



The 8 steps to create an effective executive summary

A Comprehensive Guide

What is an Executive Summary?



Common Misconception

The word “summary” can be misleading, and this is the first mistake people often make when it comes to writing their executive summary. They think that this is where you explain the entire proposal in 250 words

What is an Executive Summary?



The Right Definition

A concise, informational, persuasive piece of writing with the principal purpose of convincing the customer that your offer is superior to competitor offers

Where and how do you present the executive summary?



An Executive summary is generally a standalone section at the front of a proposal

Where and how do you present the executive summary?



The main purpose executive summary is to sell your solution to the client's problem

Where and how do you present the executive summary?



It must be clear and persuasive, outlining why the client should choose your company

Where and how do you present the executive summary?



It should be specific and focus on results

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Why do you need an Executive summary?

Helps evaluators understand the key messages in your proposal

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Why do you need an Executive summary?

Improves your probability of winning

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Why do you need an Executive summary?

Demonstrates that you have a clear grasp of the customer's vision

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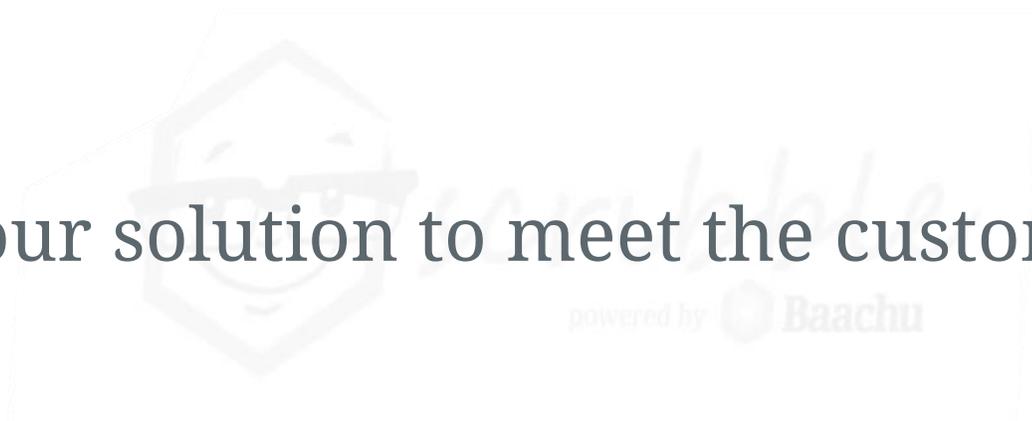
Why do you need an Executive summary?

Highlights your understanding of the customer's explicit and implied needs



Why do you need an Executive summary?

Showcases your solution to meet the customer's needs





Why do you need an Executive summary?

Gives you a chance to present how much value you offer in comparison with your competitors

Key questions you must ask to build your Executive summary



What are the **customer's problems?**

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Key questions you must ask to build your Executive summary



Why did these **problems arise?**

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Key questions you must ask to build your Executive summary



What results do they want to **achieve by solving the problems?**

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Key questions you must ask to build your Executive summary



Which outcome or result is the **most important**?

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Key questions you must ask to build your Executive summary



What solutions can you, or your **competitors, offer?**

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Key questions you must ask to build your Executive summary



What results will each **solution produce?**

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Key questions you must ask to build your Executive summary



Which is the **best solution** and why?

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How to write an Executive Summary?



The Opener: Capture their attention

This is the time to hook them in — get them excited about what they're going to read next



How to write an Executive Summary?

The Need: We get it

Demonstrate your grasp of the situation. Talk about how the client will benefit from solving the problem - what will change, the positive outcomes, the results



How to write an Executive Summary?

The Solution: We've got it

Explain the solution you're proposing and why it will work. Provide the client with a sense of relief and get them excited about the result



How to write an Executive Summary?

The Evidence: We can do it

Talk about why your company, your team, or your product is not only willing to take this challenge on, but you're qualified to do so



How to write an Executive Summary?

