



INVESTOR NEWSLETTER TEMPLATE

Over the course of building and launching your product you will meet a number of people in different capacities, all of whom want to stay in touch. You can take the one off, contact each approach, which is great but also a heavy lift. Alternatively, you can create what's often referred to as an Investor Newsletter, which goes to friends, existing investors, prospective investors, and other potential partners who have interest in your growth and success.

Common in accelerators, the newsletter is sent weekly or monthly, and provides a view into the current state of your company, key milestones, and other newsworthy events. It's a great way to keep everyone up to date without the heavy lift of one to one outreach.

Below is a rough template that hits all the key points of an update – the biggest recommendation is to agree with what's important to share and then hold that format over time. People will become familiar with the structure and understand where to look for the key points of interest.

TEMPLATE STRUCTURE

- 1. Summary**
 - If they don't read anymore – what is the big thing you want them to know?
- 2. Greeting**
- 3. Company Overview**
 - Remind them what you do – name, value proposition, etc.
- 4. Highlights**
 - What's transpired since last time they heard from you?
- 5. Lowlights**
 - Not everything is always great. Be transparent in what you struggle with, someone on the distribution might be able to help.
- 6. Help Wanted/Asks**
 - If there are specific needs, call them out. Looking for a pilot? Be direct. Need someone to make an intro? Call it out – this is your chance to tap into your network!
- 7. Key Performance Indicators (KPIs)**
 - How are you doing against your goals? This is important for potential or existing funders, so choose your 3-5 key metrics and share consistently.
- 8. Product Development**
 - Summary of how things are going, what comes next, what is still needed.
- 9. Business Development**
 - Who are your big targets or prospects? How does the funnel look?
- 10. Staffing**
 - Any new adds? Departures?
- 11. Financing**
 - What's your burn rate, how is your runway, what is your capital plan?
- 12. Kudos**
 - Who deserves a special acknowledgment for their support?