

UNIT - III

Subject :Writing for Special Purpose

Subject Code:CSEN 44

Easy to read style:

Easy Read combines text with layout and imagery to simplify and explain information. Users often print Easy Read materials. The standard layout works as a handout.

Guidance

Create Easy Read to broaden access

Identify user needs

Engage Easy Read experts

Design and publish materials to download

Plan the structure

Keep text simple

Involve others as you draft

Follow a standard Easy Read layout

Provide context

The aim of Easy Read is to give more people access to information.

Easy Read Style is a way to present information for people who are not familiar with English, or who have low literacy or learning disability. Easy Read's unique layout and style presents information so it's easy to understand. The content can explain complex information about law, policy or obligations.

Easy Read often involves using images to complement the text. It can be a good basis for translating content into other languages.

Identify user needs

Before starting, make sure you do research with people who will use the information. Find out how they will access the materials – in print, online or with support from others.

Not everyone will find Easy Read useful: check the findings from your user research. You might find people prefer other formats, such as video or a webpage.

Engage Easy Read experts:

It is best to engage Easy Read experts. They will know how to research and communicate with specific user groups. They will also have expertise on design. Easy Read professionals are experienced in connecting language and imagery to help users understand and consume information.

Design and publish materials to download:

Design your Easy Read materials as a printed handout to be used by people in several scenarios. For example, employers, support workers, family or carers might use the materials to talk something through with people who need to use the information.

Make Easy Read materials available in addition to any source material they are derived from.

Publish them in HTML and as an accessible PDF at the same time as the source material.

Users need to be able to print or download the Easy Read version from the same site as the source material.

Print considerations

Publishing Easy Read as a PDF means it may be read online or printed. When you have links in the materials, you need to: provide clear link text and make sure it looks like a link
spell out the URL next to the linked text.

Accessibility considerations

User needs:

I can follow the design, structure and language of the content.

Fundamentals:

Follow W3C updates on making content usable for people with cognitive and learning disabilities. Make the structure of Easy Read PDFs accessible to help people who will need to download them from the website. Make all government content accessible to people with disabilities. This includes providing information that is timely, which is part of Australian law under the Disability Discrimination Act 1992.

Guidance on EPUB and PDF accessibility:

Overview of the EPUB specification

EPUB accessibility, PDF techniques for WCAG 2.0 – W3C, General techniques for WCAG 2.0 – W3C, Accessibility for Adobe Acrobat – Adobe, and Accessibility for Adobe InDesign – Adobe

Plan the structure:

Think of the Easy Read version as a summary of the source material. This helps you plan the structure and determine the level of detail to include.

Identify the main points to cover and decide how to explain them. Include examples throughout to help explain ideas and concepts. Your research will help you decide if you need images. Ask your Easy Read expert to help you choose images users can relate to and understand. Users will be drawn to the images first to derive meaning, before looking at the adjacent text.

Keep text simple:

Easy Read follows some plain language principles – such as using simple words and sentences – but Easy Read and plain language are different.

Differences between Easy Read and plain language

Easy Read:

1. Focus is on simplicity
2. Text and images carry the meaning
3. Large font size
4. Often, another person reads the content to the intended user

Plain language:

1. Focus is on clarity
2. Text carries the meaning
3. Standard font size
4. Content is read by the intended user

Check your content reads between a year 4 to year 6 reading level. Use simple words and grammar, but don't use childish language if the users are adults.

Difficult words:

Some important words might be hard for people to read and understand. A difficult word might have 3 or more syllables. If you need to use a difficult word, write it in bold.

Define the difficult word in the next sentence or phrase.

If you have defined a lot of words, include a glossary at the end of your document. Call it a word list.

Example: Image of gloved hand using a needle on a child's left shoulder to immunize them accompanied by simple text explaining vaccinations, Immunization protects your baby from some diseases, Immunization means a doctor or nurse gives your baby a needle with a vaccine inside. The vaccine is the medicine that protects your baby from some diseases.

Avoid questions in the text:

Only use questions in headings for Easy Read Style. Questions in the text can make some people anxious. They might feel that they have to answer and worry about how to respond. If you need information from people, follow questions with practical examples so people know how to respond. Ask your Easy Read professional to help you design these materials.

Example

Drawing of a volunteer with questionnaire text about job status to the right of the drawing

A heading in Easy Read that is phrased as a question

Involve others as you draft

Involve people from your target user group as you write, design and test the materials. They can help you to choose imagery and to use terms they use themselves.

Ask your Easy Read professional to help you find or create images that convey meaning.

When you finish the draft, check with the original author to make sure you have the meaning right.

Keep your Easy Read brief. This is not always possible for complex information. In that case, think about whether you can divide the content into a few documents. Check if this decision will meet user needs.

