How to Write an Executive Summary That Gets the Job Done

The executive summary condenses the major points of a larger document, usually a proposal or a business plan. Here, we discuss the considerations and steps to writing one.

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Picture this: You’re in a bookstore, and you come across a cool-looking book. Great title. Looks like somebody cared enough to make the cover look good, too. There’s just one thing, though. You don’t know who the author is.

Should you take a chance on him? Will the book be worth your time and money? To find out, you start reading the description. “Nah,” you tell yourself a minute later, “I’ll pass,” suddenly visualizing the piles of crime novels sitting on your bedroom floor still waiting to be read.

Now imagine that instead of a contract employee deciding whether to buy a book, you’re an investor looking for a project to finance. You pick up the first file in a stack on your desk. Instead of the blurb on a hardback’s dust jacket, you go over the executive summary.

Will you want to know more about the project? Or toss the file where it will never be seen again?

The answer will largely depend on what the executive summary says.

Overview: What is an executive summary?

An executive summary condenses a much longer document and conveys its findings, takeaways, and recommended action plans. It often appears as the introductory section of a research study, white paper, or business plan. In project management, it
accompanies documents such as a project proposal, statement of work, or project charter.

Usually 1-4 pages long, depending on the size of the document it’s based on, it provides readers with an overview of the major points so they don’t have to read the entire material.

As is characteristic of summaries, the executive report summary is usually the last to be written and the first to be read. However, there is no rule saying it has to be written last. You can, of course, write it first and use it as a loose outline to be refined later when your project proposal or business plan is done.

Sometimes referred to as the management summary, it’s also the most frequently read section of a document and, in some cases, the only portion an executive or investor might read.

So if you’re looking to boost your business budget or secure funding for a project that’s tied to a major business development initiative, treat the executive summary report as your elevator pitch, the hook to lure your target audience into learning more about your project, business plan, or proposal.

How to write an executive summary

What you include in an executive summary will vary depending on the content it covers. For example, a startup plan may contain a description of your product or service, financial projections, key business metrics such as revenue growth, and your funding request.

A project proposal executive summary may provide an overview of the project scope and constraints, a summary of the project resources, a high-level explanation of the change management plan, a description of the major deliverables, and so on.

So think about the type of information your target audience would be interested to know in the few minutes they’ll allot to your executive summary. Also, you may sometimes be required to follow certain formatting guidelines, so review any instructions relating to length and overall format.
The steps below will cover the key components to include when writing an executive summary for a proposal.

**Step 1: Start with an attention-grabbing opening**

Open with a bang. Capture the client’s attention right out of the gate. You do that not by talking about yourself. Talk about them and the issue they’re trying to address.

Here’s an example executive summary format for your opening:

*Firefly & Co. is a brand poised to reach great heights in the plus-sized women’s clothing industry. High-quality, reasonably priced basic wardrobe staples — you can’t go wrong with that! Especially with Firefly’s ethical and sustainable production practices.*

*Evidence of Firefly’s growing clout is its ever-increasing social media following. In just less than a year, it has gained over 1 million followers on Facebook and Instagram. While that is an accomplishment in and of itself, what Firefly fails to leverage are the benefits of an e-commerce store.*

**Tip:** Be concise and direct. Build a solid case, and do so in a captivating way.

**Step 2: Define the problem**

Clearly state the problem or goal your proposal aims to address. You want to assure the client or sponsor that you fully understand the situation.

Here’s an executive summary example defining the problem:

*All purchases are currently done in physical stores. This limits sales potential and the possibility of gaining new customers. With the upcoming launch of Firefly’s summer bag collection, there’s no better time than now to step up its online presence.*

**Tip:** Be very clear about the business need behind the project. The focus here is the client and their pain point, not you or your company — not yet, anyway.

