



# Investor Update Template Pack

Powered by [OKRs Tool](#)

# Investor Update Template Pack

**Share updates that build trust, save time, and show traction.**

## 1. Monthly Investor Update Template

For sending consistent updates to your cap table with minimal effort and maximum clarity.

You can send this as an email or through your investor portal.

Subject line:

**[Company Name] Monthly Investor Update – [Month, Year]**

*Example: Orbit Update – July 2025*

Body:

### **1. TL;DR**

A short summary of key outcomes, challenges, and what's ahead.

“July was a strong month: MRR grew 14%, we shipped the new onboarding flow, and we’re preparing for our Seed+ raise in September.”

### **2. Metrics** *(Pick 3–5 depending on your business stage)*

- MRR: \$41,800 (+14%)
- Churn: 1.6%
- Active users: 2,418 (+7%)
- CAC: \$142
- Burn: \$38,000 | Runway: 12.2 months

### **3. Highlights**

Quick bullets covering product, team, and go-to-market.

#### **Product:**

- Onboarding redesign shipped to all users
- iOS app now in beta with 37 testers

#### **Growth:**

- Launched Product Hunt campaign (trending #2)

- Added 3 new mid-market customers
- Signed partnership with [company name]

**Team:**

- Hired Head of RevOps
- Onboarded 3 new engineers
- Open roles: PM, Senior Designer

#### **4. Challenges / Risks**

Transparency builds trust. Highlight key concerns.

- App store approval for iOS is delayed
- CAC is trending slightly above target
- Pipeline conversion slower than expected

#### **5. Asks / Help**

Don't forget to engage investors.

- Intro to GTM leads at [company]
- Referrals for B2B PR support
- Looking to connect with growth PMs in NYC

#### **6. What's Next**

What you're focused on for the coming month.

- Launch iOS app
- Improve activation by 15%
- Prep initial pitch materials for next round

#### **7. Gratitude (Optional)**

A human touch goes a long way.

"Appreciate all the help this month—especially intros and feedback on the new deck.  
Let's keep building 🚀"

## **2. Quarterly Board Report Structure**

For formal updates to board members or major investors—structured but not bloated.

## Slide / Section Breakdown:

### **1. Executive Summary**

- High-level overview of the quarter
- TL;DR of wins, misses, and changes to plan

### **2. KPIs and Metrics**

- Trailing 3–6 month view
- Charts for revenue, users, churn, CAC, etc.
- Include benchmarks or targets if relevant

### **3. Strategic Progress**

- Key results or OKRs
- Progress toward stated quarterly goals
- Areas of underperformance

### **4. Financials**

- Burn, runway, cash in bank
- Revenue vs plan
- Forecast and adjustments

### **5. Product & GTM Updates**

- Major launches or roadmap shifts
- Acquisition channels that are working
- Experiments and learnings

### **6. Team**

- New hires and open roles
- Key org changes
- Culture or retention notes

### **7. Risks + Mitigation**

- What's not working and what you're doing about it
- Honest, not defensive

## 8. Board Discussion Topics

- Open questions
- Strategic decisions
- Anything you need feedback or alignment on

## 3. Sample Formats for Early-Stage Teams

When you're just getting started, keep it even simpler.

### Option 1: 3-Line Update (for pre-seed/seed)

**What went well:**

"We shipped our V1 beta to 20 testers and signed our first pilot customer."

**What we're focused on:**

"Improving onboarding, shipping analytics, and preparing a PH launch."

**What we need:**

"Referrals for startup-friendly design help and intros to B2B founders using Segment."

### Option 2: Loom + Email

Some founders like to record a 2–3 min Loom and paste key bullets underneath.

**Subject:** Quick August Update – [Loom link]

**Key Numbers:**

- Waitlist: 820 → 1,160
- Emails opened from last campaign: 58%
- Product engagement: 9.4 sessions/user/week

**Shipping this week:**

- Billing setup
- Usage dashboard

- Team accounts

**Ask:** If you know any early-stage HR teams, we'd love to test with them!

## Guidance & Notes

- **Consistency > polish** — sending simple updates monthly is better than a perfect one quarterly.
- **Be honest** — investors value transparency over spin. If something's off-track, say so.
- **Don't forget the ask** — your investors are more useful when you ask for specific things.
- **Use formatting** — make updates easy to scan: bold headings, short sections, and bullets work best.

## Wrap-up

This template pack gives you a repeatable system you can build on as you scale. Use it monthly, quarterly, or to stay top-of-mind during a raise.

When in doubt, remember:

**A short, honest update > no update at all.**

## Try OKRs Tool — Turn Updates Into a System

Templates are great. A system is better.

With **OKRs Tool**, investor reporting becomes part of your workflow—not a last-minute scramble.

- Track weekly team updates in one place
- Auto-roll progress into board-ready reports
- Share updates via email, PDF, or link—in minutes

**Skip the spreadsheets. Share what matters.**

👉 [Try OKRs Tool Free →](#)

*No credit card required · Setup takes 5 minutes*