



## ■ BUSINESS TOOL: SAMPLE EXECUTIVE SUMMARY

### ■ RATIONALE AND APPLICATION:

This (part of a full document) provides the reader with an overview of the key issues from a strategic and/or business plan. The primary aim is to communicate the essence of the plan, namely background, mission, analysis, strategic aims and objectives and other salient factors. The reader should be able to gain an overview and understanding of the main critical issues and facts.

### LIMITATIONS AND ERRORS OF APPLICATION

- Too much detail and verbose
- Too long, should be ideally between one and two pages
- Written before the plan is finished

### ■ EXAMPLE

The \_\_\_\_\_ is a registered charity and established as a company limited by guarantee. It was established in \_\_\_\_\_ and operates within the \_\_\_\_\_ area of Leicester. The project has been developed as a partnership between local young people and youth workers, community groups and the statutory authorities. The project's mission is:

“ \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ ”

The first year of operation \_\_\_\_\_ has been grant funded from \_\_\_\_\_, current staff being a full time project manager with administrative support. The initial year is a development one focusing on the building, capital fund-raising, the practical operation of the project and the fitting out and furnishing of the building.

The project has a strong management committee, drawing from the statutory sector, the local community, young people and voluntary sector organisations.

This \_\_\_\_\_ year business plan is split into two main areas. It looks at the development year and then when the project is planned to be operational.

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The plan puts forward four strategic aims.

The first is to \_\_\_\_\_

The second is to \_\_\_\_\_

The third is to \_\_\_\_\_

The fourth is to \_\_\_\_\_

The plan sets out how this strategy can be achieved with backing from our current and future partners, self-generated income and the operation of the project from \_\_\_\_\_.

The project strongly reflects the principles of the charity and its sponsors and has drawn on good practice from the United Kingdom and Europe. It aims to be a model for the future, a project to take Leicester into the next century.

Notes

- a. Can be expanded to, say, include patrons, current partners etc.
- b. As for item (a) above this can be expanded.

## ■ FURTHER POINTS

An executive summary should be modified based on who the target audience is, and whether they are an internal or external member. If the summary is for an internal audience (e.g. employees) then it may include

- Goals and objectives of the plan
- Resources required to achieve the plan
- Identified obstacles and how these will be overcome

If the summary is for an external audience, such as funders, clients and network partners then it should include

- Brief description of your organisation, products and services
- Amount and type of funding and support required
- How the funding and support will be used
- Financial summary