Follow a standard Easy Read layout

Easy Read layout creates a relationship between images and text.

Use a consistent layout and minimum design elements so it's easy for people to use or explain.

Your agency might have an Easy Read publishing template. Find out before using a table grid to format images and text.

Tables help to align images and words. If you use them, follow accessibility requirements for tables. When designing the Easy Read material, code tables using the role="presentation" attribute.

In a standard Easy Read layout:

1. Use wide margins and plenty of white space to make the text easy to read.
2. Use at least 1.5 line spacing.
3. If you're using images, place them on the left to align with the text on the right.
4. Don't put images above the text or vice versa.
5. Left-align the text.

6. To format text: Use at least size 14 font for text and a larger size for headings.
7. Only use bold for headings and difficult words.
8. Be careful using text effects – any change to the shape of letters makes them more difficult to read.
9. Use colour and contrast to make words stand out, but don't rely on colour to convey meaning.
10. Print considerations
11. Don't split paragraphs and sentences across pages in print and PDF documents.
12. Insert page numbers in print and PDF documents, in the same font size as your text.
13. Use matte paper stock: it reduces glare off the page.
14. Include your agency or department logo on the cover page only.
15. Provide context
16. Users need to understand the reason for the material, how to use it and how to find out more.

At the beginning of the content:

introduce your organisation

explain how to use it – images with text, difficult words and links

add words to reassure people that it's okay to ask someone else to help them read it

explain how the Easy Read relates to other content – as a summary or guide

provide a URL or a hyperlink to the standard version (for digital content)

include a list of contents if there are several pages.

At the end, add:

where people can find more information

a word list if there are a lot of difficult words

'contact us' information.

You might add:

A word count, information about other services, other resources, Release notes, and Easy read is new to the digital edition.

Strengthening a weak Memo:

Memorandums, or memos for short, are used in place of formal letters for internal communication. These may be used in the workplace to present information, to provide directions or reminders, or to propose an idea.

While memos are often succinct, they can be very difficult to write precisely because you need to get straight to the point to get your ideas across. A poorly written one may confuse your superiors or your colleagues, and precious time may be wasted when they prepare their own memos to seek clarification on what you wrote. This article provides some tips that you can follow to impress your colleagues with your memo writing skill.

A memorandum, or memo for short, is quite easy to put together. In their most basic form, memorandums are just a short form of a letter. There may be a heading written in bold or italics

for emphasis. Additionally, the memo may address a certain issue or request permission to do something from an upper level executive.

A memo is a written business communication that conveys basic information. Using a simple, straightforward format makes that easy. You should always check whether your workplace has a standard form for memorandums. If not, follow the steps below for a universally acceptable memo format.

Title: The word "Memorandum" should be in a significantly larger font, bolded and either centered or placed in the top left-hand corner.

Recipient: Begin this heading with "TO:" and write down your recipient(s).

Source: Immediately after the recipient, write "FROM:" along with your name and position.

Subject: Write a short summary of the memo's purpose (no more than about four words).

Date: Include the date of when the memo is sent.

Keeping to strict styles like this improves clarity and avoids the danger of poor grammar or unclear communication.

Before you write

Before you put anything on paper, consider the following first:

Audience. Who are the intended recipients of your memo? Knowing your audience will not only allow you to identify who to address it to, but also determine the tone of the document you will be writing.

Purpose. The purpose of the memo will also affect how you write the document. Providing a list of instructions will require a more formal and professional tone, while an announcement regarding a company outing or party may be written in a festive manner.

Parts of a memo

Memo formats may differ depending on the workplace. Most, however, have the following parts:

Label. Some offices require for this document to bear the label "MEMORANDUM" or "MEMO" at the top of the page so that your readers will immediately know what type of document it is.

However, not all workplaces have this rule. Do make it a point to study the standard memo format followed in your office so you can adjust accordingly.

Heading. The memo heading contains the following details:

To: This is where you write down the recipients of the memo. Addressees may be colleagues (do write their full names and job titles) or units or departments within the office.

From: Write down your name and job title

Subject: Indicate the reason for the memo

Date: Note the complete date

Body. Use this section to provide the pertinent details regarding the issue at hand. Try to be as specific and concise as possible.

Conclusion. The conclusion is usually just 1-2 sentences long and indicates what action you are expecting from the recipient of the memo.

Tips for Writing a Memo:

Below are tips you can follow to make sure that you produce memos that are consistently well-written.

Be SMART-Memos should be SMART – Specific, Measurable, Attainable, Relevant, and Time-Bound- Be clear not only about what you want to say, but what you expect your reader to do.

Don't use informal language-Memos, by their nature, need to be written in a professional manner. As such, do avoid colloquial language.

