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TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

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Writing an Executive Summary That Means Business

by John Clayton

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Writing an Executive Summary That Means Business

Here are some quick tips for mastering the summarize-and-sell approach needed to craft winning executive summaries.

RESPONDING TO A request for proposals (RFP) is pretty straightforward. You describe your company's history, your product or service, its implementation schedule, and the support you'll provide. The one stumbling block is the one section that everyone will read: the executive summary.

What is its purpose? If you answered, *to summarize the proposal*, think again.

"Executive summary is a bit of a misnomer," says Tom Sant, founder of the Cincinnati-based Sant Corporation and author of *Persuasive Business Proposals: Writing to Win Customers, Clients, and Contracts* (Amacom, 1992). "What you're really trying to do is lay out the business case."

Thus the executive summary demands a whole different approach to writing than the rest of the proposal, one that balances efficient delivery of key information with a persuasive, well-substantiated pitch. Above all, the executive summary must demonstrate a clear understanding of the potential client's needs. A good way to do this is to include in it the ROI your services will deliver. "You need to describe outcomes," Sant says. "Describe the impact on performance—ideally a measurable impact."

Write with an eye to the audience

A strong executive summary is crafted with the audience firmly in mind: busy executives interested in bottom-line deliverables, not details. "An executive reads for certain keywords, and for the price," says Stacia Kelly, presi-

dent of Catclaw, a Woodbridge, Va.-based writing boutique. "If he likes it, he'll hand it to an assistant and ask them to read the whole thing."

For that reason, advises Bud Porter-Roth, author of *Proposal Development: How to Respond and Win the Bid* (PSI Research/Oasis, 1998), put the most critical information in the first couple of paragraphs. "The executive may not read any more," he says. But, he cautions, "the RFP writers will read the whole thing." Thus the executive summary has an additional, secondary audience: the middle managers who will make presentations about you and your proposal to senior management. So make sure the executive summary gives them the tools to act on your behalf, Porter-Roth says. To reach both of these audiences, an executive summary should do three things:

❶ Establish the need or problem.

This might be more challenging than first appears. Often, says Porter-Roth, "RFPs are poorly written. You may have to define the business issues, because the RFP was written by technical people who saw only technical issues."

"You need to convince them that this is a problem worth doing something about," Sant says. "Your biggest competitor may be that they do nothing, that they spend this money on something else."

❷ Recommend the solution and explain its value.

"Be sure to make a firm, clear recommendation," advises

Sant. For example, say something along the lines of "We recommend that integrated content management software be implemented across the company." Then you need to explain the value of your solution. Here you're not focusing on what it is, but on what its return or benefits will be.

"Rather than technical details, you need to say things like 'This solution will reduce your work staff by five people' or 'This CRM will allow you to answer questions while on line, rather than in a call back,'" says Porter-Roth.

❸ **Provide substantiation.** Give the key reasons why your company is the right company to deliver the solution. Here's where you can differentiate yourself—highlight a unique methodology, for instance, or provide a quick case study of your past work. Another idea: Include testimonials from satisfied clients. Just don't get carried away and turn the focus away from the potential client and onto your company. "It's not about the vendor—it's about the customer," says Sant. His rule of thumb: Make sure the executive summary mentions the customer's name three times as often as your company's name.

Making it pitch-perfect

Experts offer these other tips for putting together an executive summary that gets attention and gets business:

■ **Use formatting and graphics to highlight your message.** Bullets and headings will make the executive summary easier to skim, and a well-chosen graphic can drive a key point home. If you can find the information in the public record, use a graphic illustrating the client's dilemma.

"This can really rivet their understanding of how bad a situation is," says Sant.

■ **Keep it clear, clean, and to the point.** Strike out jargon, advises Cat-

Writing Winning Executive Summaries, continued

klaw's Kelly. Her pet peeves include *world-class*, *turnkey*, *value-added*, and *leverage* (as a verb). And proof-read carefully, says Porter-Roth. "Always have a fresh pair of eyes review the executive summary for grammar, selling themes, and especially overall consistency. Too often the executive summary is a cut-and-paste job and it shows."

While you're in editing mode, make sure your executive summary stays true to its name. "Keep your executive summary short—one to two pages for the first 25 pages of proposal text and an additional page for each 50 pages thereafter," Sant says.

■ **Take advantage of technology.** If you deliver electronically, Kelly says, use the linking functions in Microsoft Word. "Make it easy for them to click to more information later in the document." □

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