

How to

Write an effective Executive Summary

The Executive summary is the only part of a bid that is likely to be read by everybody involved in the decision making process. This makes it the single most important part of a bid. It is critically important that you create the right first impression. On average, you have about 30 seconds to grab a reader's interest. The executive summary is a snap-shot of the key elements of your entire bid. It is an essential part of your response that must stand-alone as a complete and articulate statement. It should demonstrate your understanding of the client and their needs. It identifies your proposed solutions and associated benefits. It details your capability and credentials and most importantly, it highlights what sets you apart from your competitors and why the client should appoint you. It is the one part of the bid that will be examined in detail by the decision makers and all stakeholders involved. In some cases a reader will not read past the executive summary, so it needs to be targeted, concise and convincing.

What structure should a good executive summary follow? An executive summary should be written in short, punchy sentences and use succinct language. It should use positive, pro-active vocabulary. On average it should be no more than two-pages long and should

feature the clients name more often than your own. It should make good use of white page space, a right hand call out margin and clear headings and formatting. All of these pointers will ultimately make the executive summary easy to read, easy to digest and engaging. The content and flow of the executive summary should roughly follow the following format:

1. The headline – grabbing the reader's attention

Think about when you read a newspaper. The wording of a headline will often decide whether you read the rest of the article or not. The executive summary headline is exactly the same. Often in large font at the head of the page, this is the "hook" that will draw in the reader and make them want to read on. It should consist of two or three, short sentences. The first should be a summary of what the client is trying to achieve with the project; the ultimate objective. The second should be the most compelling reasons why you should be chosen to undertake the services you are tendering for.

2. The introduction

This should be one or two short paragraphs explaining your understanding of the project. It should be factual and accurate. It should demonstrate to the client a thorough understanding of what is to be undertaken. This should be used as a lead in to the project drivers and client hot buttons.

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3. The client hot buttons

Firstly, what is a “hot button?” A hot button is a problem, issue or motivator — the things that are really important to the client, you may have heard the old adage about understanding “what keeps them awake at night”, this question is to identify the potential hot buttons.

The next question is how do you identify the right hot buttons? Ultimately this is about knowing your client. If you have previous experience with them, what have been the issues they have faced in the past? If you have a good relationship with them, why not be up front and ask them? If not, organise a storyboarding session with the full bid team. Discuss what the potential issues are, group them together into similar themes and rank them in importance to the client. Ideally you want to include no more than the top five in the executive summary. Choosing the right hot buttons will guarantee that you grab the client’s attention. Use the hot buttons as sub-headings and then detail how your proposed solution will mitigate these issues. This is where you snap-shot the relevant highlights of your methodology.

4. Outline the solution

Under each hot button you need to outline your solution, giving the client peace of mind that you are addressing their needs. How does your solution solve their needs and hot buttons? Why is it the best solution? But it doesn’t end there.

To really sell yourself there are two further steps.

5. Benefits

Having explained your proposed solution you need to go on to apply the benefits by unveiling the real value that your solution will bring. What can you do better than the competition?

6. Don’t take our word for it – the power of proof

Finally, prove your statements by giving evidence, references or examples of past performance with similar clients, or experience of where your proposed methodology has successfully worked on comparable projects. This gives the client peace of mind that you are a safe pair of hands; you have done this before and with great results.

7. The summary

Finally wrap up with a summary that runs to a maximum of two paragraphs. Again you are looking to highlight the most compelling reasons why you should be appointed.

When should you write the executive summary?

Every proposal should contain an Executive Summary. The recommended technique is to begin drafting the executive summary first, even before work has commenced on the production of the rest of the tender document. Ensure that the storyboard session to identify the hot buttons and project drivers includes the full bid team. Once a

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first draft is complete it should be issued to the wider bid team. The executive summary should then become a road-map for the team when writing the rest of the bid document. When the bid document is complete, review the executive summary again to ensure that all of the points made resonate throughout the responses and that you have captured all of the unique selling points of your proposal.

Covering letters

Often forgotten or overlooked is the covering letter or email cover text that is attached as part of the delivery of the final proposal. It can be argued that this is as important, if not more so than the executive summary itself. This is the first piece of communication that the client will read. It is, therefore, just as important that you get this right. Make it bespoke, concise and to the point. Ensure that it is engaging and leaves the reader feeling inspired to read your proposal in depth.