Be succinct- As mentioned earlier, memos should go straight to the point. Avoid flowery language and adding unnecessary details so that your readers will know exactly what you're trying to say.

Present the main point within the opening paragraph. Make it easier for your reader to understand what the memo is about by stating the gist of it within the first paragraph.

Salutations are not necessary in memos.

Break down the memo. If your memo is long, consider breaking it down into smaller chunks to make it easier for your readers to understand what you want to say. Consider using subheadings to break down sections of your memo. If, you want to raise several points in your memo, you use bullet points to make it easier for your readers to understand each specific issue that you will bring up.

Don't use emotionally-charged words or language. Never use emotive words, even when writing about issues such as a team member's poor performance at work. Doing so will make your report seem subjective. Maintain professionalism by outlining the details using a detached but polite tone. For instance, instead of saying that a colleague shows "unprofessionalism", you can instead provide concrete examples of his/her conduct to justify your memo.

Proofread-Before you release the memo, make sure that you proofread it to see if there are any factual, grammatical, or spelling errors in what you wrote. You may also want to review it to see if there is a way for you to simplify it further to make it more easily understood by your audience.

Practice makes perfect, so try to draft your own memos and ask a colleague to review them to hone your memo writing skills.

Here are a few quick tips for writing effective memorandums:

Check for stylistic requirements with your job. Does the company have a standard form when it comes to writing memos? If so, is it downloadable?

Make sure that the body of the text is clear, concise and grammatically correct.

Keep things simple. Avoid long sentences and wordy phrasing.

Do not use a salutation. You should simply go right into the subject of the memo.

Use bulleted lists and headings to convey your message.

Conclude the memo with any closing statements that may inspire the recipient to take action.

Mention any and all attachments at the end of the memo by using the single word "Attachment."

Once you've completed a draft, share it with a colleague. An extra pair of eyes always helps to catch errors and improve readability.

Writing Your Memo

Open with an introductory paragraph in which you introduce the purpose of the memo. You can start your memo with a sentence as simple as "the purpose of this memo is to..." Once you state the purpose, you can move forward to the next section.

The next section of your memo would be to describe the issue surrounding your memo. Next you will want to discuss what you have done to better research the issue surrounding your memo. Include as much basic information as possible. Additionally, if confirmation is needed from the recipient, you will need to make sure that you stipulate that clearly.

To state all relevant information in the shortest space available, take a look at our advice on informative essays. Keep the differences between business writing and academic writing in mind; memos should follow the rules of business writing.

You need not try to squeeze a lot of information into the memo because it is not necessarily a project proposal. The whole purpose of a memo is to make the recipient aware of an issue. If you keep it simple, it will be an easy task.

TO: All Employees

FROM: John Realman, Facilities Manager

SUBJECT: Building Remodel

DATE: October 6, 2019

The purpose of this memo is to update all employees on the scheduled building cleaning and maintenance and ensure cooperation.

A crew will be repainting the parking lots on Tuesday. Please park in the indoor garage, which will be free of charge on Tuesday for this purpose.

Power-washing of the building facade will begin Wednesday. As much of the cleaning as possible will be performed outside operating hours, but some may coincide with work. Please keep phone use to headsets and earpieces rather than speaker to avoid excess noise on calls.

Window-washing will take place Thursday from 10 to 4.

Cleaning and remodeling of the building's interior will begin on Friday.

As a thank you for your patience with the process, Friday will be an offsite team building day.

Free drinks and snacks will be available at Matt and Mike's Grill

We on the Maintenance team are grateful for your cooperation. Your patience with this process will be rewarded with a beautiful, more ergonomically friendly building.

We request that all employees read this memo. Please direct any questions to realman@realco.com.

Again, we thank you for your patience.

Writing for special purpose:

Several types of texts:

- Academic
- Business
- Marketing

Ever Better offers writing services in English and Portuguese, comprising text editing and revision. We help you develop academic, personal, and business texts by discussing ideas, organizing the text, and finally supervising all the writing process. In the end, you will be sure to have a high quality text, which you can post or publish successfully anywhere.

There are three elements that combine to create a specific purpose: your own interests and knowledge, the interests and needs of your audience, and the context or setting in which you will be speaking.

A specific purpose starts with one of the three general purposes and then specifies the actual topic you have chosen and the basic objective you hope to accomplish with your statement. Basically, the specific purpose answers the who, what, when, where, and why questions for your statement.

