

APMP BOK: Executive Summaries

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Summary

First impressions matter. Not only is your executive summary the first thing your customer reads about your proposal, it's also the most closely scrutinized. As a result, the executive summary is the most important part of your proposal. The executive summary is also often called 'management summary', 'management overview' or just 'overview' or 'summary'.

Investing in an impressive executive summary is worth it. This proposal section lets you communicate with the customer in a concentrated, especially persuasive way. When you write a compelling executive summary, you make it easier for evaluators to digest the key messages in your proposal. And improve your chances of winning.

While the section's name implies that senior leaders read it, it's usually read by the customer's whole evaluation team. Management reads it only very rarely. Still, this is the most important, and most read part of your proposal document.

To write a strong executive summary, your opportunity/capture or sales teams needs to provide input early. Because the executive summary clearly articulates your main proposal strategy themes for meeting the customer's needs, it's an excellent tool for providing guidance to the proposal team. It can provide a roadmap for the rest of the proposal writing process. As your solution evolves and matures, you can gradually develop and improve the executive summary throughout the proposal process.

Executive summaries should be the first section (or a separate document) of any proposal longer than ten pages (if not prohibited by customer instructions). Adding strong key messages, engaging graphics, and punchy text can all make an executive summary stronger. A simple five-box structure is an effective way to build a truly compelling executive summary.

If your executive summary is professional and persuasive, reviewers are likely to expect the same from the rest of your proposal. So, crafting a strong executive summary sets the stage for a winning proposal.

Main aim: Communicate “Why us?”

As its name suggests, an executive summary should be a summary. Its main aim is to convince a reader to pick you, your team, and your solution. The executive summary must answer the question “why us?” So, instead of a summary of the technical aspects of your solution, you should think of it as a summary of the reasons the customer should choose you.

Executive summaries are valuable in all proposals, but especially so in question-and-answer (Q&A) solicitations. In Q&A solicitations, you are often limited to submitting predefined answers and there’s little room to differentiate your offer, leaving the executive summary as your only chance to communicate these key points.

It’s not uncommon for people to struggle with writing executive summaries. Too often, they end with text full of sales speak, marketing clichés, and pointless statements that do more harm than good, like the example provided in Figure 1.

