

EXECUTIVE SUMMARIES COMPLETE THE REPORT

In A Nutshell



"Few writers think of the messages they are trying to communicate in a report."

--Bruce Ross-Larson, *Riveting Reports*, p. 30

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I am indebted to former students for many of the ideas suggested in this link.

Executive Summaries Provide the Essence

Executive summaries complete the report, whether an analytical report memo or whatever. Executive summaries are the parts of the reports that are read first. Readers may not even get to the detail in your report. They read the executive summaries to see if the rest of the report is worth reading.

Executive Summaries Are Called Different Names

Executive summaries go by so many different names. Sometimes the executive summary is called an Abstract. You usually find that designation in scientific papers and academic efforts. You can also call the Executive Summary simply a Summary. If you call the Executive Summary a precis, you are probably misnaming it. A precis is usually a sentence summary.

Abstracts Differ from Executive Summaries

Abstracts differ from executive summaries, because abstracts are usually written for a scientific or academic purpose. You see abstracts related to scientific lab reports. You see abstracts related to databases, where a summary or abstract of the article is given. Abstracts, according to Janis Ramey in "How to Write a Useful Abstract," fall into this kind of structure:

- First, prepare a topic sentence that encompasses the entire article or whatever you are summarizing.
- Next, prepare two or three subordinate sentences that support your main idea or topic sentence.
- Then, tie everything together with transition and logic.

That is a well-written abstract. You say what you have to say, and stop.

Executive Summaries Briefly Cover Every Main Section

In this class we are going to include the Introduction (Issue, Purpose, Scope and Limitations, and Alternatives), Significant Considerations, Analysis and Decisions in the executive summary. The executive summary will probably be one or one and one-half pages by the time you finish writing. The executive summary will appear after the transmittal memo and just before the first page of the analytical report memo.

In the executive summary you will probably want to put the Issue (Problem) and Purpose in the first paragraph. The Scope and Limitations as well as the Alternatives (Procedures) will go in the next paragraphs. The Significant Considerations, Analysis, and Decisions will comprise the final paragraphs.

Normally, your executive summary (with double spacing) will run about one to one-half pages of copy. You should make sure you only put in significant Considerations, Analysis, and Decisions.

Proportionate Spacing Is Devoted to Executive Summaries

Business writing students often ask this question about executive summaries: How long should they be? Here, you have to think about proportion of the summary to rest of the report or document. For example, in a five-page analytical report memo, you probably would devote one to one and one-half pages to the summary. In the 9/11 Commission Report, a 30-page executive summary was conceived. Think of the length of this two-year prepared report: 428 pages and with the 1,700 footnotes and appendices, 567 pages. Thomas H. Kean and Lee Hamilton (co-chairpersons of the 9/11 Commission) in their book, **Without Precedent: The Inside Story of the 9/11 Commission** remarked about their need for an executive summary and its wordiness:

"Because of the word limit imposed on our report, we had to condense all of our work into a digestible 30-page executive summary that could stand out on its own as a separately published document. This document would prove essential in the days and weeks after our report came out, as it was often the reference point for members of Congress and their staff during hearings on our recommendations." (p. 296)

The next time you have to deal with length, always think of proportion. If I have a 10-page report, how long should the executive summary be?

You are probably saying: please show me an executive summary. With that thought, I will provide you such a document:

EXECUTIVE SUMMARY

Work demands and family responsibility have increasingly come in conflict as mothers have become a large part of the workforce, and fathers have begun to share in the caregiving responsibilities. Working parents at B. Insurance Agency need to care for their children. What benefits can be obtained from the employer and employees by encouraging B Insurance Agency to provide a daycare center during working hours? Child care programs can benefit employers by decreasing absenteeism, providing higher productivity, and having a lower

turnover rate. Developing a program at work can make it easier for parents to balance their work and family responsibilities at B Insurance Agency.

This report involves Thousand Oaks, possible child care, and an insurance company called B. Insurance Agency. Surveys are given to employees, and three interviews occur with a working parent and two managers.

The 19 completed surveys indicated if employees have child care needs and what these needs are. The survey also specified how the company is affected. Nine employees (47 percent) missed a full day during the past six months because of child care difficulties or because the child was sick. Ten (53 percent) employees had a minor problem with the ability to do the job well and the level of stress experienced. Over half of the employees (n=14) have children under the age of 12 and usually needed child care during the work hours. Twelve employees (63 percent) think one of the most important requirements is the need for more employees than ever before to handle child care while they work.