Getting Specific

When attempting to get to the core of your language (the specific purpose), you need to know a few basic things about your language. First, you need to have a general purpose. Once you know whether your goal is to inform, persuade, or entertain, picking an appropriate topic is easier. Obviously, depending on the general purpose, you will have a range of different types of topics. For example, let's say you want to give a statement about hygiene. You could still give a statement about hygiene no matter what your general purpose is, but the specific purpose would vary depending on whether the general purpose is to inform (discussing hygiene practices around the globe), to persuade (discussing why people need to adopt a specific hygiene practice), or to entertain (discussing some of the strange and unique hygiene practices that people have used historically). Notice that in each of these cases, the general-purpose alters the topic, but all three are still fundamentally about hygiene.

pose will increase the likelihood that your audience will find your speech meaningful.

Second is the "what" question, or the basic description of your topic. When picking an effective topic, you need to make sure that the topic is appropriate for a variety of constraints or limitations within a speaking context.

Third, you need to consider when your context will be given. Different speeches may be better for different times of the day. For example, explaining the importance of eating breakfast and providing people with cereal bars may be a great topic at 9:00 a.m. but may not have the same impact if you're giving it at 4:00 p.m.

Fourth, you need to consider where your content will be given. Are you giving a statement in front of a classroom? A church? An executive meeting? Depending on the location of your writing, different topics may or may not be appropriate.

The last question you need to answer within your writing is why. Why does your audience need to hear your write up? If your audience doesn't care about your specific purpose, they are less likely to attend to your context. If it's a topic that's a little more off-the-wall, you'll really need to think about why they should care.

Once you've determined the who, what, when, where, and why aspects of your topic, it's time to start creating your actual specific purpose. First, a specific purpose, in its written form, should be a short, declarative sentence that emphasizes the main topic of your statements.

Basic Tips for Creating Specific Purposes

Now that we've examined what specific purposes are, we are going to focus on a series of tips to help you write specific purposes that are appropriate for a range of statements.

Audience, Audience, Audience:

First and foremost, you always need to think about your intended audience when choosing your specific purpose. In the previous section, we talked about a context where a author is attempting to persuade a group of journalism students to not take jobs as embedded journalists. Would the same context be successful, or even appropriate, if given in your public speaking class? Probably not. As a writer, you may think your topic is great, but you always need to make sure you think about your audience when selecting your specific purpose. For this reason, when writing your specific purpose, start off your sentence by including the words "my audience" or actually listing the name of your audience: a group of journalism students, the people in my congregation, my peers in class, and so on. When you place your audience first, you're a lot more likely to have successful writing.

Matching the Rhetorical Situation:

After your audience, the second most important consideration about your specific purpose pertains to the rhetorical situation of your article. The rhetorical situation is the set of circumstances surrounding your language (e.g., speaker, audience, text, and context). When thinking about your specific purpose, you want to ensure that all these components go together. You want to make sure that you are the appropriate speaker for a topic, the topic is appropriate for your audience, the text of your language is appropriate, and the language is appropriate for the context. For example, speeches that you give in a classroom may not be appropriate in a religious context and vice versa.

Make It Clear:

The specific purpose statement for any lesson should be direct and not too broad, general, or vague. Consider the lack of clarity in the following specific purpose: "To persuade the students in my class to drink more." Obviously, we have no idea what the speaker wants the audience to drink: water, milk, orange juice? Alcoholic beverages? Furthermore, we have no way to quantify

or make sense of the word “more.” “More” assumes that the students are already drinking a certain amount, and the author wants them to increase their intake. If you want to persuade your listeners to drink eight 8-ounce glasses of water per day, you need to say so clearly for your specific purpose.

Another way in which purpose statements are sometimes unclear comes from the use of colloquial language. While we often use colloquialisms in everyday life, they are often understood only by a limited number of people. It may sound like fun to have a specific purpose like, “To persuade my audience to get jiggy,” but if you state this as your purpose, many people probably won’t know what you’re talking about at all.

Don’t Double Up:

You cannot hope to solve the entire world’s problems in one statement. so don’t even try. At the same time, you also want to make sure that you stick to one specific purpose. Chances are it will be challenging enough to inform your audience about one topic or persuade them to change one behavior or opinion. Don’t put extra stress on yourself by adding topics. If you find yourself using the word “and” in your specific topic statement, you’re probably doubling up on topics.

What is an Executive Summary?

An executive summary is the first section of a business plan or proposal that provides a brief overview of the document and contains its main points. In other words, it is a condensed version of a complete business plan or proposal. It is primarily used in the business world, but its application in academia is also possible.

Breaking Down Executive Summary

Generally, an executive summary is relatively short, with an average length of one to four pages. It should be written in short paragraphs, using clear and concise language appropriate for the target audience. One should know well the target audience of the document to convey the message as clearly as possible. In addition, the summary must have a similar structure and flow as the main document.

The executive summary must not be confused with an abstract of the document. The abstract is a complementary overview of a larger document that does not provide much value to the reader by itself. On the other hand, the executive summary is a shorter version of the main document and can be read separately because it provides all the key points of the document.

