

# Executive Summary Template

A one-page template for any board paper, investor pitch, business plan or proposal.

## HOW TO USE THIS TEMPLATE

Write the full document first, then return to this page. Fill in each section in order. Replace every example with your own specifics. Aim for 250 to 500 words across all five sections. Read it aloud and ask "so what?" after every sentence. If you cannot answer, delete that sentence.

### 1 HEADLINE — one sentence

*The decision, recommendation or answer. Lead with the outcome. Include a number and a timeframe. First five words carry all the weight.*

**EXAMPLE:** Invest £40M in a new customer platform or lose £120M in revenue over three years.

### 2 WHY IT MATTERS — one sentence

*The single reason this decision is on the table. Frame it in the language of the reader, not the writer.*

**EXAMPLE:** Our current platform cannot support the SKU growth required by the 2027 European expansion.

### 3 EVIDENCE — two to three sentences

*The numbers, market signals or operational facts that justify the recommendation. Specifics only. No ranges, no hedges.*

**EXAMPLE:** Customer acquisition cost has risen 34% in 18 months as competitors run loyalty programmes we cannot replicate. The new platform unlocks personalised pricing for our top quartile, which McKinsey benchmark data shows lifts net revenue by 9 to 12%.

### 4 RISKS AND TRADE-OFFS — two sentences

*Front-load the bad news. Executives hate surprises more than problems. State the biggest risk and the most credible mitigation.*

**EXAMPLE:** The migration takes eleven months and creates two quarters of margin pressure. A phased rollout starting with the UK business de-risks the full European cutover.

### 5 ACTION REQUIRED — one sentence

*What you need from the reader, by when and from whom. Approval, signature, capital, vendor selection. Make the next step impossible to misread.*

**EXAMPLE:** We are seeking Board approval at the 15 July session to allocate £12M to the FY26 budget and authorise vendor selection.

## FINAL CHECKLIST BEFORE YOU SEND IT

- ✓ Total length 250 to 500 words
- ✓ First sentence is the recommendation
- ✓ Every paragraph passes the "so what?" test
- ✓ Numbers are specific, not ranges
- ✓ Bad news appears here, not buried
- ✓ No passive voice. Every action has an owner
- ✓ Anyone in the room could decide from this page
- ✓ Written last, after the full document

Created by Dan Ilett · Full guide and worked examples at [theexecutivesummary.com](https://theexecutivesummary.com)