



Executive Summaries Simplified

Structure, Sample, and Worksheet

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define it.
develop it.
put it to work.

Overview

The first few pages of your proposal are valuable real estate. Not only are these pages the one section of a proposal nearly everyone reads – they are often the *only* section some people read. That is why leading with a powerful Executive Summary is so important.

Despite this, very few proposal writers get it right.

Many people confuse Executive Summaries with company or product overviews, squandering their best opportunity to immediately demonstrate understanding of the customer's objectives and challenges. In fact, while it is important to communicate who you are and what you offer right up front, it is more important to communicate *knowledge and competence* – you know your customer, you understand your customer's challenges, and you are able to help.

In short: an Executive Summary should be a concise, well-articulated, miniature version of your full proposal.

Structure

Outline

Because your summary is a miniature version of your full proposal, it should also be structured similarly – hitting on all the major points of your full proposal in succinct, one- to two-paragraph bursts:

- State the purpose of the proposal, using the opportunity to once again reference the "end state vision" you will be painting for your customer
- Provide a short description of the customer's needs and objectives:
 - Summarize or list the customer's goals, problems or objectives as you understand them
 - Describe the impact of these needs on the customer's business as you understand it
 - Describe the value and benefits the customer will realize by addressing these needs
- Provide a brief (no more than one paragraph) explanation as to why you are the most qualified vendor to meet these needs. Include such items as:
 - Company history
 - Experience in customer's industry
 - Experience helping customers address needs similar to this customer and the benefits your customers have realized as a result
- Recommend the solution:
 - What the customer should do
 - How you will help the customer do it
 - How this solution will meet the customer's needs and the benefits the customer will realize as a result
- State the cost (this is optional):
 - Investment required
 - Return on the investment (ROI) that will be realized

- Restate the objective
- Thank customer for opportunity to propose solution
- Introduce next section

7 Sections/7 Simple Questions

<i>Section</i>	<i>Content</i>
One-sentence summary of buyer's strategic goal	What is the most important thing your client is trying to accomplish?
One-paragraph current state summary	What is/are your client's biggest challenges (pain points)?
One-paragraph problem statement, emphasizing impact on strategic goal	How is your client's inability to overcome this challenge/these challenges impacting its ability to achieve its strategic goal?
Vendor-neutral solution recommendation (bulleted if multipart)	What steps must your client take to overcome the challenge(s)?
Vendor-neutral summary of recommended selection criteria	What qualifications must a vendor exhibit to help the client overcome its challenges?
Summary of vendor qualifications as they relate to buyer's needs	How does YOUR company/solution fulfill these qualifications?
Lead-in to proposal reiterating strategic goal and ROI	What benefit will your client receive if it overcomes its challenges and meets its most important strategic goal?

Sample: Improving Content Quality at [ClientNameShort]

Summary

[ClientNameShort] is seeking to increase sales effectiveness by improving the quality and accessibility of your customer-facing content.

As you have explained, [ClientNameShortPossessive] sales opportunities have increased significantly in the past eighteen months. The sales team has grown exponentially, and you expect to hire an additional 15-20 sales representatives by the end of the year.

With hiring accelerating, [ClientNameShortPossessive] need for proposals, solution briefs, and other sales collateral has nearly tripled. Meanwhile, the marketing team – already struggling to keep pace with product and service enhancements – has become increasingly overextended. As sales' demands escalate and new reps come on board, document turnaround times have lengthened even further, resulting in an unacceptable backlog that is driving down both customer satisfaction and close rates.

In order to reduce this backlog and meet sales' and customers' requirement for targeted, high-quality selling content, [ClientNameShort] must:

- Conduct a “top down” evaluation of all sales collateral for format, language, and messaging
- Align sales collateral with [ClientNameShortPossessive] messaging and branding to establish a single, consistent company voice
- Create a library of boilerplate sales collateral that salespeople can adapt quickly and easily to address individual prospects' needs

To provide your sales professionals with accessible, well-written materials that reflect [ClientNameShortPossessive] customers' objectives, you have decided to outsource your sales content strategy and development work. You are seeking a professional consultant with experience designing and producing sales-effective content.