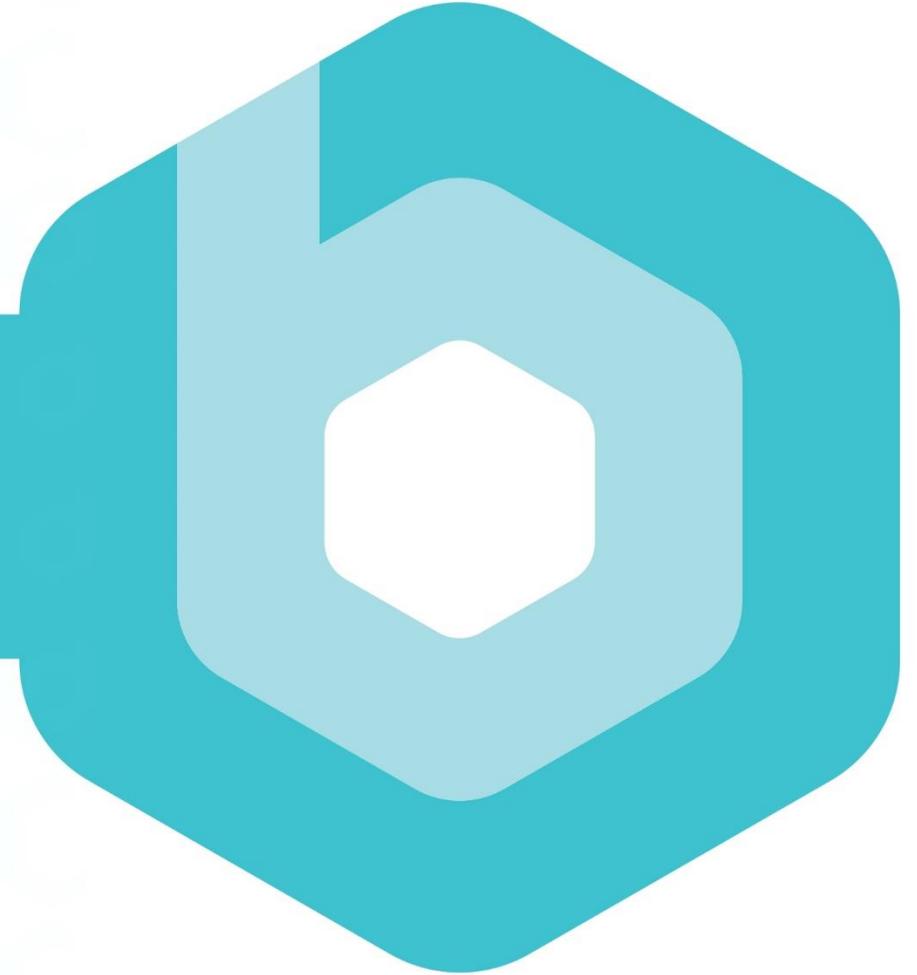
The Call to Action: Let's do it

The purpose of the executive summary is to sell. It is now time to close the deal

Make the client feel that you are the right choice

Talk about why you want to work with them — a little flattery goes a long way — and about how, as partners, you will be successful

8 Steps to build an effective Executive Summary





1. An executive summary is non-negotiable

It helps you connect your solution to the customer's vision

It allows you to identify the customer's needs and clearly state how you can meet them and what solutions you have for them

It allows you to provide proof for your claims and how you are worthier than your competitors

Allows you to summarize what is sometimes a lengthy and technical proposal

2. An executive summary should always be customer-focused



An executive summary should follow the main customer focus principles

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3. An executive summary always use your existing sales strategy



This ensures that you avoid the risk mixing your message with your customer

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4. Organize the content to be clear and persuasive