**Step 3: Describe the solution and expected outcome**

Next, briefly explain the solution you’re proposing. Then, give them a mental picture of what their business would end up looking like once their problem is solved. You want to
touch on the business benefits of the completed project, which will generally come in the form of:

- **Money**: Better sales numbers, more cost savings, better use of ad dollars, more loyal customers, etc.
- **Time**: More time for other value-adding initiatives
- **Authority**: Better brand name recognition, industry leadership
- **Efficiency**: Simpler, more streamlined processes

Here’s an example of an executive summary describing the solution and expected outcome:

All this can be done with Shopify, a full-service e-commerce platform that provides retailers with an easy-to-use interface for creating professional-looking websites. It comes with all the features they need to manage product listings, inventory, sales, and customer information. It even offers customers different ways to pay — debit or credit cards, mobile wallets, and more!

These features can better translate Firefly & Co.’s social media success into profits. With a Shopify store, your customers won’t always have to travel to your store to get the Firefly essentials they need.

**Tip**: Keep things high level while still giving readers something to be excited about.

### Step 4: Provide evidence that you can deliver

This is where you briefly talk about your expertise and whether you’ve done any similar projects before — your qualifications, essentially. You want the client to know that you or your team can deliver on time and within budget. If you can, include relevant figures to highlight your ability to get things done.

Here’s an executive summary sample offering proof of your expertise:

We, at Wildling Creatives, have used Shopify in multiple projects, and most of our clients have seen growth in sales by up to 50% within six months of integrating their brick-and-mortar store with an e-commerce site.

We’re a team of handpicked professionals with a combined 30 years of experience in e-commerce marketing. We’re certified Shopify experts, and with our eyes for good design, web
development skills, and expert knowledge in business and e-commerce, we've been helping brands like yours create and improve their online shopping presence for years.

**Tip:** Talk about your strengths, but never lie. Make sure the numbers you include are accurate. If you haven't already, use [project management software](#) for easier tracking and retrieving of key [project management metrics](#) such as return on investment and profit margin.

### Step 5: Include a call to action

Explain why they should work with you and what they can achieve by doing so. Your call to action can also include your contact information, in case the executive has a question.

Here's an example:

_E-commerce is the way forward. Done right, an unprecedented sales boom is just around the corner._

_By partnering with Wildling Creatives, not only will Firefly & Co. significantly boost local sales and improve brand recognition, but it will also open its doors to international customers. We've done it for swimwear superstar Bonnie Smith Swim Co., and we're confident we can also turn Firefly & Co. into the global success it's meant to be._

_If you're ready to take the next step, this proposal outlines in more detail what you can expect and how we'll do it. If you have any questions, I'd be happy to personally take your call at (55) 555-5555._

**Tip:** The goal of an executive summary is more to sell than describe, so this is where you try and close the deal.

To get a better sense of how different executive summaries look, here are templates you can download from [Microsoft](#), [Smartsheet](#), [PandaDoc](#), and [Examples.com](#).
Considerations before you submit your executive summary

Now that you’ve written your executive summary, you want to give it a run-through before you send it off to investors, clients, or potential partners. Be sure to check for the following:

1. Length

An executive summary should be brief, usually just one or a few pages long. It cannot be comprehensive. If your reader has questions, they can read the details in the proposal or business plan. As a rule of thumb, the length of your executive summary should be between 5-10% of the full report or proposal.

2. Language

Avoid jargon. Use language your target audience understands. Writing for medical experts will be vastly different from writing for people in finance.

3. Content

Discuss the major points in the same order as they appear in the full document. Refrain from introducing information not found in the proposal. And, of course, edit and proofread. You don't want any typos or errors in your executive summary.

4. Format

Check if there are any formatting guidelines to follow. Otherwise, structure your executive summary in a way that’s easy to skim. Instead of long blocks of text, use bullet points to break down complex information, headings/subheadings to organize topics, and even images to enhance the reader’s understanding of the summary.

Also, it’s a good idea to get someone to critique your executive summary to see if there’s anything you’ve forgotten to include.
Making your executive summary work

A project goes to the **project planning** stage because the client or a body of decision-makers believes it can solve a problem. But before that, the project manager or service provider writes a proposal, which generally takes time to write. Surely, you don't want all your efforts to go to waste.

With a well-written executive summary, you get to highlight all the good points of your proposal and entice your target audience to take action.

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