Guidelines for Executive Summaries

The executive summary is a condensed version of a management report that is separate from the actual report. It reveals the report's findings, recommendations and financial impact. It is sent both to the executive(s) in question with the report and to individuals in the company who do not receive the full report. The purpose is to highlight all of the necessary information presented in the report.

Writing Executive Summaries

There are several key points to remember in writing an executive summary:

- First, write the executive summary after you have completed the report.
- Second, engage your reader's attention, make a good impression, and convey only the necessary information.
- Third, include important data, conclusions, recommendations, and expected results. Do not include the history of the topic or items that the reader will already know. The summary should tell the reader why you have written the report and your general findings or recommendations.
- Fourth, as mentioned previously, executive summaries are short. The length of executive summaries will vary depending on the length of your reports. In most cases, it should be about one tenth of the length of the original document.
- If you are having trouble getting started, imagine that you have to leave a voice mail message for a person who is reviewing your report and have less than five minutes to convey all of the important information. What are the critical things that you want him or her to know? What is the report about? What did you discover? And, what are your recommendations?

An executive summary can be organized as follows:

- Presentation of issue (problem) and purpose
- Description of scope, significant considerations, limitations and alternatives
- Explanation of analysis and decisions
- Final recommendations

Compare the effectiveness of the next two summaries:

1. A specimen of steel was tested to determine whether a job lot owned by Canadian Pacific Railways could be used as structural members for a short span bridge to be built at Churchill in northern Manitoba. The sample proved to be G40.12 structural steel, which is a good steel for general construction but subject to brittle failure at very low temperatures.

   Although the steel could be used for the bridge, we consider that there is too narrow a safety margin between the -54°C temperature at which failure could occur and the -48°C minimum temperature occasionally recorded at Churchill. A safer choice would be G40.8°C structural steel, which has a minimum failure temperature of -70°C.

2. This report describes the degree of radioactive contamination along the surface of transport aircraft. It represents a survey of the measurements that were conducted between 1992 and the middle of 1995. It discusses measurement results, various measurement methods, and control
measurements most easily performed by the airline companies. Weather factors are of great importance for radioactive dust deposits. The extent of danger due to radioactive dust deposits and a number of protective measures are discussed with a number of regulations and directives by Transport Canada.

The first is an effective executive summary; it contains enough information so that someone can make a decision as a result of reading two paragraphs. The second is more of a summary or abstract and would necessitate the manager's reading the entire report before making a decision.

Example:

Executive Summary

Work demands and family responsibility have increasingly come into conflict as mothers have become a large part of the workforce, and fathers have begun to share in the caregiving responsibilities. Working parents at Insurance Agency B need to care for their children. What benefits can be obtained from the employer and employee by encouraging Insurance Agency B to provide a daycare center during work hours? Childcare programs can benefit employers by decreasing absenteeism, providing higher productivity, and having a lower turnover rate. Developing a program at work can make it easier for parents to balance their work and family responsibilities at Insurance Agency B.

This report concerns Insurance Agency B and its attempts to establish a daycare center. Surveys are given to employees, and three interviews occur with a working parent and two managers.

The 19 completed surveys determined if employees have childcare needs and what these needs are. The survey also determined how the company is affected. Nine employees (47 percent) missed a full day each in the past six months because of childcare difficulties or because a child was sick. Ten (53 percent) employees had minor problems with their ability to do their job well and the levels of stress experienced. Over half of the employees (n=14) have children under the age of 12 and usually need childcare during work hours. Twelve employees (63 percent) think one of the most important requirements is the need for more employees than ever before to handle childcare while they work.

Unscheduled absenteeism reported to supervisors as being caused by illness or personal problems, in some cases, actually resulted from difficulties with childcare. Difficulty with childcare is considered to be the third largest cause of absenteeism in the company. Childcare service can cause commuting delays and tardiness for employees.

For this selected sample, respondents support and prefer care to be located at or near work. A childcare program can be an effective management tool that serves the goals of both the company and program participants as well. Company centers are one of the more expensive options for employers, but these centers represent the greatest potential for solving a wide variety of childcare needs if properly designed.

Setting up a daycare program on site at Insurance Agency B can be accomplished as a non-profit organization with a board of directors consisting of parent and company representatives.
The reader can look at the executive summary above and understand what is contained in the report without reading the entire document. As the full report might not be distributed to everyone, the executive summary must stand on its own, since it is likely to be read by people who do not have all of the information in front of them.

**References**

This handout was prepared using the following sources:

"BP Executive Summary." http://qsilver.queens.ca/~mckirdyj/nv/executive_summary.html (February 16, 1999)

"Executive Summaries Complete the Report." http://www.csun.edu/~vcecn006/summary.htm (February 16, 1999)

"Writing a Business Report Executive Summary." http://www.sheridanc.on.ca/~randy/rap.dir/sumintro/html (February 16, 1999)
