**[A green sign with white text

Description automatically generated with medium confidence](https://www.smartsheet.com/try-it?trp=9227&utm_source=integrated+content&utm_campaign=/executive-summary-templates&utm_medium=Executive+Summary+Proposal+doc+9227&lpa=Executive+Summary+Proposal+doc+9227&lx=PFpZZjisDNTS-Ddigi3MyABAgeTPLDIL8TQRu558b7w)EXECUTIVE SUMMARY PROPOSAL TEMPLATE**

|  |  |  |  |
| --- | --- | --- | --- |
| **PROJECT TITLE** |  | | |
| **SUBMITTED BY** |  | **SUBMITTED TO** |  |
| **PHONE / EMAIL** |  | **RECEIVER  PHONE / EMAIL** |  |
| **DATE  SUBMITTED** |  | **PROJECTED  START DATE** |  |

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| Provide Name, Title, Phone, and Email Address for each stakeholder below. | |
| **PROJECT SPONSOR** Commissions delivery of and champions project; Provides vision and direction; Accepts responsibility | |
|  | |
| **FUNDING SPONSOR** Person / department obtaining budget required | |
|  | |
| **PROJECT OWNER** Confirms need for project and validates objectives; Provides specs, monitoring, overall delivery | |
|  | |
| **PROPOSAL FACILITATOR** Proposal preparation support | |
|  | |
| **ADDITIONAL STAKEHOLDERS** | |
| **STAKEHOLDER NAME** | **STAKEHOLDER ROLE** |
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| **PROJECT NAME AND DESCRIPTION** |
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| **PURPOSE / GOALS** |
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| **ASSUMPTIONS** |
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| **MEASUREMENTS OF SUCCESS** |
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| **RISK FACTORS** |
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| **APPROACH** |
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| **SCOPE OF WORK** | |
| **FUNCTIONS / PROCESSES IMPACTED BY PROJECT** | |
| **IN SCOPE** |  |
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| **OUT OF SCOPE** |  |
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| **UNCERTAIN** |  |
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| **INTERDEPENDENCIES / REPLACEMENT / CONSOLIDATION WITH OTHER SERVICES, PROJECTS, AND SYSTEMS** | |
| **IN SCOPE** |  |
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| **OUT OF SCOPE** |  |
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| **UNCERTAIN** |  |
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| **TIMELINE / MILESTONES** | | | | |
| **OVERVIEW** |  | | | |
| **MILESTONE** | | | | **DEADLINE** |
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| **PROJECT COST AND RESOURCE ESTIMATE** | | | | |
| **OVERVIEW** |  | | | |
| **NEEDS / INVESTMENT** | | | | **COST** |
| STAFFING - TECHNICAL | | | |  |
| STAFFING - FUNCTIONAL | | | |  |
| CONSULTATION | | | |  |
| TRAINING / DOCUMENTATION | | | |  |
| HARDWARE | | | |  |
| SOFTWARE | | | |  |
| OTHER | | | |  |
| **ESTIMATE TOTAL** | | | |  |

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