smartsheet

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.