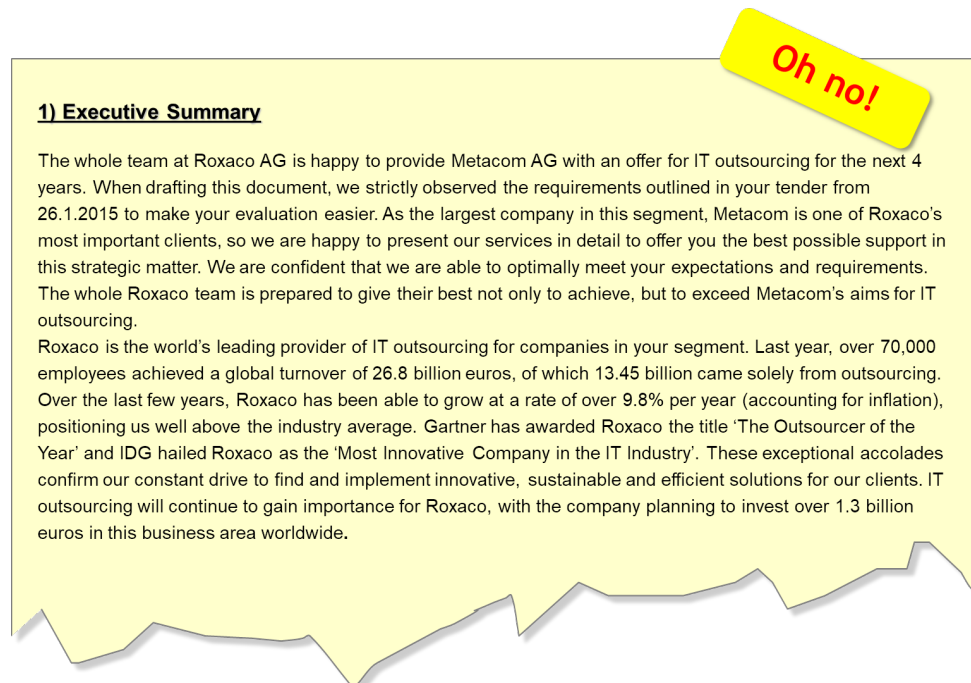


Figure 1: Widespread practice, but not best practice: Many executive summaries are a jumble of polite nothings and marketing clichés.

Effective executive summaries make an evaluator’s job easier. Evaluation teams are happy to find pre-written arguments they can simply take to their managers (i.e., the decision makers) when they recommend you as the selected bidder. Those who read your executive summary must clearly understand your technical or conceptual solution, and more importantly, its benefits. Enable your evaluators to justify recommending your solution over competing solutions.

Written for decision-makers? — not really

As the words “executive” and “management” suggest, many people expect that the executive summary is read by executives. But this is rarely true. Often, top managers are too busy to read proposals, or even just portions of them like the executive summary. These decision makers commonly rely on their evaluation team to provide recommendations about which bidder to choose and why, supported by evaluation reports and matrices.

One question remains: who reads the executive summary? Answer: everyone else!

- **The evaluation team reads the executive summary.** Proposals are generally evaluated by a team of people. Each member of the team is responsible for evaluating a certain aspect of the proposal. They have neither the time nor the inclination to read each bidder’s entire proposal. However, each evaluator also needs to establish an overall understanding of the bid. That’s why most evaluation team members read the executive summary.

With a compelling executive summary, you can give the evaluator a positive image of your proposal at the very beginning of the evaluation.

- **Employees in your own organization read the executive summary.** In its earliest draft forms, your executive summary is an excellent briefing tool. You can use it to inform your team and management about your proposal’s most important points. If your proposal team has a close relationship with the customer, they may even be able to help you come up with some of the content.

Regardless of who reads it, the executive summary should be written as if for executives: short, clear and to the point. Because the executive summary is read by many different people, investing time in writing your executive summary pays off more than any other section of the document.

Use summaries throughout your proposal

Summary-style content doesn't have to appear only in your executive summary.

Begin each section of your proposal with a section summary in the form of a theme statement. You can use focus boxes to draw the client's attention to unique benefits of your solution and back up your claims with proof points within the section.

To improve consistency throughout your document, plan your executive summary and section summaries first. This helps create a consistent storyline through your proposal, no matter the length or number of contributors.

Mirror your executive summary themes in the proposal cover, title, and cover letter.

The proposal title, packaging, cover letter, and executive summary are highly visible parts of your proposal package. Each of these components makes a strong contribution to the persuasiveness of your offer and your customer's first impression of the bid, so it is critical that your message and visuals are compelling and consistent throughout your proposal document.

Best Practices

1. Follow the client's instructions

If applicable, strictly adhere to your client's specifications.

If the customer gives specific instructions for the executive summary's content or location in a proposal, follow those instructions. If you don't follow them, you risk your customer thinking that you don't listen to them. That's not a great place to start from when the executive summary is typically seen early in a proposal.

If your customer specifies the content, position, or form of the executive summary, weave the key points of these best practices into the framework the customer provides. If there's a conflict between best practice and your customer's requirement, your customer's requirement overrides best practice guidelines.

2. Always write an executive summary (especially for proposals over ten pages)

In principle, any large proposal needs an executive summary.

It is recommended that any proposal over ten pages has an executive summary. If the customer does not specifically ask for an executive summary, include one anyway. Unless explicitly forbidden by the customer (which happens from time to time), you should always write an executive summary. Always.

