**Executive Summary Evaluation**

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| ***Section of report*** *Range is 0.0 –4.4* | Form | **Content** |
| Introduction | Format allows quick access to info.  Compelling statement of interest.  Analysis goals and objectives.  Recommended strategy. | * Explains what the firm does. * There’s a compelling interest statement. * Does it note goals of the analysis? * Does it include a recommended strategy? |
| The Problem or Challenge | Opportunities & threats (competitor, industry and macro environment).  Strengths & limitations (resources, capabilities & core competencies). | Clearly discuss these elements:  Opportunities & threats (competitor, industry and macro environment).  Strengths & limitations (resources, capabilities & core competencies). |
| The Solution | Obvious & clear action statements.  Clear outline of action steps.  Clear timeline.  Clearly stated goals. | What do you want to the firm to do?  What steps need to be taken (logical & appropriate action plan for implementation).  How soon do we start; with what steps?  How will we measure success (criteria by which you evaluate success of changes). |
| Why Now | External circumstances driving change.  Internal resources for recommendation.  Compelling statement of urgency. | Explain:  External circumstances driving change.  Internal resources for recommendation.  Why change now? |
| Average |  |  |

**Executive Summary Outline**

No more than one page, no cover, citations, or table of contents, no less than 11 point, New Times Roman, no less than ½-inch margins, and 1.25 spacing (in *Word*, Home 🡪 Paragraph 🡪  🡪 Line Spacing 🡪 Multiple 🡪 type in 1.25 ). Mix any tables and figures into the text as they are mentioned.

INTRODUCTION

* Explain what the firm does.
* There’s a compelling interest statement.
* Does it note goals of the analysis?
* Include a recommended strategy?

The Problem / Challenge

Clearly discuss these elements:

* Opportunities & threats (competitor, industry and macro environment).
* Strengths & limitations (resources, capabilities & core competencies).

The Solution

* What do you want to the firm to do?
* What steps need to be taken (logical & appropriate action plan for implementation).
* How soon do we start; with what steps?
* How will we measure success (criteria by which you evaluate success of changes).

Why Now

Explain:

* External circumstances driving change.
* Internal resources for recommendation.
* Detail the need for change now.