Unscheduled absenteeism reported to supervisors as being caused by illness or personal problems, in some cases, caused the underlying difficulty with child care. Difficulty with child care is considered to be the third largest cause of absenteeism in the company. Tardiness provided sufficient cause for nine employees from commuting delays because child care is inconveniently located.

For this selected sample, respondents support and prefer care to be located at or near work. Child care programs can be an effective management tool that serves the goals of both the company and the program participants as well. Company centers are one of the more expensive options for employers, but these centers represent the greatest potential for solving a wide variety of child care needs if properly designed.

Setting up a daycare program on site at B. Insurance Company can be accomplished as a non-profit organization with a board of directors consisting of parent and company representatives.

Comments: The previous executive summary is well written, but it has some flaws that should be noted. In the Analysis ("For this selected sample . . .") the point should be more strongly driven home about parental involvement. That will further make the Decisions or Recommendations ("Setting up . . .") stand out. Of course, many sentences that have "is" and "are" need power verbs. For example, the sentence starting "The scope of this report is . . .," could read: "This report concerns B. Insurance Agency located in Thousand Oaks and its attempts to establish a daycare center."

Notice how the writer has cleverly mentioned over half by saying in parentheses, n=14. Did you note that the executive summary did not start with the question? It started with the theme and perspective to prepare the reader for the problem question. Did you read how strongly worded and clearly stated was the problem question? The problem question still remains the heart of the report, including the executive summary.

All main sections of the report were covered in the previous executive summary. Only the major percentages of significance were included in this executive summary. The reader can look at this executive summary without even reading the report.

Strong Beginnings Encourage Good Reading

Executive summaries demand special attention. The first sentence must grab and keep the reader. You cannot afford to start your executive summary with one of the following approaches:

- The purpose of the report

- The problem question
- All kinds of background to the report.

The executive summary demands your best thinking.

Four Major Points Emphasize Summarizing

When you complete your executive summary, you have one more summary to write. You start with an introductory sentence, such as:

The following points are ascertained from this report:

You are now faced with what to write. You can have only four major points of your entire executive summary. I would urge you to write the following:

- one major conclusions or analysis
- one major recommendation or decision
- something about the problem and what you studied
- one major consideration.

No matter how much we talk about the bulleted items, you need to see an actual example from a former students's report:

The following major points can be ascertained from the report:

- Stronger tutorial programs can benefit students by increasing their confidence in math, providing an environment that will stimulate learning.
- Providing students with extensive study groups will help students pass remedial math courses.
- Seventy-nine percent of remedial students are able to complete requirements in a year.
- Minority students are considerably affected by Executive Order 665.

Note: Do you see how the writer has tried to place major recommendations and considerations in the four bulleted points? Did you notice how the writer effectively used an introductory sentence? Did you notice how the writer wrote a "summary" within a summary with the use of bullets?

Now, take the following example and tell how the writing could have been improved.

...With current personnel and five days of awareness meetings on the importance of collections as well as monthly updates, the campus newspaper can certainly achieve a fail-proof collections department.

- Quick growing service industry
- Proper collections prove to increase cash flow.
- Eliminating customer loopholes
- Five days with monthly update seminars in-house

By setting up the proper correction at minimal cost to the company, past-due collections can be virtually eliminated.

You now have told the essence of the report. You have written a *summary within a summary*. You have told the essence of your report in case the reader never reads every word of the summary. You

bullet the main points to make them stand out. You indent them for the same reason. Now, your executive summary has punch and verve. You have given your reader something to think about.

How-To Involves Careful Writing

When you face writing an executive summary, how do you go about the task. You read over the entire report several times. You carry out some of these activities:

- You mark in the margins of the report.
- You underline key passages.
- You think how the report will look on paper.

Now, you have the daunting task of writing the actual executive summary. You think of your first sentence. It must be the best sentence you have ever written in your life. You must grab the reader to peruse the entire executive summary. Ask yourself these questions:

- Did I pinpoint the essence of the message?
- Did I understand the problem, the real problem?
- Did I state the idea as a symptom and as a purpose?
- Was I sure I grasped what the reader must find in the entire report?

It is not unwise to group items together in paragraphs. For example, the first paragraph of your executive summary can have the problem and the purpose. In the second paragraph you can explain the scope, limitations, and the procedures. You may want to devote a separate paragraph to the procedures.

When you write the Considerations or Findings, concentrate on the major findings. Make sure you stress just numbers and no conclusions or generalizations as you are writing. Force yourself to only think of the data. Make sure you cover every major part of the Considerations so the report has cohesion.

