

Before the SWAT Team visit, SWATee's action list is:

Determine who is to be interviewed. Interviewing a cross section of employees (senior management, middle management and front-line workers) is key because perspectives will vary. No need to send this list in advance. The interviews can take a half-day, though the length of time is a function of the complexity of the issue and how many people are interviewed.

Provide current simplified financials to be sent in advance – detailed financials need to be available during the meeting.

Key Performance Indicators to be sent in advance, showing the organization's current situation versus its forecast. If financials are tracked graphically or in tabular form, provide graphs or tables.

Each member of the SWAT Team must review the information and be ready to hit the ground running.

SWAT Team Visit

The SWAT Team meets with the CEO – either the day of the SWAT Team visit or before – to understand concerns, background information and his/her expectations for the SWAT visit.

The SWAT Team interviews key people individually *without the CEO present*. Confidentiality *must* be guaranteed. Information collected must be presented as "coming from the group" and not from individuals.

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Key questions are shown on the last page of this document.

Tour the facilities – only if it's helpful to the process. SWAT Team members will be observing overall energy (or the lack of it), employee interaction, organization of work spaces, cleanliness of facility and work spaces, communications (info on walls, in break rooms, on TV monitors, etc.).

The SWAT Team should focus on the root cause of the problem, which may be (and probably is) very different from the problem indicated by the CEO who's being SWATed.

Diagnosis

Following the completion of the interviews, the SWAT Team members meet immediately among themselves to share information and prepare detailed recommendations for the CEO whose company was SWATed.

Categorize the information into two basic categories: *What's working well and Opportunities for improvement*. Compile a brief (one-page) report that the SWAT Team can use to focus its thinking and then present to the member.

The team debriefs with the CEO – either on-site or off-site – immediately while the input is fresh and presents a proposed action plan to the CEO.

Action & Accountability

Following the presentation of the What's working/Opportunities list, the CEO responds by committing to take action on the top one or two issues reported by the SWAT Team.

At the next regularly scheduled group meeting, the SWAT Team leader informs the entire group on the recommended actions. The member commits to reporting back on action taken and progress.

To ensure accountability, actions committed to by the member are recorded in the Memory Jogger.

Member reports progress against these commitments at subsequent meetings until the issue(s) is complete.

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