

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.

The executive summary is usually no longer than 10% of the original document. It can be anywhere from 1-10 pages long, depending on the report's length. Executive summaries are written literally for an executive who most likely DOES NOT have the time to read the original.

- Executive summaries make a recommendation
- Accuracy is essential because decisions will be made based on your summary by people who have not read the original
- Executive summaries frequently summarize more than one document

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?
- Executive Summaries

• Concise Statement

- As a cover sheet to your document, an executive summary need not go into ANY mention of how you conducted your analysis and/or what you're basing your conclusion on. Instead, begin with a concise statement of the conclusion you reached after conducting your analysis and/or research is the paper that will be attached. For example, after a comparison of what other schools like CSU do about personal calls for faculty, you conclude that the CSU is charging for calls most other institutions do not.
- How you word the conclusion will differ depending on your audience and what they care most about. The following examples illustrate how the wording must change given an audience's needs.
- **Example One**
- **Colorado State should discontinue the practice of charging faculty for personal calls.**
- This is a good example if the people you work for are only interested in this issue. It begins with a summary of conclusions regarding only the CSU population.
- **Example Two**
- **Because I have found that over 75% of comparable institutions do not charge for personal calls, I have concluded that our faculty is justified in objecting to this practice which should be seen as a "perk" for our faculty.**

- This sentence provides unnecessary information about other institutions and/or why the faculty think they deserve to have these calls paid for. Your readers can get that information from the report. Further, the use of "I" is unnecessary since your readers already know who wrote the report.

• Writing Recommendations

- 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. For example, the report on charging for personal calls was requested by the president's office, not the individual departments and colleges who actually determine policy. As a result, the recommendation for action is geared toward what the president's office should do, not the other departments involved. To learn more about writing recommendations:
 - 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].
- **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.
- **Example:**
 - 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.

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 as in the example to the right, but actions can be justified many ways, depending on the concerns of the audience and the topic of the report (e.g. for CSU these might include increase in student learning, better relationship with the community, etc.).

- **Example:** Based on the current number and length of long-distance personal calls by faculty, such a proposal would cost the university \$150,000 annually. In comparison to the overall budget, this is a small amount, but one which might "pay for itself" in terms of faculty satisfaction and possible recruitment benefits.

justification for the recommendation by referring to information summarized. A recommendation's justification is usually based on a reference to material already provided in the summary.

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

- **Example:**

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Example

The Mountain Resort charges below average rental rates. *(concise statement of findings)* The attached report recommends a 20% increase in price for the following equipment: 1. downhill skis, 2. telemark skis, 3. boots/shoes for downhill, telemark, and cross-country skis. *(specific recommendation for action)*

Based on average rental business for 1992-1995, these increases would generate an annual rental profit for Mountainview of \$750,000. This figure represents an overall gain of \$150,000 over current rental profits. *(justification for proposed action)*