Product and service executive summary

Summarize an offer and the evidence supporting its development, launch or improvement. Replace every bracketed prompt with your own verified content. Delete these instructions and any unused headings before sharing.

Prepared for: [Reader or organization]
Prepared by: [Name and role] Date: [Date]
Source plan or report: [Title, version and date]

Offer and customer need

[Name the product or service and the customer problem it addresses. State the purpose of this summary and the decision being considered.]

Products or services covered

[Product or service 1: name, purpose and key benefit. Product or service 2: name, purpose and key benefit. Product or service 3: name, purpose and key benefit. Delete entries that do not apply.]

Evidence and alternatives

[Summarize customer research, usage or sales evidence with dates. Identify relevant alternatives and explain a substantiated difference, not a claim of automatic superiority.]

Delivery and commercial approach

[Explain pricing or revenue approach, distribution, support and the resources needed to deliver the offer. Distinguish current arrangements from proposals.]

Performance and constraints

[Summarize actual results and separately labeled forecasts. State the period, units, assumptions and material quality, capacity or adoption risks.]

Recommendation and next step

[State the proposed decision, responsible owner, timing and success measure. Reference the supporting plan or report.]