Executive Summary Checklist

Opportunity Name:

Customer / Client:

Date: Author / Owner:

Section 1 – Audience Focus

□ Have we clearly identified the customer's key drivers (mission, strategic priorities, pain points)?
□ Is the executive summary written for decision-makers, not technical evaluators?
□ Is the language customer-focused ('you/your') rather than 'we/our'?

Section 2 – Customer Challenge

□ Is the customer's problem, gap, or opportunity clearly stated?
□ Have we aligned our understanding with their stated objectives (from ITT, dialogue, or strategy papers)?
□ Do we demonstrate empathy and awareness of their environment?

Section 3 – Our Solution / Value Proposition

□ Is the proposed solution described at the right level (high-level benefits, not technical detail)?
□ Have we highlighted why our solution is better (differentiators)?
□ Are benefits expressed in terms of outcomes for the customer (savings, performance, compliance, risk reduction)?

Section 4 – Evidence & Credibility

□ Have we backed up claims with proof points (case studies, metrics, customer testimonials)?
□ Are risks acknowledged with clear mitigation approaches?
□ Do we reference relevant partnerships, track record, or innovations?

Section 5 – Call to Action

□ Does the summary close with a clear, positive action (e.g., next steps, partnership intent)?
□ Is the tone confident but not over-promising?
□ Does it leave the reader with a compelling reason to select us?

Section 6 – Quality & Review

□ Has the document been reviewed for clarity, conciseness, and impact?
□ Are there any jargon-heavy or internal terms that should be simplified?
□ Is the document visually engaging (headings, white space, graphics) without clutter?