



A quick guide to Executive Summaries

Introduction

An Executive Summary should convince the commissioner that your service offer is better than offers from other bidders. It should be a brief, informative and compelling piece of writing, summarising the key messages in your proposal.

Your Executive Summary should make it easier for evaluators to digest the key messages in your proposal, therefore improving your chance of winning. It is not a summary of the sections in your offer, it is a sales document that demonstrates that you:

- Understand the commissioner's vision
- Understand the commissioner's explicit and implied needs
- Have developed a solution that satisfies those needs
- Offer better value than any competitor

Planning and structuring your Executive Summary

One way to plan your Executive Summary is to use traditional strategy tools like a strengths, weaknesses, opportunities and threats (SWOT) analysis or a bidder comparison matrix. Organise your Executive Summary around the answers to seven key questions:

- What are the commissioner's problems?
- Why did these problems arise?
- What results do they want to achieve by solving the problems?
- Which outcome or result is the most important?
- What solutions can you, or your competitors, offer?
- What results will each solution produce?
- What is the best solution and why?

Define a structured approach for your Executive Summary, for example:

- In the opening paragraph, connect with the commissioner. Demonstrate that you understand their vision, their objectives for success, and the challenges they face. Provide a brief overview of the value your solution will bring. Use your win theme and "killer" discriminator here
- In the next paragraphs, demonstrate that you clearly understand the commissioner's needs. Prioritise these needs from the commissioner's perspective. If you are the existing provider, indicate your understanding of how needs have changed
- In the following paragraphs, present your solution to each of the commissioner's needs. State your solution's benefits and include proof points to substantiate your claims
- In the final paragraphs, review why the commissioner should choose you. Clearly identify the win themes (i.e. features, benefits and proof points) that your proposal provides

Use a clear, easy-to-read writing style. Plain English guidelines recommend simple words and short sentences of no more than 15 – 20 words. Write clear, direct sentences in the active voice. If you use readability statistics, aim for a grade level of 8 – 10.

For most bids, one to two pages is sufficient for the Executive Summary. If it is longer than two pages (for example for a very complex bid), then you should use headings to ease navigation and understanding.

Give evaluators clear reasons to select you over your competitors. Mention what makes your solution unique and provide relevant proof points, such as success stories for similar services provided to similar commissioners.

How to use your Executive Summary

Write your Executive Summary early, so that it is available at your bid kickoff meeting. This allows the bid team to test your value proposition early, and obtain Executive sign-off, if needed.

An Executive Summary needs to be unique to each opportunity because solutions, commissioner requirements, and competitors differ from one opportunity to the next.

You can use your Executive Summary to create a good impression, by including it as a standalone section at the front of your bid. If the tender instructions do not allow for an Executive Summary, then include the content as part of a cover letter, or first page introduction, or include the key points as an introduction to your service model. Sometimes commissioners ask for an Executive Summary by another name, such as service overview, management summary, or management overview. Weave the key points into any framework the commissioner provides.

Summary-style content does not have to be restricted to your Executive Summary. Begin each section of your bid with a section summary. Use focus boxes (where allowed) to draw the commissioner's attention to unique benefits of your solution, and be sure to back up your claims with proof points in the section detail. By planning your Executive Summary and section summaries before writing, you will create a consistent storyline throughout your proposal, no matter the length or number of contributors.