3. Strategically assign writing and review responsibilities

Who should write the executive summary? It is common that many people with different skills (e.g., writing and editing), competitor knowledge, and customer expertise cooperate to craft the perfect executive summary:

- **Sales/opportunity/capture team members are key contributors.** Sales and/or opportunity/capture staff should know what the customer wants to read. That's why the sales team's contribution to the executive summary is undoubtedly important and never up for discussion. Sales staff must be able to deliver key points before the kick-off meeting.

In this stage, the writing doesn't need to be perfect. A structured writing approach can help coalesce ideas. Most importantly, sales/opportunity/capture team members should provide the customer's business drivers, aims, or hot buttons.

- **The opportunity/capture manager/executive should take a lead role in writing.** Ideally, the opportunity/capture executive writes the whole executive summary with support from the proposal manager. However, it's often enough for the sales executive to define the customer's business drivers and challenges, support the proposal team in the development of key messages, then review the finished executive summary for customer relevance. This is the minimum-recommended level of support from the sales/capture executive.

- **Use writers, designers, and editors to polish the executive summary.** When a draft is written, a skilled writer can refine the wording and a graphic artist can create the visual imagery. Use a Proposal Editor to carefully eliminate potentially deadly typos and grammatical errors.

Depending on the size of your team and organization, these roles may be filled by the bid manager, proposal manager, or an editorial specialist on the proposal team.

Review your executive summary regularly through the proposal process. When choosing reviewers for your executive summary, make sure you have a good mix of client knowledge, competitor knowledge, solution capabilities, past performance, and writing skills.

4. Make sure the section has a name

Identify the executive summary by whatever name the customer uses in its instructions. Common names include proposal overview, management summary, and management overview.

You can also extend the heading to make it informative. For example, if the customer's RFP asks for a "Management Summary," your heading could be "Management Summary – saving 23% of shipment costs with ABC." This way, you have complied with the customer's instructions, and made it easy for them to navigate since it bears their own wording. And you have included a benefit to add some appeal.

5. Draft and review early

The executive summary is the most scrutinized part of your proposal so you should make it especially good. An executive summary thrown together at the last minute is rarely compelling. You'll likely never have a finished and compelling executive summary before the kick-off meeting, but you should get used to writing a rough draft of the executive summary very early and improving it over time.

Draft the executive summary early in the bid process (starting with bullet points, for example) and develop, improve, and build on it over time. Ideally, the Opportunity/Capture Manager presents a first draft of the executive summary at the bid/no-bid decision gate review.

You might find that your workload is too high during kick-off preparations to draft a complete executive summary. It may also be the case that the solution strategy isn't complete, so you can't describe it clearly enough in your executive summary. In these and similar cases, it makes sense to begin drafting after the kick-off meeting. This is still better than rushing to write the executive summary shortly before submission.

A realistic executive summary development process is:

1. **During opportunity/capture analysis:** Gather necessary inputs during the opportunity/capture analysis phase (or as early as possible).

Build your first draft around the answers to these key questions:

- What are the customer's issues? (i.e., hot buttons, pain points, or business drivers)
- Why did these issues arise?
- What results do they want to achieve by solving these problems?
- Which outcome or result is the most important?
- How is your solution different from your competitors?
- What results will each solution produce?
- Which is the best solution and why?

Traditional strategy tools like a strengths, weaknesses, opportunities, and threats (SWOT) analysis or a bidder comparison matrix can be good starting places for creating your first draft.

