

Executive summary template

Template from Noter AI — <https://www.noterai.net/templates/executive-summary-template>

EXECUTIVE SUMMARY

Subject: [Topic in six words or fewer]. [Decision needed by DATE, or: for information, no action needed]
From: [Name] Date: [Date]

THE ASK

We recommend [specific action]. We need [name] to [approve / sign / fund / choose] by [date], because [the hard deadline that drives it].

THE SITUATION

[What changed, with the number that makes it matter.]

[Why the current path stops working.]

[Why it cannot be left until next quarter.]

WHAT WE DECIDED

- [Decision 1, stated as a completed choice, not a topic discussed.]
- [Decision 2.]
- [Decision 3.]
- Still open: [the thing not yet settled], owner [name], by [date].

WHAT IT COSTS

Money: [amount, and over what period]

Time: [how long, whose time]

Risk we are accepting: [the one thing most likely to go wrong]

If there is a real choice, add the options here:

Option	Cost	Time to switch	Main risk
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[A]	[amount]	[weeks]	[what could go wrong]
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[B]	[amount]	[weeks]	[what could go wrong]
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WHAT WE NEED FROM YOU

[Name] to [action] by [date].

[Name] to [action] by [date].

MORE DETAIL IF YOU WANT IT

[Where the full notes, transcript or report live. One line, one link.]

RULES THAT MAKE IT WORK

- One page, or about 250 words. If it is longer, it is not a summary.
- Lead with the ask. Never build up to it - an executive reads the first two lines and decides whether to continue.
- Decisions, not conversations. "Discussed pricing" is not a decision. "Agreed to hold pricing until January" is.
- Costs are not only money. Two engineers off launch work for three weeks is expensive.
- Every line in "what we need from you" has a name and a date. No passive voice: "approval will be required" - by whom, from whom, by when?
- Write the first sentence last.