

[COMPANY NAME]

Investor Update [Month Year]

Ø=ÜÝ TL;DR - Executive Summary

A concise 2-3 sentence summary of the month/quarter. What's the most important thing investors should know?

[Example: We hit \$100K MRR this month (+25% MoM), closed our first enterprise customer, and expanded the team with two senior engineers. Runway extended to 18 months with reduced burn.]

Ø=ÜÊ Key Metrics

\$[XX]K MRR +[XX]% MoM	[XXX] Active Users +[XX]% MoM	[XX] Customers +[XX] this month
\$[XX]K Cash in Bank [XX] months runway	\$[XX]K Monthly Burn [Down/Up] [XX]%	[XX]% Gross Margin

Ø<ß% Highlights & Wins

What went well this month? Celebrate your wins - both big and small.

- [Major win #1 - be specific with numbers and impact]

[Example: Closed \$250K ARR enterprise deal with Fortune 500 customer]

- [Product milestone or launch]

[Example: Shipped AI-powered analytics feature, already adopted by 40% of users]

- [Team achievement or hire]

[Example: Hired former Google PM as Head of Product]

- [Media, awards, or recognition]

[Example: Featured in TechCrunch, drove 5K+ signups]

- [Partnership or integration]

[Example: Signed partnership with Salesforce for marketplace listing]

Ø<ß Challenges & Learnings

Be transparent about what didn't go as planned and what you're learning. Investors appreciate honesty and want to help.

- [Challenge #1 and what you're doing about it]

[Example: Churn increased to 5% - investigating root causes, implementing health scoring system]

- [Operational or technical challenge]

[Example: Infrastructure costs spiked 30% - migrating to more cost-effective architecture]

- [Market or competitive challenge]

[Example: Competitor launched similar feature - differentiating with superior UX and integrations]

- [Key learning or pivot]

[Example: Realized SMB segment has 3x longer sales cycle than expected - shifting focus to mid-market]

Ø=Ü° Financial Update

Revenue:

- MRR: \$[XX]K (+[XX]% MoM, +[XX]% YoY)
- ARR: \$[XX]K (projected: \$[XX]K by year end)
- Average contract value: \$[XX]/month
- Net revenue retention: [XX]%

Expenses:

- Monthly burn: \$[XX]K ([Down/Up] [XX]% vs last month)
- Breakdown: [XX]% personnel, [XX]% infrastructure, [XX]% marketing, [XX]% other
- Key expense changes: [Note any significant changes]

Runway:

- Cash in bank: \$[XX]K
- Runway: [XX] months at current burn
- Projected runway with planned initiatives: [XX] months

Ø=Þ€ Product Updates

What shipped this month and what's coming next?

Shipped this month:

- [Feature #1 with adoption metrics]
- [Feature #2 with user feedback]
- [Bug fixes, performance improvements, technical debt]

Coming next month:

- [Planned feature #1 - why it matters]
- [Planned feature #2 - customer demand]
- [Technical improvements]

Ø=ÜÈ Growth & Marketing

- Website traffic: [XX]K visitors (+[XX]% MoM)
- Conversion rate: [XX]% (trial to paid)
- CAC: \$[XX] | LTV: \$[XX] | LTV:CAC = [XX]:[1]
- Top acquisition channels: [Channel 1], [Channel 2], [Channel 3]
- Content/campaigns: [What marketing initiatives ran this month]

Ø=Ü¼ Sales Pipeline

- New leads: [XX] ([Source breakdown])
- Qualified opportunities: [XX] worth \$[XX]K ARR
- Deals closed: [XX] worth \$[XX]K ARR
- Average sales cycle: [XX] days
- Win rate: [XX]%
- Key deals in progress: [Briefly mention notable opportunities]

Ø=Üe Team Updates

Current team size: [XX] people

- New hires: [Name/Role - why this hire matters]
- Open positions: [Roles you're actively hiring for]
- Team highlights: [Promotions, awards, accomplishments]

Culture & Morale: [Brief note on team health, engagement, any initiatives]

Ø<ß Strategic Initiatives

What are your top priorities and big bets for the next quarter?

1. [Initiative Name]

Goal: [What you're trying to achieve]
Status: [On track / At risk / Delayed]
Key metrics: [How you're measuring success]

2. [Initiative Name]

Goal: [What you're trying to achieve]
Status: [On track / At risk / Delayed]
Key metrics: [How you're measuring success]

3. [Initiative Name]

Goal: [What you're trying to achieve]
Status: [On track / At risk / Delayed]
Key metrics: [How you're measuring success]

Ø=ÐO How You Can Help

Be specific about what you need. Investors want to add value beyond capital.

- [Customer intro] - Do you know anyone at [Target Company]?
[Example: Looking for introductions to VP of Sales at Series B+ SaaS companies]
- [Talent] - Know anyone who might be interested in [Role]?
[Example: Seeking referrals for Senior Backend Engineer (Python/AWS)]
- [Expertise] - Need advice on [Specific topic]
[Example: Would love to learn from anyone who has experience with enterprise security compliance]
- [Partnership] - Connections to [Type of partner]
[Example: Looking for intros to integration partners in the payments space]
- [Press/Media] - Interested in sharing our story with [Type of publication]

Ø=Û Additional Resources

Links to dashboards, detailed metrics, or supporting materials:

- [Link to investor dashboard]
- [Link to product demo or walkthrough]
- [Link to detailed financial model]
- [Any press mentions or case studies]

Thank you for your continued support! Please don't hesitate to reach out if you have questions or want to dive deeper into anything.

[Founder Name]
[Email] | [Phone]

Best Practices: Send updates monthly or quarterly • Be honest and transparent • Include both wins and challenges • Make it easy to help you • Keep it concise (2-4 pages max)