2. **Between RFP analysis and kickoff:** Shortly after the RFP analysis (or before if possible) and before the kick off meeting, prepare a first draft. Plan before writing. Prepare a content plan for your executive summary before you start writing. At this stage, your draft summary is a powerful internal tool to gain senior management endorsement. It can also serve as a briefing or alignment tool to get fundamental information across to the entire proposal team. At this stage, your executive summary should contain:
 - **A re-phrasing of business drivers and challenges.** This is critical to demonstrating your understanding of the customer’s needs. Answer these questions: What does the customer want to achieve? What’s important to the customer? What are their hot buttons?
 - **Key messages / theme statements.** Your key messages should answer “Why us?” and describe discriminators.
 - **Rough draft solution.** Include your proposed solution. This may be in bullet points at this state (i.e., no full text yet), but should already include benefits.
3. **During the proposal process:** Make ongoing updates and edit the draft (by editor/proof-reader if possible).
4. **During proposal reviews:** Test, review, and finally approve the draft.
5. **Shortly before submission:** Add final prices and other last-minute touches.

Allow time for changes in the executive summary as your proposal effort progresses. Be sure to do a final proofread after any last-minute changes to preserve the quality. Keep production schedules in mind when editing to make sure there’s enough time for layout, graphics, and printing.

6. Find the appropriate length

There is no set length for an executive summary. The typical executive summary has about two pages, regardless of proposal length. Factors to consider when determining executive summary length:

- **The length of the executive summary should be relative to the size of the overall proposal.** The length of the executive summary often depends on the length of the proposal. For example, a two-page executive summary is a good size for a 30-page proposal. For extremely large bids (with thousands of pages), even a 10-page summary may be too short.
- **Follow your customer’s instructions.** The customer’s requirements supersede best practices. So, if the customer stipulates a two-page summary, provide a two-page summary.

- **Don't prioritize brevity over including the information you need to convey.** The “one-page executive summary” is often cited as the gold standard. In practice, a one-page summary is often not possible without compromising readability, graphics, or valuable information.

In general, keep your executive summary as short as possible. For any executive summary longer than two pages, use subheadings to ease navigation and understanding.

7. Position your executive summary first

Think of the executive summary as an independent document, read separately from the other chapters. Formulate your summary to reflect this, and place it first in your proposal package. Other factors to consider:

- In most cases, the executive summary is a separate chapter at the beginning of the document (uppermost in the folder/binder/file, for example).
- In extremely large bids that span multiple folders/binders/files, you tend to see the summary presented separately (i.e., in its own folder/binder/file).
- Creating the executive summary as a separate document (i.e., a separate file or included behind a separate tab in a binder/folder) or “just” as a separate chapter/section is a matter of taste or opinion.

Any customer specifications contradicting these best practices take top priority.

8. Use a customer-first structure

Use a structured approach for your executive summary. There are many options for building a persuasive executive summary. One effective approach is the five-box structure. This easy-to-use tool consists of five sections or “boxes:”

1. **Section 1: State the customer's business drivers, goals, and challenges.**

People buy from people they trust. Use the first section of the executive summary to win your customer's trust by simply and concisely stating why your customer wants to make a purchase/requisition and what their business drivers and/or challenges are.

This isn't about the technical requirements. Rather, consider the customer's perspective on why they're asking for a solicitation for this project. These business drivers are often called

“hot buttons” or “pain points.” This is your opportunity to connect with the customer first.

This section articulates your understanding of the customer’s hot buttons. Prioritize them according to what is most important to the customer. If you are an incumbent, show that you understand that needs have changed. You can also use this section to describe the characteristics a success partner needs. Ideally, later you will echo those sentiments in your own capabilities.

Important: in this section, only refer to the customer’s goals and challenges. Don’t mention your organization or even your solution (yet)! You want to make sure the reader nods after reading the first paragraph (this is a valuable, and first, “yes” from your customer).

Example (fictitious):

‘Customex Inc.’s current machinery has reached the end of its 12-year lifespan. Maintenance costs have increased significantly. Frequent disruptions to service don’t just lead to annoyed customers, but also expensive and morale-destroying overtime for employees. At the same time, Customex must deal with increased pricing pressure from the competition, so has set the goal of decreasing all operational costs by at least 10% over the next two years. That’s why, over the next nine months, Customex wants to replace all of its machinery with new equipment with half the disruption rate and at least a 10% reduction in operating costs. As well as these non-negotiable criteria, the ability to flexibly reconfigure the machinery to produce new parts will be decisive in choosing a supplier.’

