

Clearly explain your value proposition

Make sure your message gets through to customer senior managers by writing engaging and persuasive Executive Summaries

An interactive workshop that teaches you how to make your Executive Summaries more coherent and persuasive ... and more likely to win

Research shows that the Executive Summary is often the only part of a bid response or proposal that is read by senior customer decision-makers. Learn how to make yours work for you using proven and flexible Shipleys tools and templates.

Does your team

- ✗ Disagree about what constitutes a good Executive Summary?
- ✗ Struggle to articulate why the customer should choose your offer?
- ✗ Produce Executive Summaries that tell the same story every time, regardless of the customer or opportunity?
- ✗ Develop the Executive Summary in isolation from the rest of the proposal?
- ✗ Scramble to write the Executive Summary at the last minute?

Learn how to

- ✓ Win more bids by giving the customer a business case for choosing you over the competition
- ✓ Plan an effective proposal or section by leveraging strategies developed by the sales or capture team
- ✓ Write with customer focus that makes the customer want to read your proposal – and buy from you
- ✓ Use the Executive Summary to keep the solution team and subject matter experts on-message
- ✓ Use the Four-Box structure, organised around client issues, to make the writing task much easier

This course is delivered in a single day, including breakouts to complete case study exercises and practice writing skills.

WHO SHOULD ATTEND?

- Bid sponsors and proposal leads
- Capture Managers
- Proposal Writers and Managers

“Great session for learning structured thinking and approach to writing successful executive summaries.”

“A well-structured training session with very good connectivity to other aspects of the business development process.”

“I will put the concepts I learned today into use across many aspects of my role.”

Actual comments from participants



COURSE CONTENTS

Customer Focus in Executive Summaries

- Recognizing customer focus
- **Exercise:**
 - Ranking Executive Summary effectiveness
 - Identifying customer focus indicators
 - Evaluating customer focus
 - Designing an Executive Summary structure

Uses of Executive Summaries

- External uses
- Internal uses
- Summaries evolve as they aid communication

Planning Executive Summaries

- Module objective
- Identifying the customer's hot buttons
- Using the Executive Summary Planning Worksheet
- **Exercise:** Completing the Planning Worksheet
- Visuals improve document comprehension

- Planning a visual and action caption

Organizing Executive Summaries

- Fundamentals of persuasive organization
- Options for organizing
- Using the Executive Summary Organizer
- **Exercise:** Beginning the Organizer

Writing Executive Summaries

- Open Box 1 with a theme statement
- Follow with a vision statement
- Link the vision to this purchase
- Introduce the customer's hot buttons in Box 2
- Present your solution in Box 3
- Close with summary and next steps in Box 4
- **Exercise:** Drafting your Executive Summary

Examining Executive Summaries

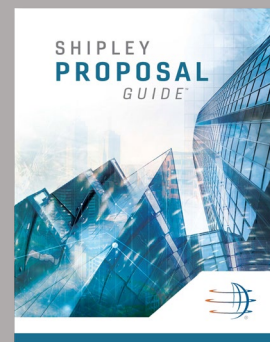
- Examination guidelines
- **Exercise:** Examining an Executive Summary

Revising Executive Summaries

- Revise your draft in three stages
- **Exercise:** Revising your Executive Summary

WORKSHOP MATERIAL

- Shipleys Proposal Guide
- Shipleys workbook with exercises
- Tools and templates



DIGITAL BADGE AND CERTIFICATION

On completion of the workshop you will receive a **digital badge** which you can share via social media.



This training can also contribute to your certification in Shipleys best practice.



For more information about how to achieve certification, check out our website.