

SWOT Analysis Template *for Insurance Agents & Agencies*

Use this template to analyze the current strengths, weaknesses, opportunities and threats of your insurance agency's current marketing program. Review your competitive position against insurance agents in your area, your target markets, target audiences, current messaging, and the maturity of your offerings.



Strengths

List your strengths as an agency. They can be tangible or intangible strengths such as brand attributes or members of your team.

Weaknesses

List your weaknesses. Figure out what holds your agency back, such as finances, organization, or a shortage of people.

Opportunities

Examples of opportunities are an inpouring of leads, or innovative ideas that your agency wants to pursue this year.

Threats

This includes anything that can be a risk to the agency or that can hinder its likeliness of success or growth.



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Use this chart to help you identify strategies that will address your weaknesses and threats, and also how you will use your strengths and opportunities to have a successful year.



	Opportunities	Threats
Strengths	<p>Strength-Opportunity Strategies Which of your agency's strengths can be used to take advantage of the identified opportunities?</p>	<p>Strength-Threats Strategies How can you use your agency's strengths to minimize the threats?</p>
Weaknesses	<p>Weakness-Opportunity Strategies What steps can you take to minimize your companies weaknesses using the identified opportunities?</p>	<p>Weakness-Threat Strategies What steps can you take to minimize your companies weaknesses and avoid the threats?</p>