**[](https://www.smartsheet.com/try-it?trp=11402&utm_source=integrated+content&utm_campaign=/content/executive-templates-ms-word&utm_medium=Executive+Summary+doc+11402&lpa=Executive+Summary+doc+11402&lx=PFpZZjisDNTS-Ddigi3MyABAgeTPLDIL8TQRu558b7w)EXECUTIVE SUMMARY CHECKLIST**

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| --- | --- |
| EXECUTIVE SUMMARY CHECKLIST  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO | |
|  | Update the executive summary with each version of the document so the information is relevant and consistent. |
|  | Organize the sections of the summary to match the sections of the body copy (formal structure) or in the order of importance based on the objective. |
|  | Remove jargon, qualifying words (for example, “very”), technical terms, and acronyms. |
|  | Highlight valuable information and findings with precise, factual data supported in the document. |
|  | Use active, direct language tailored to the target audience’s expertise level and edit for passive writing. |
|  | Delete repetitive information, recommendations, messages, or data. |
|  | Format for readability with plenty of space between sections and clear headings that guide the reader. |
|  | Use bullet points or tables (title and label) to list important points, recommendations, or findings. |
|  | Adopt the appropriate tone for an internal or external audience (for example, “we” versus “the company”). |
|  | Include the appropriate financial information for the intended audience, including the amount of funding you seek (if that is the objective). |
|  | Remove cliches, buzzwords, or unnecessary phrases. |
|  | Include examples from the body of the document and describe research methods and processes. |
|  | Edit for brevity to keep it short. |
|  | Include all the must-know information and delete unclear or unsupported content. |
|  | Verify the headings and subheadings used in the summary match the body copy of the document. |
|  | Include a conclusion and describe the desired outcomes, solutions, or recommendations. |
|  | Verify that the summary stands alone and supports the objective if it is the only portion of the document that will be read. |

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