Components of the Summary

Despite the fact that the components of the executive summary may vary depending on the specifics of the main document, some major parts are still presented in the majority of the summaries. The key components typically include:

Overview of a company/business

Identification of a main problem or proposition

Analysis of a problem or proposition, with supporting facts, data, and figures

Possible solutions and their justifications

Clearly defined conclusions

Importance of an Executive Summary

The primary goals of the executive summary are to provide a condensed version of the main document, such as a business plan, and to grab the attention of the reader(s). Since the readers of the business plans and reports (investors, lenders, and C-level executives) generally do not have time to read all the lengthy documents they receive, a well-written summary can help you to grab their attention and subsequently achieve your business goals.

As the executive summary is the initial representation of the complete document, it should cover the main parts of a plan or proposal and indicate the points that are elaborated on in the final document.

Contact Sales

View Demo

PROJECT PLANNING

|

HOW TO WRITE AN EXECUTIVE SUMMARY, WITH ...

How to write an executive summary, with examples

Julia Martins contributor headshotJulia MartinsDecember 11th, 2020•8 min read

How to write an executive summary, with examples article banner image

Try Asana now

One of the best things about project management is that it provides a way to plan, manage, and execute all of your team's work. Oftentimes, it's helpful to have this information available at-a-glance. But sometimes, new project members or executive stakeholders want a simplified view of your project. Instead, you need a concise way to share the project's main points—without losing your reader's attention.

The best way to do that is with an executive summary. If you've never written an executive summary, this article has all you need to know to plan, write, and share them with your team.

What is an executive summary?

An executive summary is an overview of a document. The length and scope of your executive summary will differ depending on the document it's summarizing, but in general an executive summary can be anywhere from one to two pages long. In the document, you'll want to share all of the information your readers and important stakeholders need to know.

Plan projects with Asana

Imagine it this way: if your high-level stakeholders were to only read your executive summary, would they have all of the information they need to succeed? If so, your summary has done its job.

You'll often find executive summaries of:

Business cases
Project proposals
Research documents

Environmental studies

Market surveys

Project plans

In general, there are four parts to any executive summary:

Start with the problem or need the document is solving.

Outline the recommended solution.

Explain the solution's value.

Wrap up with a conclusion about the importance of the work.

What is an executive summary in project management?

In project management, an executive summary is a way to bring clarity to cross-functional collaborators, team leadership, and project stakeholders. Think of it like a project's "elevator pitch" for team members who don't have the time or the need to dive into all of the project's details.

Read: 15 creative elevator pitch examples for every scenario

The main difference between an executive summary in project management and a more traditional executive summary in a business plan is that the former should be created at the beginning of your project—whereas the latter should be created after you've written your business plan. For example, to write an executive summary of an environmental study, you would compile a report on the results and findings once your study was over. But for an executive summary in project management, you want to cover what the project is aiming to achieve and why those goals matter.

The same four parts apply to an executive summary in project management:

Start with the problem or need the project is solving. Why is this project happening? What insight, customer feedback, product plan, or other need caused it to come to life?

Outline the recommended solution, or the project's objectives. How is the project going to solve the problem you established in the first part? What are the project goals and objectives?

Explain the solution's value. Once you've finished your project, what will happen? How will this improve and solve the problem you established in the first part?

Wrap up with a conclusion about the importance of the work. This is another opportunity to reiterate why the problem is important, and why the project matters. It can also be helpful to reference your audience and how your solution will solve their problem. Finally, include any relevant next steps.

If you've never written an executive summary before, you might be curious about where it fits into other project management elements. Here's how executive summaries stack up:

Executive summary vs. project plan

A project plan is a blueprint of the key elements your project will accomplish in order to hit your project goals and objectives. Project plans will include your goals, success metrics, stakeholders and roles, budget, milestones and deliverables, timeline and schedule, and communication plan.

An executive summary is a summary of the most important information in your project plan. Think of the absolutely crucial things your management team needs to know when they land in your project, before they even have a chance to look at the project plan—that's your executive summary.

Read: Proof of concept (POC): How to demonstrate feasibility

Executive summary vs. project overview

Project overviews and executive summaries often have similar elements—they both contain a summary of important project information. However, your project overview should be directly attached to your project. There should be a direct line of sight between your project and your project overview.

While you can include your executive summary in your project depending on what type of project management tool you use, it may also be a stand-alone document.

Executive summary vs. project objectives

Your executive summary should contain and expand upon your project objectives in the second part (Outline the recommended solution, or the project's objectives). In addition to including your project objectives, your executive summary should also include why achieving your project objectives will add value, as well as provide details about how you're going to get there.

The benefits of an executive summary

You may be asking: why should I write an executive summary for my project? Isn't the project plan enough?

