

Effective Writing Center – Student Resources

Executive Summaries

As its name suggests, an **executive summary** summarizes, or reviews the main points of, a longer document or report for a reader that does not have time to read the entire report. An effective executive summary **analyzes and summarizes** the most important points in the paper or report, and will often make a **recommendation** based on the analysis. Executive summaries are “stand alone” documents that are almost always read independently of the reports they summarize.

You may submit an executive summary as part of an assignment, and your instructor will likely read the summary *and* the paper or report. It’s helpful, however, to keep in mind that executive summaries should inform and influence people who will *only* be reading the executive summary. Most of the time, you will be summarizing a paper or report that you wrote, but there may be times when you will write an executive summary of another author’s report or article. Often your instructor will specify the length of your executive summary, but 10% of the document that you are summarizing is a good rule of thumb. For example, a ten-page paper or report would require a one-page executive summary.

When preparing to write an executive summary, ask yourself the following questions:

- **Who will read your executive summary?** Sometimes your executive summary may have an “intended” audience: your professor might require you to write it for a CEO, department head, or supervisor, for example. On other assignments, your audience won’t have a specific identity, but always keep in mind that the reader of an executive summary needs to know all of the important information in the main document *without* reading the actual document. Even if you know that your instructor will be reading everything that you submit, write the executive summary as a “stand alone” document.
- **What is the main document’s main topic, theme, or idea?** Most reports have a “thesis” or central point that they are seeking to communicate. Try to sum this up in two or three sentences. If you are having trouble with this, imagine that someone has asked you, “what’s this report about?” and that you have to explain it in only a few sentences. Once you’re able to *say* what the main idea is, it will be easier to write it.
- **What is the “purpose” of the main document?** Most reports and papers have a reason, or a goal (beyond just fulfilling an assignment). Perhaps the report supports a change of opinion, new direction, or course of action. Try to summarize this in two or three sentences.
- **Are there sections, or divisions, within the document? If so, which ones are the most important, or most crucial, to an understanding of the document?** The kinds of documents that require executive summaries usually contain sections, or subtopics that support the main topic. There may even be headings that indicate what the sections will discuss. Try to decide which ones are necessary to an understanding of the issue at hand, and which ones can be left out.
- **Does the document make a recommendation or suggest a certain course of action?** Some documents argue in favor of a change, or urge the reader to follow a particular course of action. If this is the case, you can almost always find this information in the introduction or conclusion of a report, and the body of the report may discuss it in detail. Other documents do not contain a recommendation, but simply present data or research findings. In this case, you would need to analyze the data or research and recommend an action.
- **What are the benefits or consequences of this course of action?** Whether you comment upon the recommendation in the report or make a recommendation based on your analysis of the

information in the report, be sure to include a discussion of why (or why not) the recommendation is a good idea. If there are benefits, state them, since this will help to make your recommendation more persuasive. Although you will want to emphasize the positive, be sure to mention any consequences.

Resources

Colorado State University – Writing Executive Summaries

<http://writing.colostate.edu/guides/documents/execsum/index.cfm>

California State University, Northridge – Executive Summaries Complete the Report

<http://www.csun.edu/~vcecn006/summary.html>

University of Wollongong - Good and Poor Examples of Executive Summaries

<http://unilearning.uow.edu.au/report/4bi1.html>

Sample Executive Summary

It's helpful to begin an executive summary with a short description of the **background** of the issue, so that the reader will understand the **history** of the report's topic. For example, if writing an executive summary of a report on various health insurance programs available to your organization, you might begin with a paragraph on reasons why considering a change in health benefits is a good option at this time. You might point out that health care costs have risen dramatically, both federal and state tax laws are changing, and the organization's needs are different than they were a decade ago, since employee demographics have shifted. The opening paragraph needs to make the focus of the report very clear.

Next, you would inform the reader of the **objective**, or **purpose**, of the report. In the health benefits report model, this paragraph might explain how the report demonstrates that a change in the organization's employee health plans would be beneficial to the organization. The goal of the report is to support a change in the organization's benefits policy.

Then you might outline the **benefits** of the plan or course of action that you recommend. A bulleted list can be an effective way to state the benefits in a clear and concise way. Since an executive summary will not contain extensive data or details, this is an excellent way to summarize data in the report. For example, the organization should consider a change for the following reasons:

- The organization is currently spending an average of 32% of its annual earnings on benefits.
- The current health insurance is unsatisfactory according to the employees, since the current provider has raised deductibles and reduced benefits.
- A change to plan ABC from company XYZ would increase both profitability and employee satisfaction.
- Better health benefits will also improve the company's ability to recruit and hire talented job candidates.

Once you've recommended and outlined your plan, change, or course of action, it's important to give a brief overview of how the change or new program will **operate**, so the reader will know what's involved in the following your recommendation. After the organization officially announces the change, employees would need to choose benefits plans and reenroll in with the new company with thirty days. The new insurance would go into effect in ninety days.

If there are **changes in cost, procedure, or funding** associated with the new course of action, make this clear to the reader. Health premiums will decrease by an average of 22%, and employees can manage all claims online, but will still have access to an in-house benefits coordinator, for example.

Finally, you will want to conclude the report with a **specific recommendation** based on the information in the summary. The organization needs to switch to company XYZ's health package at the beginning of the next fiscal year, since this will increase profitability and employee satisfaction.