

Bard Center for Entrepreneurship
Recommended Executive Summary Components (2-4 pages)

1. Introduction

- Your business idea or concept

2. Business Overview

- Value proposition- financial

3. The Market Opportunity (the problem, the customer's pain)

- Why is this such a great idea? Define the problem, describe the pain.
- Competitive analysis (how the problem is not being solved by competitors); what makes you better, faster, cheaper.

4. Market Solution

- Product or service
- Description of a working model or prototype, if appropriate
- How you will remove the pain, solve the problem
- Ability to create barriers to entry

5. The Market

- Identification of customer(s)
- Market size, analysis and forecast

6. Management Team

- Founders and key management
- Industry experience, education
- If you need to hire key management, describe the positions and ideal characteristics of the candidates.
- Why is this team uniquely qualified to run this Company and be successful

7. Financial Analysis/Uses of Funds

- Explain the amount of capital you need and provide detailed uses of those funds.
- Outline overall financial model with detailed projections through Year 3
- Including pro forma cash flow and budget analysis
- Other analysis, as appropriate (i.e. break even analysis)

Example Outline (Synopsis of 3 page Executive Summary)
local VC provided great executive summary for tech company with this format

Company Name & Logo

Market Opportunity (200 words; paragraph & bulleted; figure)

What company does; technology solution; uses of the technology; market size and growth; opportunities created by government mandates; positioning of company in this environment.

Company Background (100 words)

History of company; funding; founders; current stage & needs.

Company Solution (200 words; bulleted)

What the company does in more detail, products & services; infrastructure; business processes

Company Value Proposition (200 words; paragraph & bulleted)

What the company is in the process of doing better, faster, cheaper than the competition.

Revenue Model & Financials (100 words)

How and when the business generates money. 3 to 5 year overview.

Capital Requirements (100 words)

Funding needed, if any, and stage of fund raising.

Competitive Differentiation (200 words)

Again, why this product/service offering is superior to existing technologies. Almost a summary of information provided above. Why this is a great product/service/company when compared to competitors.

Intellectual Property (100 words)

IP portfolio if any; status of IP protection; licensing agreements; etc.

Management Team (100 words; bulleted; key skills or experience of founders)

List of people, role in company, relevant educational or professional experiences.

Contact Information (20 words)

Names, emails, phone numbers

Financial Information (Tables)

Cash Flow Analysis;

Profit & Loss projection – 3 to 5 years

		Year 1	Year 2	Year 3	Year 4	Year 5
Revenues						
	Product revenue					
	Service revenue					
	<i>Total revenues</i>					
Gross Margin						
Operating Expenses						
	R&D					
	Business Development & Marketing					
	Sales					
	General & Administrative					
	<i>Total Expenses</i>					
EBIT						