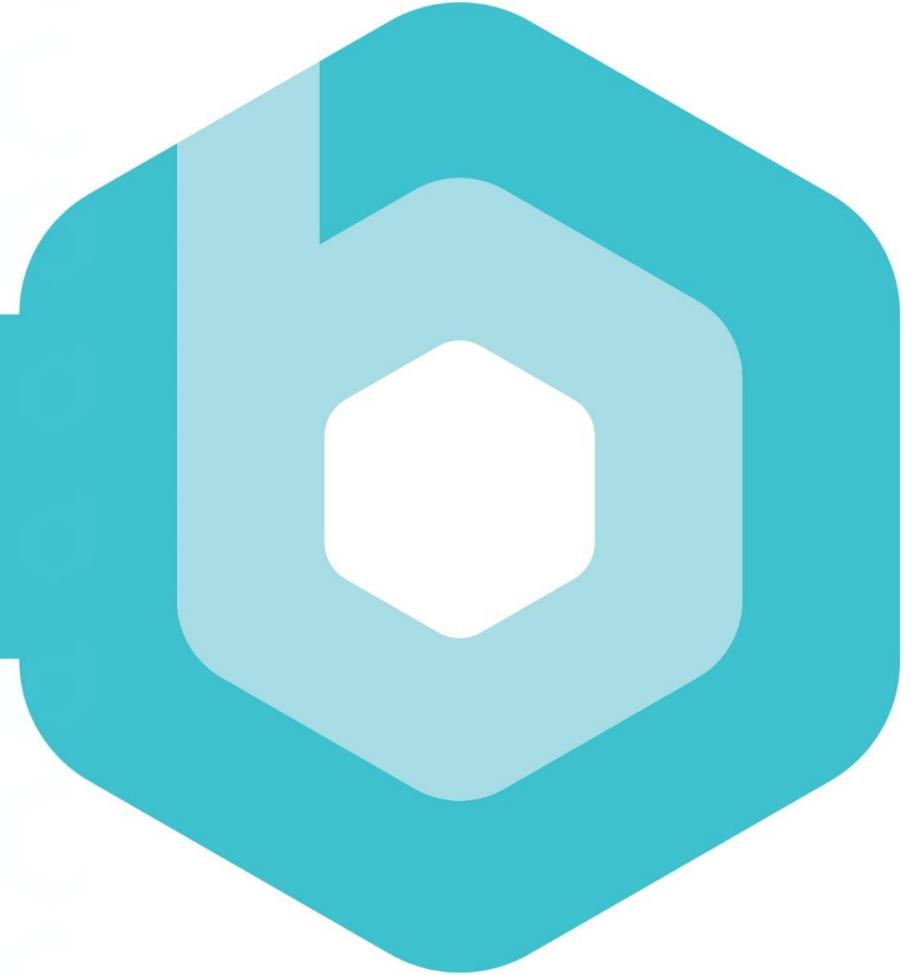
The **four-box template** is one of the best methods to organize content clearly and effectively and make sure that your customer is delivered a successful and concise message



What is the Four-Box Template?

The **four-box template** is one of the best methods to organize content clearly and effectively and make sure that your customer is delivered a successful and concise message

What is the Four-Box Template?



