



Executive summary template

About Simply Business

We're one of the UK's largest business insurance providers. Since we started life in 2005, we've helped three million small businesses and self-employed people find the protection that's right for them, from builders to bakers and personal trainers (we cover landlords, too).

How does it work?

Answer a few questions about your business and we'll show you quotes from a range of insurers. After you buy, our Northampton-based team will be with you through every step of your cover, whether you have questions about your policy or you need to make a claim.

Join over 600,000 customers and get your tailored policy in minutes.

What is an executive summary?

An executive summary is usually the first section in a longer business document, or it can be a short document in its own right. It gives readers a brief but comprehensive overview of a more detailed document or report without them having to go through the whole thing.

There are several types of documents that might need an executive summary, including:

- a client report
- a pitch for a new project
- a business plan
- a marketing plan
- investment proposal

How to write an executive summary

Use this template to write your executive summary, keeping it short, concise and tailored to your intended audience. Each section can be one paragraph and should include enough context for your plan to make sense to readers, without being overly detailed.

Your business

Write a short paragraph about your business. Make sure you include your business name and a short description of what it offers. You should also include insights into your industry, which will support the purpose of your document.

What sets you apart

Talk about your target market and competition, the problem your idea will solve, and what sets your business apart.

How you'll market your ideas

Briefly summarise two or three ways you'll market your idea to your audience.

How you'll operate

Describe your business structure and where you'll carry out your business activities.

Your projections

Mention sales projections for one or two years into the future, and when you expect to turn a profit.

The money you'll need

Talk about how much money you're asking for if this document will form part of a pitch for financial investment.

