Executive Summaries & Introductions

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Introductions & Executive Summaries

▸ An introduction helps your reader know what to look for

   ▸ And to identify the main idea and the supporting points.

▸ Everything you write should have some association with your introduction.

▸ An Executive Summary tells the reader everything that is in the report within one page or a few pages for a long report.

The introduction

The body - detailed

Purpose of an Executive Summary

▸ Communicate the main idea of the report.

▸ Tell the whole story in brief:

  ▸ Introduce your subject matter at a strategic level

  ▸ Address those who will read no more of the report

  ▸ Include what was done, achieved, concluded or recommended

▸ Before you begin writing the summary, ask yourself:

  ▸ What is your report about?

  ▸ Why is it important?

  ▸ What is included in the report?

  ▸ What is included in each major section?

▸

Purpose of an Introduction

‣ Communicate the main idea of the report

‣ Highlight the main points and provide some context or background

‣ Identify the report's:

   ‣ Authorization

   ‣ Purpose

   ‣ Scope

   ‣ Criteria

‣ Provide information on:

   ‣ Location

   ‣ Timing

   ‣ Budget

‣

Difference between an Executive Summary and an Introduction

‣ Executive Summaries:
  ‣ Must stand alone and be understood separate from the report.
  ‣ Tell the whole story
  ‣ Are only included in longer reports (6+ pages)

‣ Introductions:
  ‣ Set the stage but don't necessarily tell everything
  ‣ Are simpler than an executive summary
  ‣ All reports have an introduction

‣ The <u>conclusion</u> usually restates the aim of the report and summarizes what the report has recommended or concluded.

Length

These are guidelines only.

- For short reports (15 pages of text or less):
  - Executive summaries: one page
  - Introductions: 1-4 short paragraphs
  - Conclusions: 1-4 paragraphs, not as short

- For longer reports
  - Executive Summary: up to 10% of the total report
  - Introductions: 1-2 pages plus background and context
  - Conclusions: 1-4 pages or more, recommendations may be included or separate depending on the complexity

Executive Summaries

Style

- Be clear and concise
- Tend toward using short paragraphs
- Write directly to your audience, especially the most senior or important of your readers
- Get your reader interested in what is to come
- Project confidence so your reader trusts your credibility
- Bullet points are appropriate, especially for highlighting important points

Content

- Only include material present in the main report
- Structure it in the same order as the main report
- Include your main ideas at the highest level
- Leave out any detail
- Refer to your major recommendations
- Include a concluding paragraph
- Ensure it can be read and understood separately from the main report

Basic Format of an Executive Summary

- Who
- What
- Where
- Project or Issue Description
- Objectives
- Other relevant info
- Conclusion

The end result:

▸ A successful executive summary should leave the reader with confidence in understanding:

  ▸ the general nature of the subject

  ▸ important points of controversy (if any)

  ▸ decisions that need to be made (if any)

  ▸ required actions with their cost/benefit quantified (if possible)

  ▸ recommendations (if appropriate).

  Courtesy of Thomas F. Piatkowski, "Executive Summary Style Guide," 2006.

▸ The reader should also gain confidence in your knowledge and expertise.

Opening Line: Who & What

- Introduces the report itself. For example:

  - Raffle & Associates Engineering Ltd. has been retained by Acme Developments Inc. to undertake a Site Study for the proposed mixed use development at 123 Main Street.

  - This study considers the location of a third store as a way of increasing overall sales for the Company.

  - Pedrona is a growing company with clear ambitions for further growth.

Project Detail

- Next provide more detail about the project.
  - The product features include….
    - As well as….
  - The project is in the preliminary planning stage and changes to the scope may yet occur…
  - The site is currently occupied by…
    - …. will be removed/retained in order to…."
  - "The Stakeholders provide input in to…."

Describe the Project

- The product will…
- The development will…
- The project team is…
- Key stakeholders include…
- The site is currently zoned for…
- The proposal calls for…
- The municipality intends to…
- Sustainability principles are…
- Current market conditions are…
- The Plan for the Department is to…

Report Objectives

- Outline the purpose and scope of the report.
- This report will:
  - Estimate
  - Examine
  - Identify
  - Develop (ideas, concepts, strategy)
  - Study
  - Evaluate
  - Recommend
  - Etc.

Other relevant information

- Extraordinary or unusual details
- Anything that significantly impacts decisions to be made. E.g.:
  - Possible future development
  - Particularly complicated project conditions
  - Significant limitations in capacity
  - Unusual safety considerations
  - Political implications
  - Stakeholder involvement
  - Controversy
  - Legislation
  - Expected market changes
  - Expected actions by the competition

Introduction & Conclusion

The Introduction

- **Provides necessary background:**
  - Who commissioned or requested the report
  - The project problem or purpose
  - Major issues to be addressed
  - Basic background information necessary for understanding the report. For example:
    - Locations
    - Volumes
    - People or agencies
    - Dates
    - Previous work
- **Provides specifics but no analysis.**

Conclusion

- Three or more general sentences or paragraphs (depending on the length of the report) that sum up the report and its findings in its entirety.
  - E.g. This report documents the analysis, findings and recommendations of the Study for…
  - We found… and therefore recommend…

Conclusion

▸ Is a close parallel to your introduction.

▸ Draws a logical interpretation from the facts of your report.

  ▸ Check your logic.

▸ Sums up your findings.

▸ Is usually free from opinion other than your recommendation.

▸ Has <u>no new </u>information.

Assignment

▶ Write an <u>Introduction</u> for a 10-15 page report evaluating the current state of customer service for <u>one</u> of Canada's big 3 cel phone providers. Assume there is also an ES.

▶ First, distinguish between what should go in the ES and what should go in the introduction.

▶ Report Objective: to address weaknesses in the current customer service system

▶ At the request of the VP of Customer Service in preparation for a new company wide Strategic Plan that will be drafted in the next 6 months.

Read Chapter 9, p. 217

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