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

Description automatically generatedEXECUTIVE SUMMARY OUTLINE**

**TEMPLATE for WORD**

Optimize your business plan or report with this basic executive summary template. Use the template to help summarize your project and give your audience a high-level understanding of your proposal. As the first section of your proposal or report, this executive summary template enables you to identify the problem your target audience is facing, propose a solution, offer analysis to support your findings, and propose next steps to implement your recommendations.

A close-up of a person's legs

Description automatically generated with low confidence

EXECUTIVE SUMMARY OUTLINE

PROJECT

TITLE

Company Name

00/00/20XX

* STAKEHOLDERS
* PROJECT OVERVIEW
* GOALS, ASSUMPTIONS, & MEASUREMENTS OF SUCCESS
* COMPETITIVE ADVANTAGE
* RISK FACTORS
* PROJECT MILESTONES
* DOCUMENTATION & REPORTING
* PROJECT COST & RESOURCE ESTIMATE
* CONCLUSION & COMMENTS

TABLE OF CONTENTS

STAKEHOLDERS

|  |  |  |
| --- | --- | --- |
| PROJECT  SPONSOR | **Stakeholder Name** | Commissions delivery of the project; provides vision and direction; assumes responsibility for the project |
| FUNDING  SPONSOR | **Stakeholder Name** | Obtains funding for the project |
| PROJECT OWNER | **Stakeholder Name** | Confirms that there is a need for the project; validates objectives; provides specifications; monitors the overall delivery of the project |
| PROPOSAL FACILITATOR | **Stakeholder Name** | Provides support during the project proposal phase |

|  |  |  |
| --- | --- | --- |
|  | STAKEHOLDER NAME | STAKEHOLDER ROLE |
|  |  |  |
|  |  |  |
| ADDITIONAL STAKEHOLDERS |  |  |

PROJECT OVERVIEW



Briefly describe what your report or business proposal will entail and why it’s necessary.

Condense your project proposal into a few short sentences. This will help you clearly communicate your idea to management, key stakeholders, and potential investors.

Background pattern

Description automatically generatedGOALS, ASSUMPTIONS, & MEASUREMENTS OF SUCCESS

|  |  |
| --- | --- |
| GOALS | • Point One  • Point Two  • Point Three |
|  |  |
| ASSUMPTIONS | • Point One  • Point Two  • Point Three |
|  |  |
| MEASUREMENTS OF SUCCESS | • Point One  • Point Two  • Point Three |

A picture containing monitor, indoor

Description automatically generatedCOMPETITIVE   
ADVANTAGE

Describe how this project will allow you to deliver a higher quality   
or more affordable product or service.

EXAMPLE

Currently, our online competitors either market 100 percent wool t-shirts as activewear base layers, or they market t-shirts with a Merino wool count of less than 150 as high-quality fashion items. This leaves a marketing gap that we can fill with our t-shirts by marketing them as both high-end everyday wear and functional activewear.

Logo, icon

Description automatically generatedRISK FACTORS

* Industry   
   & Market Risks
* Budgetary   
   Risks

INDUSTRY & MARKET RISKS

Describe any factors that might impact the entire industry.   
These factors can be either positive or negative.

EXAMPLE

Current political tensions in the countries where we source our natural fibers may disrupt trade routes and cause delays in production that prevent us from meeting customer demand.

Logo, icon

Description automatically generated

BUDGETARY RISKS

Describe any factors that might render your cost assumptions and estimates inaccurate.

EXAMPLE

Over the last year, supply chain disruptions have increased our production costs by 10 percent. If supply chain disruptions continue to worsen, we will need to find other cost mitigation strategies to keep our prices low.

Logo

Description automatically generated



PROJECT MILESTONES

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ID | MILESTONE | STATUS | BASELINE COMPLETION DATE | EXPECTED COMPLETION DATE |
|  |  |  |  |  |
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Description automatically generatedDOCUMENTATION   
& REPORTING

Provide a description of documentation and reporting processes.

Include information on how you will standardize processes like incident reporting, quality assessment (QA), and status report sharing.

A picture containing text

Description automatically generatedPROJECT COST &   
RESOURCE ESTIMATE

Provide details regarding total project cost and resource estimates.

Explain not only your cost and resource estimates for the project, but what method you used to arrive at them.

CONCLUSION   
& COMMENTS

Provide a brief conclusion that summarizes everything you’ve covered in your executive summary. Explain why your solution is perfect for addressing the target audience’s needs. End by outlining the next steps needed to move forward with your proposed solution.



|  |
| --- |
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