One Page Executive Summary

Introduction: People get impatient reading through a long proposal. Summarizing the key points on one page makes life easier and forms the basis for a longer discussion. Five headings capture the key elements of most consulting proposals (beyond resources!) in an engaging way, avoiding the management language of 'assumptions', 'risks', 'best practices' and so on.

1. What are you trying to do
2. What others who have done this found hard
3. What the best have done to be successful
4. What are your options
5. What I recommend

The graphic below shows a completed example.

Purpose of the tool: To provide a one page summary of a consulting proposal.

Outcome of use of tool: Client ability to take in at a glance the key points before/during a discussion

Executive Summary: example

I. **What you are trying to do**:

- Make management functions support the operational mission and add value to the people on the front lines
- Align with fellow directorates (common vision, constant communication, direct linkage to management functions and key business processes)
- Ensure good communication between employees and management
- Be a good steward of government resources
- Create an office to conduct program reviews of department initiatives

II. **What others who have done this found hard**:

- You are very busy every day, all day but feel like not much gets done
- What you spend time on is determined primarily by that day's urgent crises and not based on what is most important
- So many things are "top priority" that, essentially, **NOTHING** is top priority
- A strong sense of mission drives everyone to work hard but not always in a way that works well with everyone else
- Projects you launch take on a life of their own, seem to lose the way, and don't stay connected to the goal you had in mind

III. **What the best have done to be successful**:

- Identify and enlist a core team
- Work with core team to pick top 3 or 4 things that absolutely must be accomplished
- List all projects the organization would need to do in order to accomplish the objectives
- Organize and prioritize the list of projects according to what must be accomplished
- Select a few that will be short and surely successful to get momentum, early successes to point to, get the team operating well, build confidence, and feeling powerful
- Fire up larger scale, longer term initiatives in light of successes from the first few
- Communicate and celebrate successes as they occur; learn what works and modify approach going forward accordingly

IV. **What are your options**:

- **Option 1:** Continue as you are now
- **Option 2:** Pick & enlist a core team and work with them, on your own, to set intent, identify projects, and launch and monitor them until they are successful
- **Option 3:** Get help to orchestrate and drive a set of steps to set intent, align and drive core team and guide key projects to success

V. **What I recommend**:

- Get experienced help to support your own leadership
- Pick and enlist core team
- Conduct core team workshops to set intent, build "gameboard" and "roadmap", list & select, staff and fund projects to launch, align and drive through to implementation
- Set up an Enterprise Program Management (EMP) office to help you schedule, track, communicate, drive the process and the initiatives to stay on track and in synch with your intent from "idea-to-benefit"