

Executive Summary

Last Update: DD / MM / YYYY

Introductory statement. *This introduction should be no more than one paragraph in length. You can briefly introduce your company's name, purpose, and prospects for the future.*

Key Information	<p>Legal Name: [Legal Name of Organization] Leadership: [Name, Role], [Name, Role], [Name, Role] Location: [City, State, Country]</p> <p>Investors: [Investor Name/Group], [Investor Name/Group], [Investor Name/Group], [Investor Name/Group]</p> <p>Ownership Structure: Ownership % Breakdown</p> <p>Website: [Website Address] Contact: [Email / Phone Number]</p>
Organizational History & Context	<i>Briefly elaborate on the history of your organization. Provide context about why your organization exists in its current form.</i>
Purpose & Mission	<i>This is the place where you can define your organization's purpose. If you already have a mission statement, include it here as well.</i>
Products & Services	<p><i>Give readers an overview of the products/services that you offer.</i></p> <p><i>Consider answering the following questions:</i></p> <ul style="list-style-type: none"> • <i>How is your product/service unique?</i> • <i>What is your competitive advantage?</i> • <i>What problems does your product/service solve?</i>
Competitor Analysis	<p><i>Elaborate on the competitors that exist in your market.</i></p> <p><i>Consider answering the following questions:</i></p> <ul style="list-style-type: none"> • <i>Who are your direct competitors?</i> • <i>Who are your indirect competitors?</i> • <i>How are your competitors performing?</i>

<p>Market Analysis</p>	<ul style="list-style-type: none"> • <i>What gaps can you see in the market?</i> <p><i>Give readers an overview of your market.</i></p> <p><i>Consider answering the following questions:</i></p> <ul style="list-style-type: none"> • <i>Who is your target consumer?</i> • <i>What opportunities (and threats) exist in your geographical location?</i> • <i>What opportunities (and threats) exist in your specific industry/niche?</i>
<p>Financial Outlook</p>	<p><i>Give readers an overview of your financial situation. You may want to include the following information:</i></p> <ul style="list-style-type: none"> • <i>Estimated annual revenue</i> • <i>Estimated annual expenses</i> • <i>Profit margins</i> • <i>Current market valuation / Share price</i>
<p>Conclusion</p>	<p><i>Wrap up your executive summary with a conclusion that elaborates on the outlook of your organization.</i></p>

Further Contact Details:

Name	Email	Phone Number
[Name, Role]	[Email Address]	[Office/Cell Number]
[Name, Role]	[Email Address]	[Office/Cell Number]
[Name, Role]	[Email Address]	[Office/Cell Number]
[Name, Role]	[Email Address]	[Office/Cell Number]
[Name, Role]	[Email Address]	[Office/Cell Number]

Keep Things Clear and Concise with Our Free Executive Summary Template

Whether you have an upcoming presentation for potential investors, or you're tasked with introducing the company to a new corporate partner, a quality executive summary template is a must-have for business professionals across all departments.

Having a good template isn't all you need, though. You also need to understand how to write an executive summary that is simple, engaging, and able to resonate with readers.

To help with that, here are 5 ways that you can get the most out of your free executive summary template.

5 Ways to Get the Most Out of Your Free Executive Summary Template

1. Less is More

After your executive summary template is downloaded, you can then begin to map out exactly what you want to say about your organization.

During this initial step, it's important to remember that the purpose of an executive summary is to give readers a quick and easy to understand snapshot of your organization. That being said, less is always more when it comes to writing your executive summary.

For example, it's okay to include a little bit about your organization's history, however, you do not need to share irrelevant details that may be distracting for readers. Try to keep the information as streamlined as possible; highlighting only the most critical details that you want the audience to pick up on.

2. Use Clear and Concise Language

Once you have your executive summary template structured just the way you like it, now it's time to write. When writing, try to use language that is clear, concise, and simple for readers to understand. Additionally, you should also avoid using the passive voice and try to keep your sentences around 20 words in length.

Keeping your language clear and concise helps readers to understand your executive summary with ease – allowing them to focus on what really matters. This is especially true if your readers

are not native-English speakers, as they may not be able to quickly understand complicated sentence structures and wordy phrases.

3. Tailor it for Your Audience

Even though most executive summary samples follow a similar format and pattern, you should still tailor each one to the specific audience that will be receiving it. For example, if you plan to send your summary to parties outside the organization, make sure that you do not expose any of your organization's industry secrets.

You can also consider the audience when choosing which items on your summary to highlight. For example, a potential charity partner may want to learn more about your values and mission as opposed to your financials. On the contrary, a potential investor will want to know more about your market share, profit margins, and leadership.

Remembering to tailor your executive summary for each audience not only protects your organization, but it ensures that your audience only receives information that is relevant and helpful to their decision making.

4. Keep it Updated Regularly

Your executive summary word template should be a regularly updated document within your organization. The purpose of an executive summary is to give readers an up to date and accurate picture of your organization, and that can only happen if the document is consistently edited and updated.

At a minimum, you should review your executive summary on a yearly basis and always make sure to update it if your business undergoes a significant change. This is something that you can integrate during existing business processes, such as during internal audits, evaluations, and year-end reviews.

5. Make Sure All Information is Accurate

When filling in the boxes of your executive summary template, it is important that you only include information that is 100% accurate. Remember, your readers may have to make decisions based on the information that you give them, and they need to be able to trust you.

White lies and exaggerated figures should never be included in an executive summary. Instead, make sure that your executive summary sample pdf is a genuine and honest reflection

of your organization. This not only helps you build trust with partners and potential investors, but it can save you from having uncomfortable conversations down the road.