**EXECUTIVE SUMMARY CHECKLIST**

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|   | Update the executive summary with each version of the document so the information is relevant and consistent. |
|   | Organize the sections of the summary to match the sections of the body copy (formal structure) or in the order of importance based on the objective. |
|   | Remove jargon, qualifying words (for example, “very”), technical terms, and acronyms. |
|   | Highlight valuable information and findings with precise, factual data supported in the document.  |
|   | Use active, direct language tailored to the target audience’s expertise level and edit for passive writing. |
|   | Delete repetitive information, recommendations, messages, or data. |
|   | Format for readability with plenty of space between sections and clear headings that guide the reader. |
|   | Use bullet points or tables (title and label) to list important points, recommendations, or findings. |
|   | Adopt the appropriate tone for an internal or external audience (for example, “we” versus “the company”). |
|   | Include the appropriate financial information for the intended audience, including the amount of funding you seek (if that is the objective). |
|   | Remove cliches, buzzwords, or unnecessary phrases. |
|   | Include examples from the body of the document and describe research methods and processes. |
|   | Edit for brevity to keep it short. |
|   | Include all the must-know information and delete unclear or unsupported content. |
|   | Verify the headings and subheadings used in the summary match the body copy of the document. |
|   | Include a conclusion and describe the desired outcomes, solutions, or recommendations. |
|   | Verify that the summary stands alone and supports the objective if it is the only portion of the document that will be read. |

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