Box 1: SUMMARY



Identify the customer's vision, goals, and problem-areas

Introduce your solution aligning with the above

Build a strategic theme showcasing your theme and introduce it here

Box 2: INTRODUCTION



List and prioritize your customer's requirements

Showcase the key points and risks here

List the customer hot buttons in this box

Box 3: BODY



Expand on the above customer hot buttons in this box

Present solutions emphasizing on the benefits and results

Box 4: REVIEW



Justify why you are the right choice in comparison to other competitors

Highlight the difference your solution will make for the customer's business

Visuals and proof of claims can be included

Restate your overall strategy and summarize your solution



Four-Box Template sample

<i>ShipleysAssociates*</i>		Four-Box Template	
Box 1: Summary		Signal your purpose in a clear heading. Summarize the essence of your message. State what you want the reader to do, know or feel.	
Theme Vision			
Box 2: Introduction		Preview organization of the document. Organize around the points most likely to influence the reader.	
Introduce Hot Buttons			
Subordinate Topics			
HB # 1			
HB # 2			
HB # 3			
Box 3: Body		Provide convincing details for the reader. Maintain the same organizational scheme introduced in Box 2. Consider visuals to help convey your message.	
Topic:			
HB # 1	HB # 2	HB # 3	
-Solution and benefit	-Solution and benefit	-Solution and benefit	
-Proof	-Proof	-Proof	
-Visual	-Visual	-Visual	
Box 4: Review		Summarize the reasons the reader should do, know, or feel what you want. End by clearly stating the next realistically achievable step.	
Summary: Preview Proposal, Next step			
(contact #, email, date to contact, etc.)			

5. Take the four-box method and expand it into a multi-page or single-page draft



The four-box method can be expanded either into a single-page or multi-page draft, depending on how important it is to the customer

6. Always formulate your executive summary using proven methods.



Always choose executive summary methods which have been cultivated through decades of consulting and organization experience

Things like customer focus, draft reviews with customer coach and visual techniques are tried, tested and successful techniques

7. Follow sound, accepted writing guidelines for your executive summary



These guidelines are widely available and include things such as:

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7. Follow sound, accepted writing guidelines for your executive summary



Clear proof of claims

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7. Follow sound, accepted writing guidelines for your executive summary



Clear statements

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7. Follow sound, accepted writing guidelines for your executive summary



Organized customer-focused frameworks

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7. Follow sound, accepted writing guidelines for your executive summary



7. Follow sound, accepted writing guidelines for your executive summary



Stand-alone summaries

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7. Follow sound, accepted writing guidelines for your executive summary



Brief and comprehensive structures

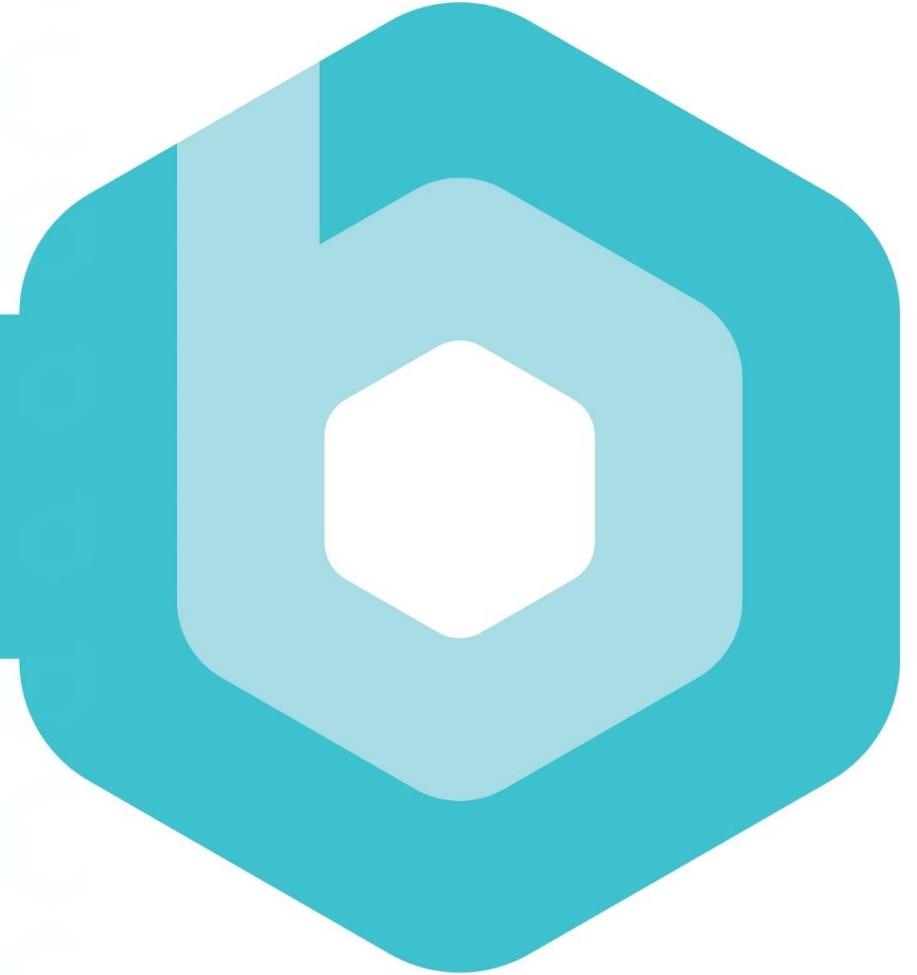
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8. Always follow the accepted, abbreviated practice when preparing the executive summary on short notice