If your customer says, “yes, that’s exactly it!” after reading, then you’ve done it right.

2. **Section 2: Introduce your solution (including key benefits).**

After you have demonstrated that you understand your customer’s challenges, briefly summarise the cornerstones of your solution or offer. Be sure to state the resulting benefits (as specifically and quantifiably as possible). Each benefit should, of course, be as tailored as possible to the needs you described in the previous paragraphs of the executive summary. Explain the value your customer gets for investing in your solution, but avoid too much technical detail. Instead, focus on benefits and clear discriminators. Always include concrete proof points to substantiate your claims.

Use your proposal themes and best discriminators here. If you followed best practice when you developed your story, you can simply take the most important key messages (theme statements) from your solution description and place them in this section. You may need to adjust the language and phrasing a little, but you should have all the right components on hand because they were crafted in a feature/proof/benefit structure. This section should use the customer's name as often as possible. Even more frequently than your organization's name.

Use graphics in this section to reinforce proposal themes and key statements. They appeal to visual learners and further support your messages.

When you can, ghost your competition by indirectly highlighting their weaknesses (without naming them).

This section is usually the largest part of your summary.

3. **Section 3: The customer's investment (costs, price, conditions)**

Many proposal writers struggle to incorporate prices into the executive summary, fearful of scaring off the customer with a high number. Generally, however, the executive summary should always include the price.

Why? For a reason that is important to your customer:

From the customer's perspective, the price is generally one of the most important pieces of information, whether we consider price to be a primary factor or not.

You know that when you receive an estimate or quote, (for home or auto repair, for example), the first place you look is the price. You can expect your customer to have a similar reaction. You can use this to your advantage because your customer is likely to read the information around your "price tag." On the other hand, if your price is missing from the executive summary, your customer may skip to the price page and neglect reading any other part of your proposal. That's the last thing any proposal writer wants. Once there, the customer will focus on the price features of your offer (daily rates, unit prices, etc.) rather than understanding your solution. Avoid that reaction by including your price in the executive summary, with your most important content.

Only provide the most important prices in the executive summary. It can make sense to provide a price range (such as “depending on the option chosen”), only provide the most significant pricing components, or only state the overall price for the basic option. Don't include a detailed price calculation or a comprehensive pricing table in the executive summary.

To avoid “price shock,” it's best to compare the price with the quantified benefit. Ideally, you should highlight the return on investment (ROI or the period it would take for the investment to pay off). If this isn't possible, estimate the quantified benefit (such as estimated savings in terms of additional human resources) to help the reader contextualise the price. Whichever option you choose, be sure to reference the benefits.

In some circumstances, you may have to provide additional details with your pricing. To provide the customer with the best understanding of your price, you should add details on price-affecting conditions (for example: “assuming that Customex already fulfill interface parameters”).

There are certain situations where providing the price in the executive summary is a bad idea. Some RFPs (mostly government) explicitly require that all pricing information is contained in the pricing volume. That information is usually packaged or sealed separately from the technical bid. This is based on the customer's belief that the evaluators of individual chapters should not be positively or negatively influenced by price.

4. **Section 4: Show your customer the next steps.**

In this section, you'll show that you didn't just focus on the RFP and the products. In this block, make it clear that you're looking ahead and actively thinking about the next steps.

First, we have the steps that are on your customer's mind:

“We'd be happy to present our solution and its savings potential to you in detail at your offices at the proposal presentation in calendar week 32.”

“We would also be happy for you to visit the reference contacts we provided. Our suggestion is...”

You could also make your own trust building suggestions:

“We invite you to our test centre, where we can demonstrate all solution components by way of a live simulation.”

“An analysis workshop would allow us to fully specify details for the analysis software. At this workshop, we can verify expectations. This means Customex can rule out a number of risks.”