Well, like we mentioned earlier, not everyone has the time or need to dive into your project and see, from a glance, what the goals are and why they matter. Work management tools like Asana help you capture a lot of crucial information about a project, so you and your team have clarity

on who's doing what by when. Your executive summary is designed less for team members who are actively working on the project and more for stakeholders outside of the project who want quick insight and answers about why your project matters.

An effective executive summary gives stakeholders a big-picture view of the entire project and its important points—without requiring them to dive into all the details. Then, if they want more information, they can access the project plan or navigate through tasks in your work management tool.

Read: Business requirements document template: 7 key components, with examples

How to write a great executive summary, with examples

Every executive summary has four parts. In order to write a great executive summary, follow this template. Then once you've written your executive summary, read it again to make sure it includes all of the key information your stakeholders need to know.

1. Start with the problem or need the project is solving

At the beginning of your executive summary, start by explaining why this document (and the project it represents) matter. Take some time to outline what the problem is, including any research or customer feedback you've gotten. Clarify how this problem is important and relevant to your customers, and why solving it matters.

For example, let's imagine you work for a watch manufacturing company. Your project is to devise a simpler, cheaper watch that still appeals to luxury buyers while also targeting a new bracket of customers.

Example executive summary:

In recent customer feedback sessions, 52% of customers have expressed a need for a simpler and cheaper version of our product. In surveys of customers who have chosen competitor watches, price is mentioned 87% of the time. To best serve our existing customers, and to branch into new markets, we need to develop a series of watches that we can sell at an appropriate price point for this market.

Contact Sales

View Demo

PROJECT PLANNING

|

HOW TO WRITE AN EXECUTIVE SUMMARY, WITH ...

One of the best things about project management is that it provides a way to plan, manage, and execute all of your team's work. Oftentimes, it's helpful to have this information available at-a-glance. But sometimes, new project members or executive stakeholders want a simplified view of your project. Instead, you need a concise way to share the project's main points—without losing your reader's attention.

The best way to do that is with an executive summary. If you've never written an executive summary, this article has all you need to know to plan, write, and share them with your team.

What is an executive summary?

An executive summary is an overview of a document. The length and scope of your executive summary will differ depending on the document it's summarizing, but in general an executive summary can be anywhere from one to two pages long. In the document, you'll want to share all of the information your readers and important stakeholders need to know.

Plan projects with Asana

Imagine it this way: if your high-level stakeholders were to only read your executive summary, would they have all of the information they need to succeed? If so, your summary has done its job.

You'll often find executive summaries of:

- Business cases
- Project proposals
- Research documents
- Environmental studies
- Market surveys
- Project plans

In general, there are four parts to any executive summary:

Start with the problem or need the document is solving.

Outline the recommended solution.

Explain the solution's value.

Wrap up with a conclusion about the importance of the work.

What is an executive summary in project management?

In project management, an executive summary is a way to bring clarity to cross-functional collaborators, team leadership, and project stakeholders. Think of it like a project's "elevator pitch" for team members who don't have the time or the need to dive into all of the project's details.

Read: 15 creative elevator pitch examples for every scenario

The main difference between an executive summary in project management and a more traditional executive summary in a business plan is that the former should be created at the beginning of your project—whereas the latter should be created after you've written your business plan. For example, to write an executive summary of an environmental study, you would compile a report on the results and findings once your study was over. But for an executive summary in project management, you want to cover what the project is aiming to achieve and why those goals matter.

The same four parts apply to an executive summary in project management:

Start with the problem or need the project is solving. Why is this project happening? What insight, customer feedback, product plan, or other need caused it to come to life?

Outline the recommended solution, or the project's objectives. How is the project going to solve the problem you established in the first part? What are the project goals and objectives?

Explain the solution's value. Once you've finished your project, what will happen? How will this improve and solve the problem you established in the first part?

Wrap up with a conclusion about the importance of the work. This is another opportunity to reiterate why the problem is important, and why the project matters. It can also be helpful to reference your audience and how your solution will solve their problem. Finally, include any relevant next steps.

If you've never written an executive summary before, you might be curious about where it fits into other project management elements. Here's how executive summaries stack up:

Executive summary vs. project plan

A project plan is a blueprint of the key elements your project will accomplish in order to hit your project goals and objectives. Project plans will include your goals, success metrics, stakeholders and roles, budget, milestones and deliverables, timeline and schedule, and communication plan. An executive summary is a summary of the most important information in your project plan. Think of the absolutely crucial things your management team needs to know when they land in your project, before they even have a chance to look at the project plan—that's your executive summary.

Read: Proof of concept (POC): How to demonstrate feasibility

Executive summary vs. project overview

Project overviews and executive summaries often have similar elements—they both contain a summary of important project information. However, your project overview should be directly attached to your project. There should be a direct line of sight between your project and your project overview.

