Executive Summary

Executive summaries are created to provide a brief summary of a larger document like a proposal, a report, or a business plan. The executive summary is typically the first document of the body of a report or proposal, and it should function independently of the larger document. **The importance of the executive summary cannot be overstressed.**

Purpose and Audience: The executive summary is a document meant to **persuade** your audience, which are decision makers, to read the proposal, report, or plan—it is a sales pitch or a hook to get the audience members interested in the project that you are either proposing or the recommendations that you are offering.

Goals of the executive summary:

- To balance your purpose with the customer’s needs and to demonstrate that you understand his or her needs.
- To recommend the solution and explain its value.
- To address the reasons why your company is the best for the job.

Formatting the Executive Summary—divide the summary into two main sections: Background and Findings and Implications.

Section One—Background: This section can contain one or more paragraphs. It should include a very **precise statement of purpose** (the point of the proposal or report) followed by a brief explanation of the problem or need. In a new paragraph, move from the explanation to a summary of the methodology or strategies. If you are proposing or recommending a new product, you would use this opportunity to explain what was wrong with the old product. (It is a good idea to keep your executive summary’s information in the same order as the proposal or recommendation report.) You essentially will provide the scope of the proposal, report, or plan.

Section Two—Findings and Implications: In this section, you will include any information in order of importance. You will design this section to include a brief description of costs and benefits and add the expected dates of completion. In addition, you will write a full paragraph that summarizes the conclusions, any recommendations, and any deliverables associated with your conclusions. Divide the conclusion and recommendations into two separate paragraphs.

Language and Length: 1) use formal language—avoid technical or figurative language; 2) follow the formula of the summary being ten percent of the total pages of the proposal, report, or plan; and 3) create the summary as a document that begins and ends as its own document—it can stand alone.

Additional Information:

- Avoid jargon filled language—some management staff may not understand the professional language, so if you use it, define the word.
- Use typography to organize and highlight your information. Divide the sections of the summary into main headings. For long lists or sentences that contain multiple clauses or phrases, use bullets. Bullets and headings will make the summary much easier to follow.
- Place the executive summary at the beginning of the body of the document.
- Spell out acronyms and any unusual symbols—again, consider your readers.
- Do not add information that is not in the original document.
- Write a clear and concise summary, but do not create a shorthand document. Use a variety of sentence structures and implement the use of transitions.