

Executive Summary Worksheet

Complete this worksheet during your proposal kick-off meeting, gaining collective agreement before finalizing each section. Once complete, distribute the executive summary to each team member to use as guidance throughout the proposal development process.

Overall Value Proposition (The Elevator Speech)

In 1–2 concise sentences, state how your firm’s key features will benefit the prospect and help them achieve their objectives. Focus on results, using language that is specific and measurable.

Understanding of the Prospect’s Challenges and Objectives (We Get You)

In 1–2 paragraphs, state your firm’s understanding of the prospect’s needs, challenges, and pain points, followed by what ideally will be required to satisfy each. Avoid simply restating the RFP scope of work.

Approach to Accomplishing the Prospect’s Objectives (We Really Can Do It)

In one paragraph, state how your firm will address the prospect’s needs/challenges. In lieu of an overview, highlight specific, compelling aspects of your firm’s approach. Directly address any perceived weaknesses, as needed.

Why Your Firm Is Ideally Suited to Serve the Prospect (What You’ll Get Out of It)

Using the exercise below, state the top 2–4 key benefits your firm will provide to the prospect, including evidence (features) that you can deliver each. Reminders of these benefits should be included throughout the proposal.

Prospect Need or Pain Point	Feature/Evidence <i>You’ll address it by providing them with...</i>	Benefit <i>That’s good for the prospect because...</i>

Next Steps (So You Should Take This Action)

In one sentence, reiterate your overall value, followed by a call to action for the prospect (e.g., invitation for an oral presentation, beginning the first step of the engagement).

Quality Checklist

Once the information in your worksheet is completed, agreed to, and transferred to your executive summary draft, check to ensure that the document satisfies each of the following persuasive criteria.		✓
<i>Simplicity and Conciseness</i>	Is the executive summary two pages or less?	
	Are only 2–4 key benefits highlighted?	
	Can any content be cut without disrupting your persuasive messaging?	
<i>Prospect Focus</i>	Is the prospect’s name used at least three times as much as your firm’s name?	
	Is the executive summary absent of boilerplate content (e.g., firm history, profile)?	
<i>Messaging</i>	Is the overall value proposition consistent with the rest of the executive summary?	
	Is an understanding of the prospect’s needs made clear and explicit?	
	Is evidence provided that you can deliver each stated benefit?	
<i>Purpose</i>	Does the executive summary condition the reader to score your firm high?	