Use the abbreviated procedure when forced to draft an executive summary .on short notice

The Do's and Don'ts of the Executive Summary



The Do's of the Executive Summary



Do focus on your client

Do proofread and edit

Do mention your client's company name

Do use plain language

The Don'ts of the Executive Summary



Don't make it too long

Don't use jargon

Don't use overly technical language

Don't talk about your company history

Sample : Baskar – can you give a real one from your end?



HippieStix* Shopify eCommerce Proposal



THE OPENER

HippieStix sells what is arguably the coolest line of artisanal, sustainably-sourced chopsticks in the world. They're so cool that they make every kind of food taste better, not just General Tao Chicken. The challenge is that as awesome as HippieStix are, you've got a static website that merely shows photos of your product line and requires customers to pick up the phone and place orders manually.



THE NEED

As you're well aware, placing orders manually is not sustainable. It is severely limiting your potential for sales, and it's negatively affecting how your customers experience the HippieStix brand. You need an ecommerce store so your customers can easily buy their HippieStix from you directly — at any time, from anywhere, however they want. This is the only way to grow your business online.



THE SOLUTION

Lucky for you (and 100,000 other retailers around the world) there's Shopify. Shopify is an awesome hosted ecommerce app that empowers retailers large and small with their easy-to-use, easy-to-manage, customizable online store and secure checkout. Shopify gives you control over your look and feel and allows you to add products, manage your inventory, track sales, and more. It's hassle-free ecommerce, allowing you focus on improving other parts of your business. We'll focus on maximizing Shopify's features to help drive HippieStix revenue and improve your customer experience. We'll include powerful search and categorization so customers can easily and quickly find what they're looking for. We use best practices so that product pages convert users to add more items to their shopping cart. And then, most importantly, we guide people down the conversion funnel to complete the checkout process.

With this solution, we aim to grow your monthly sales by 40% at the end of 6 months. Cha-CHING!



THE EVIDENCE

Here at SmartiePants Design, we're proud to be Shopify experts. That means we're among an elite group of developers who have been trained and approved by Shopify to integrate their app. In terms of design and development, we know them up close and personal. Our Shopify status only enhances our already extensive knowledge of ecommerce trends, functionality, customer behaviour, and design. We've helped many businesses transform an underperforming site to an all-out sales boom just by improving their online shopping experience.



THE CALL-TO-ACTION

We love working with companies like HippieStix who embrace the changes required for growth while still honouring their brand values and customer loyalty. With this attitude, a partnership with SmartiePants Design can transform HippieStix from mom and pop chopstick shop to flourishing global online business in a way that is manageable, sustainable, and profitable. We've done it for superstar brands like Dollar Shave Club, and for soon-to-be star brands like Rum Runners Rum Cake Factory.

If you're ready to increase your monthly sales by 40% in 6 months, we're ready to take you there.

This proposal outlines in more detail how we'll do it, and what you can expect along the way. But your biggest expectation should be one of success.

Let's make it happen. Let's get HippieStix on the tables of discerning food lovers around the world.

**all company names and details are entirely fictional*



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