While you can include your executive summary in your project depending on what type of project management tool you use, it may also be a stand-alone document.

Executive summary vs. project objectives

Your executive summary should contain and expand upon your project objectives in the second part (Outline the recommended solution, or the project's objectives). In addition to including your project objectives, your executive summary should also include why achieving your project objectives will add value, as well as provide details about how you're going to get there.

The benefits of an executive summary

You may be asking: why should I write an executive summary for my project? Isn't the project plan enough?

Well, like we mentioned earlier, not everyone has the time or need to dive into your project and see, from a glance, what the goals are and why they matter. Work management tools like Asana

help you capture a lot of crucial information about a project, so you and your team have clarity on who's doing what by when. Your executive summary is designed less for team members who are actively working on the project and more for stakeholders outside of the project who want quick insight and answers about why your project matters.

An effective executive summary gives stakeholders a big-picture view of the entire project and its important points—without requiring them to dive into all the details. Then, if they want more information, they can access the project plan or navigate through tasks in your work management tool.

Read: Business requirements document template: 7 key components, with examples

How to write a great executive summary, with examples

Every executive summary has four parts. In order to write a great executive summary, follow this template. Then once you've written your executive summary, read it again to make sure it includes all of the key information your stakeholders need to know.

1. Start with the problem or need the project is solving

At the beginning of your executive summary, start by explaining why this document (and the project it represents) matter. Take some time to outline what the problem is, including any research or customer feedback you've gotten. Clarify how this problem is important and relevant to your customers, and why solving it matters.

For example, let's imagine you work for a watch manufacturing company. Your project is to devise a simpler, cheaper watch that still appeals to luxury buyers while also targeting a new bracket of customers.

Example executive summary:

In recent customer feedback sessions, 52% of customers have expressed a need for a simpler and cheaper version of our product. In surveys of customers who have chosen competitor watches, price is mentioned 87% of the time. To best serve our existing customers, and to branch into new markets, we need to develop a series of watches that we can sell at an appropriate price point for this market.

2. Outline the recommended solution, or the project's objectives

Now that you've outlined the problem, explain what your solution is. Unlike an abstract or outline, you should be prescriptive in your solution—that is to say, you should work to convince your readers that your solution is the right one. This is less of a brainstorming section and more of a place to support your recommended solution.

Because you're creating your executive summary at the beginning of your project, it's ok if you don't have all of your deliverables and milestones mapped out. But this is your chance to describe, in broad strokes, what will happen during the project. If you need help formulating a high-level overview of your project's main deliverables and timeline, consider creating a project roadmap before diving into your executive summary.

Continuing our example executive summary:

Our new watch series will begin at 20% cheaper than our current cheapest option, with the potential for 40%+ cheaper options depending on material and movement. In order to offer these prices, we will do the following:

Offer watches in new materials, including potentially silicone or wood

Use high-quality quartz movement instead of in-house automatic movement

Introduce customizable band options, with a focus on choice and flexibility over traditional luxury

Note that every watch will still be rigorously quality controlled in order to maintain the same world-class speed and precision of our current offerings.

3. Explain the solution's value

At this point, you begin to get into more details about how your solution will impact and improve upon the problem you outlined in the beginning. What, if any, results do you expect? This is the section to include any relevant financial information, project risks, or potential benefits. You should also relate this project back to your company goals or OKRs. How does this work map to your company objectives?

Continuing our example executive summary:

With new offerings that are between 20% and 40% cheaper than our current cheapest option, we expect to be able to break into the casual watch market, while still supporting our luxury brand. That will help us hit FY22's Objective 3: Expanding the brand. These new offerings have the potential to bring in upwards of three million dollars in profits annually, which will help us hit FY22's Objective 1: 7 million dollars in annual profit.

Early customer feedback sessions indicate that cheaper options will not impact the value or prestige of the luxury brand, though this is a risk that should be factored in during design. In order to mitigate that risk, the product marketing team will begin working on their go-to-market strategy six months before the launch.

4. Wrap up with a conclusion about the importance of the work

Now that you've shared all of this important information with executive stakeholders, this final section is your chance to guide their understanding of the impact and importance of this work on the organization. What, if anything, should they take away from your executive summary?

To round out our example executive summary:

Cheaper and varied offerings not only allow us to break into a new market—it will also expand our brand in a positive way. With the attention from these new offerings, plus the anticipated demand for cheaper watches, we expect to increase market share by 2% annually. For more information, read our go-to-market strategy and customer feedback documentation.

