

## Executive Summary Worksheet (page one)

*Take the highlights from each section of the proposal and address the topics and questions listed below. You must be brief, concise and to the point. Cover each topic in three or four sentences or use a short bulleted list. Use original sentences; do not “copy and paste” from the proposal. To help the reader quickly proceed through the summary, use headings, organized lists and plenty of white space. If needed, certain topics can be combined. For example, the “Overview of the Solution,” “Instructional Solution” and “Technical Solution” can all be group under one heading titled “Solution.”*

**Description of Problem:** Describe the need(s) of the organization. Provide any insights your organization has concerning the need of the client. Do not be afraid to list the needs using bullets. This section of the executive summary establishes that your company “knows the client’s industry” and can understand their unique and individual needs within the greater context of their industry (use of industry statistics can be effective in this section).

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**Overview of Solution:** Write a high level synopsis of your solution. Since this is the opening description of your solution, provide any innovative or creative detail that makes your solution unique. You may want to list the items that you will provide to address the client’s need.

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**Instructional Solution:** Provide information on how you plan to design, develop and deliver the instructional aspects of the solution. You may want to indicate the number of hours of instruction you will develop or the number of screens or objectives addressed.

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## Executive Summary Worksheet (page two)

**Technical Solution:** Describe the technical aspects of the solution in layperson terminology. Provide enough detail so that a person can understand the basics of the technology involved, but spare the techno-speak. This section should provide the executives and managers enough detail so that your solution seems reasonable but not too complex.

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**Project Management and Schedule:** This section conveys to the client that your organization not only understands and can describe how to solve the needs of the client, but that you can actually implement your solution. This section includes mention of the duration of the project (start date and end date). It also discusses briefly how you plan to manage the project in terms of communicating with the client. If the project is broken into phases or steps, this is a good place to briefly describe each step or phase.

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**Deliverables:** This section describes what tangible items the client will own once the project is complete. This section is often combined with the “Project Management and Schedule” section.

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**Budget:** What is the price of the project? Put the price of the project into the executive summary; otherwise, it looks like you have something to hide. You may want to refer to the price as an investment, however, the title of this section needs to match the title or heading for the budget contained within the RFP. If there are multiple pricing options, list each option. To make the price more palatable, you may want to break the budget into smaller increments (i.e. one price for the learning portal and one price for the developed lessons). However, provide a “Grand Total” or several totaled options of all items proposed. Do not make the client add it up—clients find that annoying.

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**Executive Summary  
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**Project Team:** Who will be performing the work on the project? Describe how long the members of the project team have worked together (i.e. how many projects they have completed together, how many years they have worked together, how many years they have combined in the industry or in the area of instructional design). You may want to provide titles as well as the name of each individual on the core team. If a large team is involved, simply mention the key team members and their unique role throughout the life of the project. You want to convey to the client that the team is competent, talented and capable of completing the project on time and within budget.

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**Corporate Capabilities:** What is the background and reputation of the company? What other project has the company successfully completed? Name some large, well-known customers served by the company. Explain the company's experience in supplying solutions similar to your client's or similar solutions to different types of clients. You may want to include Quality Assurance and Risk Mitigation information.

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