By engaging G2G Sales Communications to create the content necessary to support your sales team in the field, [ClientNameShort] will be partnering with an organization uniquely positioned to meet your content needs:

- **Experience:** You are seeking a consultant with sales-specific experience who can create compelling content that supports buyer decision-making. G2G offers [ClientNameShort] fifteen years of sales and marketing experience emphasizing sales knowledge development and management.
- **Expertise:** You want a consultant who can institutionalize customer-focused messaging and create content elements incorporating this messaging. G2G is a certified provider of Customer Message Management™ services, an industry leading sales enablement methodology.
- **Subject Matter Knowledge:** You prefer a consultant with subject matter knowledge of the [ClientNameIndustry] industry. As an experienced content provider to companies like [Reference1] and [Reference2], G2G is more than able to meet [ClientNameShortPossessive] needs in this area.

With G2G's assistance, you can expect a significant reduction in your content backlog and a corresponding increase in your sales team's ability to close deals quickly. At the same time, you will be better prepared to accommodate newer sales reps and help support [ClientNameShortPossessive] continued growth.

Sample Executive Summary Content Breakdown

<i>Section</i>	<i>Content</i>
One-sentence summary of buyer's strategic goal	[ClientNameLong] is seeking to increase sales effectiveness by improving the quality of its customer communications.
One-paragraph current state summary	As you have explained, [ClientNameShortPossessive] sales opportunities have increased significantly in the past eighteen months. The sales team has grown exponentially, and you expect to hire an additional 15-20 sales representatives by the end of the year.
One-paragraph problem statement, emphasizing impact on strategic goal	With hiring accelerating, [ClientNameShortPossessive] need for proposals, solution briefs, and other sales collateral has nearly tripled. Meanwhile, the marketing team – already struggling to keep pace with product and service enhancements – has become increasingly overextended. As sales' demands escalate and new reps come on board, document turnaround times have lengthened even further, resulting in an unacceptable backlog that is driving down both customer satisfaction and close rates.
Vendor-neutral solution recommendation (bulleted if multipart)	In order to reduce this backlog and meet sales' and customers' requirement for targeted, high-quality selling content, [ClientNameShort] must: <ul style="list-style-type: none"> ▪ Conduct a "top down" evaluation of all sales collateral for format, language, and messaging ▪ Align sales collateral with [ClientNameShortPossessive] messaging and branding to establish a single, consistent company voice ▪ Create a library of boilerplate sales collateral that salespeople can adapt quickly and easily to address individual prospects' needs
Vendor-neutral summary of recommended selection criteria	To provide your sales professionals with accessible, well-written materials that reflect [ClientNameShortPossessive] customers' objectives, you have decided to outsource your sales content strategy and development work. You are seeking a professional consultant with experience designing and producing sales-effective content.
Summary of vendor qualifications as they relate to buyer's needs	By engaging G2G Sales Communications to create the content necessary to support your sales team in the field, [ClientNameShort] will be partnering with an organization uniquely positioned to meet your content needs: <ul style="list-style-type: none"> ▪ Experience: You are seeking a consultant with sales-specific experience who can create compelling content that supports buyer decision-making. G2G offers [ClientNameShort] fifteen years of sales and marketing experience emphasizing sales knowledge

	<p>development and management.</p> <ul style="list-style-type: none"> ▪ Expertise: You want a consultant who can institutionalize customer-focused messaging and create content elements incorporating this messaging. G2G is a certified provider of Customer Message Management™ services, an industry leading sales enablement methodology. ▪ Subject Matter Knowledge: You prefer a consultant with subject matter knowledge of the [ClientNameIndustry] industry. As an experienced content provider to companies like [Reference1] and [Reference2], G2G is more than able to meet [ClientNameShoirtPossessive] needs in this area.
<p>Lead-in to proposal reiterating strategic goal and ROI</p>	<p>With G2G’s assistance, you can expect a significant reduction in your content backlog and a corresponding increase in your sales team’s ability to close deals quickly. At the same time, you will be better prepared to accommodate newer sales reps and help support [ClientNameShortPossessive] continued growth.</p>

You Try It!

<i>Section</i>	<i>Content</i>
One-sentence summary of buyer's strategic goal	
One-paragraph current state summary	
One-paragraph problem statement, emphasizing impact on strategic goal	
Vendor-neutral solution recommendation (bulleted if multipart)	
Vendor-neutral summary of recommended selection criteria	

<i>Section</i>	<i>Content</i>
Summary of vendor qualifications as they relate to buyer's needs	
Lead-in to proposal reiterating strategic goal and ROI	