**Investor Update Template**

(3-4 sentence intro to set the stage and tone but without repeating too many details provided below)

**Key Financial & Operational Metrics**

* MRR
* New Customers Added
* Customer Acquisition Cost
* Employees

**Highlights & Accomplishments**

* Xxxx
* Xxxx
* Xxx

**Issues & Challenges**

* Xxxx
* Xxxx
* Xxx

**Help Requested from Investors & Advisors**

* Xxx
* Xxx

-- -- -- -- -- -- -- -- -- -- -- -- -- -- -- -- -- -- -- -- --

The above information can be communicated in the body of an email or as a PDF attachment.

For the Results section, decide on 3-5 key metrics you’ll report on with each update. In addition to giving the result for the quarter (assuming these are quarterly updates), you’ll want to give some indication of growth from the previous period. You can add this in ( ). For example: “Revenue: $65K (45% growth over Q1)”.

I recommend no more than 5 bullets in each of the other sections, sticking to things you think investors will care about and at a level that’s not too detailed or in the weeds. I also recommend that you ask yourself “so what?” after reading each bullet point. In other words, you might have a bullet that says “Released the v2 beta of our product”. If you ask yourself “so what?” the answer might be “That’s significant because it add the XYZ feature, which opens up the enterprise market to us and should triple our average deal size” After doing this quick little exercise, you might instead write the bullet to include both the “what” and the answer to the “so what”.

If you’ve got any interesting trend graphs for either key financial or operational metrics, paste them at the bottom of the email or perhaps immediately below the Metrics section. This will give the investors additional insights into your business since trends tell a story visually.