When you reach the Analysis or Conclusions, concentrate on the generalizations. Take apart the message. Look carefully at each bullet or number and say: Is that important? Upon reaching the Decisions or Recommendations, talk about specifics. Tell what you want the company to do, based on the data. Tell what you want individuals to do. Then, ask yourself: Have I written the report in miniature? Could someone look at this report and tell the essence of the message? Could someone read this summary and not read the report? Has the message been distilled?

Executive Summaries Remain Old

One always thinks reports and report writing are a relatively new phenomenon. History teaches us a different lesson. During the Manchu Dynasty (called by the Chinese, Qing Dynasty) in 1729-30, an incident of treasonous consequences happened. It started with a treasonous letter and built to three secret reports written by General Yue (pronounced Yu-a) in Hunan. The Emperor, Yongzheng, who ruled from Beijing, received these secret reports by special military messenger and in special boxes. These reports conformed to a certain format. Thus, begins our story.

General Yue was approached one day while riding in his sedan chair by a mysterious messenger. The messenger handed General Yue a letter; the messenger was promptly detained. General Yue became bothered as he read the contents in his office by the signature of Summer Calm, the Leaderless Wanderer of the Seven Seas. You think about e-mail signed now with emoticons and pseudonyms? You think about chat lines with made-up aliases. Who was this Summer Calm? The messenger was interrogated, first politely and then with torture. The messenger was interrogated,

because the letter contained libelous comments against the Emperor and accused the Emperor of not caring about the people. General Yue began to make out his first secret report to the Emperor. In the secret report the General followed this format:

- introductory title to show the content
- main points sequentially arranged
- termination with general conclusions and suggestions for action.

Doesn't that sound like a form of executive summary? The Emperor requested considerable white space be left around the document. The Emperor wanted to write in the margins and at the bottom of the document. The paper appeared standard with each sheet 10 inches high and around two feet broad. The Emperor could unfold the document in a concertina fashion, similar to a road map you might purchase in a gas station. The Emperor could read each folded section, one section at a time. The document was prepared in beautiful, black calligraphy. The lines were spaced far enough apart to allow the Emperor to make red notations. General Yue chose for his introductory title, "A Secret Report, Blunderingly Written, Which the Emperor Is Implored to Read with Compassion." We certainly shorten our titles these days, don't we? Please see Dr. Jonathan Spence's *Treason by the Book* for more details of these remarkable secret reports.

After the thorough interrogation, General Yue sent two more secret reports to the Emperor. These reports followed the first messenger, and General Yue was concerned about the other reports reaching the Emperor Yongzheng in time. These reports named five conspirators and, eventually, 13 conspirators. General Yue cleverly used a friend disguised as someone sympathetic to the messenger to extract more information. The messenger finally told General Yue his teacher was the sender of the treasonous letter. The Emperor Yongzheng had already carefully read the first report. He suggested to General Yue in the margins to take more diligent steps to interrogate the prisoner. The second report especially caught the Emperor's eyes. In that report General Yue confessed to swearing a terrible oath to convince the messenger of a necessary confession from the messenger.

Emperor Yongzheng completed his notations and sent a special box with the noted reports back to General Yue.

The arrests of the so-called conspirators now began in different Chinese provinces. Jonathan Spence, the Yale University author, considered the plot rather inept. The people who started the plot were "book" people. They were, what we would consider today, research teachers. After receiving the conspirators and main perpetrator in Beijing, the Emperor's first inclination was killing. However, the Emperor Yongzheng thought long and hard about whether discrediting would work better than killing. Therefore, while the main conspirator was in prison, he started carrying on a correspondence with the Emperor. You have to realize the main conspirator, Zeng Jing, was considered a lowly teacher who had barely passed the lowest level of teaching exams. That conspirator was from a farming family. He had dreams of glory, but they were never realized.

To this conspirator's credit before his arrest, he had assembled in secret some of the finest Chinese writings, many of them critical of the Manchus. The year was now 1729, and the Emperor submitted to the main conspirator, Zeng Jing, a series of questions and answers, accusations and counter accusations. In time, the main conspirator, Zeng Jing, began to see the error of his ways. The main conspirator, according to Dr. Spence, was guilty of gullibility. What happened to the main conspirator? He was pardoned. Emperor Yongheng rejected the pleas of his ministers about killing the main conspirator. The issue became one of powerful people (namely, the Emperor) thinking through complexity and various thought patterns.

What is the message for business communications? Executive summaries are much older than we first thought. Second, it often takes people thrust into unusual circumstances to make wise

decisions. Finally, our words live long after us. As a footnote, the original of the treasonous letter was never found.

You may want to check the [home pages](#) for further help and additional links. Don't forget to check the analytical report memo link.

(c)G. Jay Christensen, 1997

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