Example of an executive summary

When you put it all together, this is what your executive summary might look like:

Example executive

Plan projects with Asana

Common mistakes people make when writing executive summaries

You're not going to become an executive summary-writing pro overnight, and that's ok. As you get started, use the four-part template provided in this article as a guide. Then, as you continue to hone your executive summary writing skills, here are a few common pitfalls to avoid:

Avoid using jargon

Your executive summary is a document that anyone, from project contributors to executive stakeholders, should be able to read and understand. Remember that you're much closer to the daily work and individual tasks than your stakeholders will be, so read your executive summary once over to make sure there's no unnecessary jargon. Where you can, explain the jargon, or skip it all together.

Remember: this isn't a full report

Your executive summary is just that—a summary. If you find yourself getting into the details of specific tasks, due dates, and attachments, try taking a step back and asking yourself if that information really belongs in your executive summary. Some details are important—you want your summary to be actionable and engaging. But keep in mind that the wealth of information in your project will be captured in your work management tool, not your executive summary.

Make sure the summary can stand alone

You know this project inside and out, but your stakeholders won't. Once you've written your executive summary, take a second look to make sure the summary can stand on its own. Is there any context your stakeholders need in order to understand the summary? If so, weave it into your executive summary, or consider linking out to it as additional information.

Always proofread

Your executive summary is a living document, and if you miss a typo you can always go back in and fix it. But it never hurts to proofread or send to a colleague for a fresh set of eyes.

Clear Instructions:

Giving instructions and following instructions are today a part of our daily life. Elaborate instructions are given in manuals that come with audio and video gadgets. The rise of the do-it-yourself (DIY) culture has added to the importance of clear, simple instructions. As a shareholder, you often get instructions from companies on how to fill out forms, how to make payments, and how to exercise options.

There are also oral instructions. Dial a service on your phone, and they begin with, "For English, press 1." What happens after that would have amazed Alexander Graham Bell. On-screen instructions, too, can be found. "Press any key to continue" became something of a joke as people began to complain, "I can't find the 'any' key". This was added to when the computer said, "Keyboard not detected, press any key to continue."

Not many academic courses in India include instructions in their syllabi. Yet, you come across specimens of instructions which are badly written, incomplete, jumbled-up, and dangerously ambiguous.

The first lesson in writing good instructions says: Put the verbs in the imperative form. The imperative is the form you use to ask someone to do something. The verb comes first in the sentence. Here are some examples: Shake well before use. Do not smoke inside the laboratory. Keep out of reach of children. When a series of instructions are given sequentially, you use numbered lists. Sometimes instructions are written in the passive form, using the verb "should be". Example: The syringe should be discarded after a single use.

Bad instructions can be inconvenient if you have to retrace your steps after coming to a dead end. They can be costly if the equipment is damaged because of bad handling resulting from poor instructions. They can cause physical injury if safety notes are not included.

The numbered list can clearly indicate the sequence of the steps required. Before you set out to write instructions, be clear in your mind about the structure of the process you are dealing with. If the list of instructions is very long, say, you have more than a dozen of them, split them into shorter sections. A telephone manual has sections that tell you how to perform different tasks: storing numbers in its memory, recording greetings on an answering system, listening to messages recorded, erasing them. Sometimes minor instructions are nested within the major steps. Suitable indentation can be used to make them clear.

Like any other communication, instructions are written for particular audiences. It is important, therefore, to know who you are writing for. Do not assume that the user has prior knowledge of the steps required to be taken.

When an adept computer user explains to me how to burn a CD, I generally miss half of what he or she tells me. That is why some people believe that instructions should not be written by experts, as they know too much. The degree of technicality in the instructions depends on who you are writing for.

Instructions should be written in simple and clear language. Break the instructions into small steps. One instruction should be concerned with a single step. Combine only those that are very closely related and go together. Provide suitable headings to make things easier for the user. It is important to provide a list of the tools and instruments that should be within reach before you start the task. To find halfway through the process that you don't have the right spanner can be frustrating.

In modern-day instructions, you can make use of graphics. Usually, the manual provides an illustration of the unit, say, a telephone or a DVD player, with numbered parts and with clear labels. In the instructions, there is repeated cross-referencing to these illustrations. Some instructions are best presented as flow charts.

In a set of instructions, the don'ts are as important as the dos. Example: Don't keep your mobile phone close to a powerful magnet. A good set of instructions will alert the users on some

possible problems. It is here that special notes are added. Depending on the seriousness of the consequences, they are labelled "warning", "caution" or "danger". These notes should be placed before the instruction they relate to.

If possible, it will be a good idea to test the instructions on a group of typical users. Observe them, and also get feedback from them. Note the points where they misinterpret or misunderstand the instructions. Revise the instructions to remove these glitches.

Examples:

Flood warning: If this notice is under water, do not drive on the bridge.

—(in safari park) Elephants please stay in your car.

—Do not swallow: in case of ingestion please call the hospital.