## Executive Summary Checklist

- Update the executive summary with each version of the document so the information is relevant and consistent.

- Organize the sections of the summary to match the sections of the body copy (formal structure) or in the order of importance based on the objective.

- Remove jargon, qualifying words (for example, “very”), technical terms, and acronyms.

- Highlight valuable information and findings with precise, factual data supported in the document.

- Use active, direct language tailored to the target audience’s expertise level and edit for passive writing.

- Delete repetitive information, recommendations, messages, or data.

- Format for readability with plenty of space between sections and clear headings that guide the reader.

- Use bullet points or tables (title and label) to list important points, recommendations, or findings.

- Adopt the appropriate tone for an internal or external audience (for example, “we” versus “the company”).

- Include the appropriate financial information for the intended audience, including the amount of funding you seek (if that is the objective).

- Remove cliches, buzzwords, or unnecessary phrases.

- Include examples from the body of the document and describe research methods and processes.

- Edit for brevity to keep it short.

- Include all the must-know information and delete unclear or unsupported content.

- Verify the headings and subheadings used in the summary match the body copy of the document.

- Include a conclusion and describe the desired outcomes, solutions, or recommendations.

- Verify that the summary stands alone and supports the objective if it is the only portion of the document that will be read.