

TEMPLATE FOR WRITING AN EXECUTIVE SUMMARY



How To Create An Executive Summary

An executive summary should describe an entire business in just two to three pages. Thus, it must be clear, accurate and compelling but also concise. It must also immediately engage readers, and make them want to learn more about the business.

Overview

In a short paragraph, provide:

- 1 *Company name*
- 2 *When it was founded*
- 3 *Its purpose*
- 4 *Market position*
- 5 *Any “superlatives” (best of, highest earning, etc.)*
- 6 *Headquarters office location*

Business/Product or Service

[The Company] provides/produces [quick description of products and services], including:

- 1 *List notable products, starting with the most significant ones*

[Business] is now in a [startup, growth, established] stage. Our target market is _____ (be brief). Competitors of [Business] include _____. Our products offer advantages over the competition such as _____. People need our products because [describe issues/problem that prompted product development]. Also, [describe products in terms of what they offer to consumers in solving their problems and providing solutions.] We are now in the process of developing _____, with an anticipate release date of _____.

Market Opportunities

[Business] deals mostly in the _____ market. Define the market using:

- 1 *Sales figures*
- 2 *Industry growth numbers*
- 3 *Market size*
- 4 *Market share*

Consider also including a short list of notable customers.

Competitive Advantages

[Business's] major competitors include:

- 1 *X, maker of _____*
- 2 *Y, maker of _____*
- 3 *Z, maker of _____*

The advantages [Business] offers over its competition include _____.

Use the following to support the claimed advantages:

- 1 *Cost information*
- 2 *Quality differences*
- 3 *Ability to better meet the needs of customers through _____*
- 4 *New client wins*

[Business] anticipates _____ [new companies] to enter the market. While they offer _____, they also have vulnerabilities such as _____.

Business Model

Use this section to describe the model used that makes the business profitable, touching upon:

- 1 *[Business] makes money by providing _____.*
- 2 *Customers obtain the product through _____.*
- 3 *[Business] is now investigating other options for sales such as _____.*
- 4 *We earn approximately \$ ___ per sale, and _ percent of sales are from repeat customers.*
- 5 *We have _____ facilities located in _____.*
- 6 *We employ _____ people in _____ different areas.*

Management Team

List members of the management team by title, full name, number of years with the company, previous positions outside the company, and educational/licensing achievements.

Finances

Provide a brief synopsis of the business’s financial situation.

Consider using a small chart to illustrate the numbers:

<i>Last Year</i>	<i>Present Year</i>	<i>Next Year</i>	<i>Year Two</i>
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Sales:

Cash:

Assets:

Book Value:

Also, note anticipated customer growth as well as anticipated improvements in cash flow or profits.

<http://www.entrepreneur.com/formnet/form/653>

http://www.bpc.umd.edu/docs/Executive_Summary_Template.doc

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