

The Golden page: improving your Executive Summary

Scope and objective

The Executive Summary is a critical part of any paper, along with the Purpose statement and in some cases the recommendations. First impressions count. This note provides some tips and tricks to make that first page – we call it the ‘Golden page’ – a winner.

Make sure the Executive Summary gets the paper off to a good start

This section sets the scene for the whole paper, and may very well colour the readers’ impression of the paper overall – particularly before they start reading the substantive content!

So it’s worth taking the time to absolutely nail the first page or two, rather than doing it as an afterthought. Focus on the ‘need to know’ material. Make it memorable.

The Executive Summary serves many purposes

We know Councillors read their papers ahead of meetings. But a busy Councillor will prioritise their efforts on the most important issues, and the issues they are most personally interested in. The Executive Summary can assist with this prioritisation.

So, for those less concerned with a particular subject, the Executive Summary may very well get more attention than the remainder of the paper.

The Executive Summary is also a ‘refresher’. A Councillor may read it again just ahead of a meeting, or indeed in the meeting, to remind them of the key issues.

It also may form the basis for Council officers to introduce their papers at a Council Sub-Committee meeting, as is often the practice.

Make sure it has impact

Start with the problem definition to grab Councillors’ attention. Be clear about the scale of the issue, its priority and what decision is required or what action needs to be taken. This will help him/her judge how much time and effort needs to be put into this paper.

Language is important. Short sentences and crisp paragraphs have greater impact. Focus your editing on ease of reading and comprehension when writing or peer reviewing an Executive Summary.

Try this as a shape for your Executive Summary

Action	• We recommend that you...
Objective	• ...in order to....
Sales pitch	• Taking this approach will...
Risks	• Media/stakeholder/trade-offs
Close	• Next steps are...

Executive Summary versus key points

A succinct set of key points can do the job just as well or better in other settings. Your choice may well depend on your Councillors’ preferences. This may vary between a formal Council meeting, or a paper prepared for a workshop session involving Councillors and officers.

Our preference is to use a key points section. Its title directs the author to pull out only the essentials for busy Councillors, rather than trying to summarise every section and argument.

But whatever the preference, the same general points regarding purpose, impact, and content apply.

Avoid repetition

Don’t repeat things at the beginning of the paper. It gets boring, wastes space and can turn off the reader. Rules of thumb to consider are:

- If it’s a really short paper don’t bother with an Executive Summary – use the Purpose statement to provide a super-summary instead. This should cover what the Council must do, why, and when.¹
- Avoid noting recommendations that just repeat the content of the Executive Summary, unless they are formally required e.g. in some legal processes they remain important.

¹ For example: “You need to sign the attached letters by 10 June to encourage these Board members to renew their terms.”

Look at the Purpose statement, Executive Summary and recommendations together – they should be a package. Make sure they aren't repetitive, yet cover what's needed.

Often we see advice papers where these three parts aren't clearly a package e.g. the purpose of the paper might not be played out in the recommendations or recommendations appear that aren't set up by prior content. This seriously detracts from the quality of the paper, and can worry the decision-makers, as it looks like the advice hasn't been well thought through.

Writing the Executive Summary first, or after the paper is written?

Some authors write the Executive Summary first, then the rest of the paper. This allows the issue to be boiled down first, and then expanded upon later. It makes sure that the structure of the paper is aligned with the Executive Summary.

Others do it in reverse to make sure the Executive Summary is consistent with the flow of the paper.

We don't have strong views on this. It's a matter of personal preference and both can work. But make sure that:

- The critical 'need to know' matters are included in the Executive Summary.
- The structure of the paper supports the Executive Summary.
- There is a clear logical flow between the Executive Summary and the recommendations.

Critical to either approach is the need to have done the thinking and analysis before starting to write the paper.² We call this the 50:50 rule: half of your time should be spent cracking the problem, and this should happen well before you open the briefing template on your computer.

Using a whiteboard to shape the Executive Summary with a colleague or two can be a very helpful way of boiling down the issues and testing ideas at the same time.

Always edit again once the paper is completed to make sure the Executive Summary is consistent with the content and structure of the paper, and supports the recommendations.

Use subheadings

We know there are times when Executive summaries need to be slightly longer. For example, in an omnibus-type paper, like those associated with long term plans or rates setting, in which many separate, but related, issues are discussed and decisions recommended. Use subheadings to make it clearer, just as you would within a paper. Make sure they help tell the story, and break up the text into manageable chunks.

Test your Executive Summary by trying it as a presentation or an elevator pitch

Essentially the Executive Summary should do the same job as an oral introduction to the paper that Chairs of Council sub-committees or officers may give, before formal discussion of a paper starts.

Doing this is about condensing the issues, and clearly identifying what is required of decision makers.

Trying this out with a colleague is a good way of testing whether your Executive Summary does the job.

Don't shy away from including carefully chosen data or metrics. These can strengthen the particular arguments and improve the impact of an Executive Summary by capturing the Councillors' attention. They can often be the points that are remembered and quoted to support any decision later.

Make the Executive Summary a focus of peer review

Peer review should give significant focus to the Executive Summary for all the reasons outlined above. An extra hour spent on the Executive Summary can make an enormous difference to its impact.

Try having a different peer reviewer look at the Executive Summary once the paper is complete to ensure it stands alone and meets the needs of a time-pressured decision-maker.

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² Papers where the author is developing their thinking as they type are usually easy to spot and very hard to read!