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Writing@CSU Writing Guide

Executive Summaries

Executive Summaries are much like any other summary in that their main goal is to provide a condensed version of the content of a longer report. Think of an executive summary as a cover letter for your report. It needs to give a recommendation based on the key findings of the report.

The purpose of an executive summary is to provide a concise and accurate summary of a larger document, or multiple documents, for an executive who most likely does not have the time to read the original report. It should be no more than 5-10% of the full document and be written in the same order as the plan laid out in the document.

Accuracy is essential because decisions will be made based on the summary by people who have not read the original.

Processes for Writing an Executive Summary

Executive summaries are typically written for longer reports. They should not be written until after your report is finished. Before writing your summary, try:

- Summarizing the major sections of your report. You might even copy text from your report into the summary and then edit it down.
- Talking aloud or even tape recording yourself summarizing sections of your report.

Questions to Ask Yourself as You Write

- What is your report about?
- Why is it important?
- What is included in the report?
- What is included in each section?

Elements of an Executive Summary

Key Elements of an Executive Summary

- Summary of the report
- Background information of report
- Report's process
- Results and conclusion of the report
- Recommendations based on the report and justification for the recommendations

Other Elements of an Executive Summary

- Accurate but *specific* details only as decisions will be made based on your summary alone
- The Executive summary should have the same information and terms /concepts as the original report to prevent confusion
- An Executive summary should include any project milestones noted in the report

Summary Statement

A summary statement is going to vary based on who the audience of the executive summary is. Potential types of summaries are: special use summaries, general summaries for publications and listings, summaries for business loans and business allies, summaries for investors, etc. Because of the variety of executive summaries, considering the audience of the summary is key.

For example a special use summary or general summary will be more market focused to generate an inquiry. Executive summaries for business loan or investors will be more number-focused. They will want to see growth and growth potential.

The key elements contained in the summary:

- Summary of report
- Backgroundn of information of the report
- Report's process
- Results and conclusion of the report

Elements to consider in the summary:

- Facts that generate interest
- Call to action
- Follow up information (phone number or website)
- Business history
- If asking for funding, how the money will be used to benefit the business
- If the summary is for an investor, brief description of the problem your business solves, how, and why you're in the best position to offer the solution—proprietary technology or special market position
- Recent milestones and key milestones for the future—revenues or product users
- Track records and backgrounds of team members

Recommendation

After beginning with a summary statement of your findings, the executive summary should go on to provide a specific recommendation for action geared toward your audience. After summarizing the entire article and/or research report(s), an executive summary ends with a one or two line recommendation for action.

Simple Formula

Executive summaries frequently make use of transitional phrases to encapsulate the preceding information in the same sentence as the recommendation. The format can almost be envisioned as a formula:

[transitional word] + [concise statement of information provided in summary]. I recommend that [corporation, office, person in question] do [recommendations].

Example

Due to the cost of parking, students may not be able to park on campus. I recommend that Colorado State University create initiatives to encourage carpooling.

More Complex Recommendations

In other cases, the recommendation might be complicated enough to justify a summary of causes for the recommendation. In this case, the recommendation paragraph usually begins with a summary of how the writer reached the recommendation.

Justification

Finally, an executive summary provides an analysis and/or justification for the proposed action in terms the audience will consider important. In many cases, this might involve a monetary analysis, but actions can be justified many ways, depending on the concerns of the audience and the topic of the report. A recommendations justification is usually based on a reference to material already provided in the summary.

Example of an Executive Summary

Susie's Cookies began as a small business in Cleveland, Ohio which has expanded to include 45 stores throughout the Midwest. Plans have already been instituted to expand sales nationwide, using the same "mall-concept" marketing strategy which has proven successful in the Midwest. Despite these plans, Susie's Cookies may be in danger of bankruptcy.

Susie's quadrupled its sales in the last two quarters, realizing a profit of \$750,000 in the current year, an increase of \$250,000 over the previous year, due to its increase in advertising. To realize equivalent sale figures nationwide, however, it is

projected that advertising costs will increase by 200% for the first two years of the national expansions. Further, construction costs for the new stores are estimated to be 20 million dollars.

The result of increased advertising and construction costs will put a substantial debt burden on Susie's cookies, an estimated \$750,00 to 1 million a year. Given that sales did not reach current levels in the Midwest until the 45 stores had been operating for five years, projected sales nationally will not cover expansion costs. As a result, Susie's Cookies is likely to show a loss of almost \$2 million for at least the next five years.

Due to the high advertisement and development costs of national expansion. Susie's Cookies may not be able to continue doing business in the future Therefore, I recommend that Mrs. Field's does not participate in the hostile takeover under consideration because the threat of competition will not be realized.

Citation: Please adapt for your documentation style.

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