5. Section 5: Wrap things up.

In the final section of the executive summary, you should review why the customer should choose you and communicate your willingness to ensure a successful collaboration.

This is typically only a short paragraph or even just a single sentence:

“Roxaco will do its utmost to ensure Customex’s efficiency and performance targets are smoothly implemented.”

This isn’t just intended to sweet-talk the customer, rather to provide a well-rounded ending for the executive summary and add a personal touch.

For any executive summary longer than two pages, use subheadings to ease navigation and understanding. Structural instructions from the client always override these recommendations.

9. Apply principles of clear writing

Just like other text in your proposal, your executive summary should uphold the principles of clear writing. Your evaluators should not need advanced English degrees to understand your solution. Precise, engaging phrasing is even more important in the summary than in other proposal text. It should be written in natural, fluent, and compelling language. Avoid “corporate” or marketing speak.

One rule is especially important: be as specific as possible. When you write a summary, you run the risk of making it shallow and generic. Name the most important factors while staying very specific, as the comparison below shows:

Generic formulation:

“The use of a C3 processor facilitates increased speed, significantly reducing production costs.”

Specific formulation:

“By using a C3 processor, you can increase speed by 25% and benefit from a reduction in production costs of up to 10%.”

10. Visualise with graphics, charts and images

Use images and graphics to support your message. This applies to your proposal's body as well as the executive summary. Visuals serve as guideposts through your proposal. Graphics can add emotional appeal while a professional layout makes the key points easy to see.

It can be difficult to make graphics that consolidate your theme statements while still effectively communicating them, but it's worth the effort. If you manage to pack your key messages into graphics (with a focus on customer's benefits), they'll add considerable value to your proposal. Omit dense graphics or those that don't effectively support your statements.

Bonus tip: trying to express your most important theme statements in a simple-to-understand image is an excellent mental exercise during the proposal creation process.

11. Review and test the summary before submitting it

Review and test the quality of your summary before submitting it to your customer.

1. Have the executive summary read by a neutral person. Can they reiterate the key messages? If no, rework it to make the important points clearly identifiable, perhaps by using call-out boxes or graphics.
2. Replace your organization's name with your competitor's name. Does it still read credibly? If yes, consider reworking the summary to make it more specific to your offer's benefits.
3. Replace your customer's name with another customer's name. Does it still read well? If yes, make it more specific to your customer's needs.

Application in Diverse Environments

Using summaries throughout your proposal

Summary-style content doesn't have to appear only in your executive summary. Consider adding these types of content summaries:

- Begin each section of your proposal with a section summary.
- Use focus boxes to draw the client's attention to unique benefits of your solution (and be sure to back up your claims with proof points in the section detail).

If you plan your executive summary and section summaries before writing, they create a consistent storyline. This makes it easier for writers to understand how to write their section. Using this approach helps create a consistent storyline throughout your proposal, no matter the length or the number of contributors.

If it is not allowed...

If customer instructions or procurement rules disallow an executive summary, you can explain the key points of your solution in other ways, for example:

- In your cover letter
- In the first sections of your proposal body
- In the first paragraph of a short proposal

Recent Trends

Use creative and eye-catching packaging

Standard executive summaries are presented as plain text in a document format, ideally accompanied by graphics. However, some vendors have started to give their executive summaries a more “designed” look, presenting them in glossy magazine or booklet form (of course, only when this is not disallowed by the RFP).

Looking for something more creative and eye-catching? More innovative approaches include poster-format executive summaries or other creative treatments. All this helps make your summary stand

out, reflects the importance of this key section, and differentiates your proposal from your competitors.

