

To maintain investor confidence, your quarterly reports should be concise, data-driven, and transparent. High-performing startups that provide regular updates secure subsequent funding **2.5 times faster** than those that do not.

Use the following template to communicate your progress effectively.

Quarterly Investor Update Template

Subject: [Company Name] Q[#] [Year] Update — [1-Sentence Big Win]

TL;DR (Too Long; Didn't Read):

- **Revenue/Growth:** [e.g., Hit \$50k MRR, up 15% Quarter-over-Quarter].
- **Burn/Runway:** \$[Amount] monthly burn; [Number] months of runway remaining.
- **Top Priority:** [e.g., Launching Version 2.0 in October].

1. Key Performance Indicators (KPIs)

Ground your story in 2026's capital efficiency standards.

- **Growth:** [Monthly Recurring Revenue (MRR) or Total Revenue].
- **Unit Economics:** [LTV:CAC Ratio (Benchmark: >3:1)].
- **Efficiency:** [Burn Multiple or Payback Period (Benchmark: <12 months)].
- **Retention:** [Net Revenue Retention (NRR) or Churn Rate].

2. Financial Snapshot (The "Economics")

Investors need to know your "survival" metrics.

- **Cash in Bank:** \$[Current Balance].
- **Monthly Burn:** \$[Average monthly cash out].
- **Capital Stack Status:** [e.g., Fully compliant with SBA loan covenants via Esource; currently leveraging [X%] of our line of credit].

3. Highlights & Lowlights (The "Real Talk")

- **Highlights:** [e.g., Closed major partnership with X; improved conversion rate by 12%].
- **Lowlights:** [e.g., Delayed hire for Lead Engineer; churn increased in Segment B].
 - *Tip: Never surprise your investors. Disclosing problems early builds trust.*

4. Product & Team Updates

- **Product:** What did you build this quarter? What is the "so what" for the customer?.
- **Team:** Key hires or departures.

5. The "Ask" (How they can help)

Be specific and actionable.

- **Introductions:** "We are looking for intros to VPs of Sales at [Specific Industry] companies."
- **Hiring:** "Help us find a Senior DevOps Engineer."

Reporting Best Practices for 2026

- **Consistency is Key:** Use a repeatable format so investors can track trends over time, not just snapshots.
- **Contextualize Your Data:** Always compare your results to your original plan or budget (e.g., "We are 5% ahead of our Q3 revenue forecast").
- **Plain Text Preferred:** Most investors prefer a simple, searchable email over a heavy PDF or graphic-heavy deck.
- **SBA Compliance Note:** If you have an SBA loan, remember that you may have additional regulatory reporting requirements, such as submitting quarterly financial statements to your lender by the **45th day** after the quarter ends.