Use technology to add depth to your executive summary

Looking to add more content to your executive summary? Consider these tech trends:

- **Add video.** As electronic delivery has become the norm, bidders have started to embed short video clips directly into PDF files. Professionally produced videos are the most effective form of visual communication, perfectly suited to get your summary messages across.
- **Add QR codes.** If appropriate (e.g. if not breaking any confidentiality rules), you may want to provide a QR code that enables the reader to share the executive summary with other evaluators.
- **Add digital to an analogue submission.** If you're required to submit a printed proposal, you can still integrate video. Creating a video book is more work, but very impressive. These simple video players show a video sequence when the proposal book is opened and are available online.

Common Pitfalls and Misconceptions

Avoid common mistakes in your executive summary to deliver a high-impact document.

- Don't confuse the executive summary with the cover letter. These are two separate elements of a bid. Be sure that your executive summary does not contain:
 - **A greeting.** The executive summary is a chapter of the proposal document, so it does not need a greeting. You shouldn't address anyone at the beginning of your executive summary ('to whom it may concern' or similar).
 - **Signatures.** While the cover letter (like any letter) should contain signatures, the executive summary most definitely should not. If you'd like to confirm the bid's binding nature with a legally valid signature, it could be a good idea to create a separate section called "official signatures," "offer certification," or "legally binding signatures."
 - **Polite nothings.** Eliminate polite yet meaningless statements such as "thank you for giving us the opportunity to prove our abilities."
- Don't use marketing copy or generic information in your executive summary. Instead, make it as specific to your bid and customer as you can.

- “As the leading provider of,” “we put the customer first,” and other clichés do not belong in a proposal. While tempting to include them in your executive summary, they don’t add substance or credibility.
- Sadly, too many executive summaries read like marketing documents rather than sales documents. They often lack specific user benefits that could help the customer see that their needs will be met. Marketing copy is designed to address a market rather than an individual customer, which is why it’s written to be general. A good executive summary is unique to each opportunity because solutions, client requirements, and competitors differ from one opportunity to the next. Overusing boilerplate or clearly recycled content may lead evaluators to think you have not thought carefully about their needs. The summary should provide readers with a business case or a value proposition to convince them to select you.
- Don’t add your corporate history to the executive summary. If you feel compelled to include it, do so as an appendix to the proposal.
- Don’t confuse the executive summary with the table of contents. The executive summary isn’t intended to serve as a navigation aid for the reader. Eliminate statements like “you will find the technical description in Chapter 3,” since that’s what the table of contents is for.
- Don’t rush the executive summary at the end. Writing it two minutes before the submission deadline spells disaster. Write and review your executive summary early to be sure you create the best product possible.
- Don’t write it just for executives. The executive summary should be aimed at both senior-level decision makers as well as everyone else on the evaluation team.

Terms to Know

- Bidder Comparison Matrix (BCM):
A tool used to analyze the customer's current perception of your solution compared to competitors. It usually is a weighted score that indicates the customer's confidence that you can meet their requirements.
- Hot Buttons:
Singularity important issues or sets of issues that are likely to drive decisions, usually associated with customer buying decisions. Hot-button issues are items that the customer repeatedly discusses and often are problems with a system, software, process, or resources inhibiting the success of the customer's organization.
- SWOT:
The analysis performed by organizations to address competitive positioning and identify the outcomes needed to develop a compelling proposal response that wins the business. SWOT emphasizes the internal environment. TOWS emphasizes the external environment.
- Win Themes:
The components of a proposing organization's win strategy. A win strategy can be made up of multiple win themes. A win theme must contain a feature, a benefit, and a corresponding proof point. Win themes should be reinforced throughout a proposal.

See Also

You can explore other sections in the APMP Body of Knowledge to supplement your Executive Summaries knowledge.

- Customer Analysis and Competitive Intelligence
- Competitive Price To Win
- Features, Benefits, and Discriminators
- Graphics and Action Captions
- Page and Document Design
- Persuasion
- Persuasive Writing

- Proactive Proposals
- Proposal Organization
- Relevant Past Performance
- Strategy and Win Themes
- Value Propositions
- Writing Clearly

