

QUARTERLY INVESTOR UPDATE REPORT

Performance Update, KPI Trackers, and Strategic Outlook Template

1. Executive Summary

A summary of major achievements, financial health, strategic pivots, and product-market fit milestones over the past 90 days.

2. Key Traction & KPI Metrics

Detail current KPIs: Monthly Recurring Revenue (MRR), Annual Recurring Revenue (ARR), Net Revenue Retention (NRR), active users, and customer churn rate.

3. Product & Development Roadmap

Highlights of feature releases, platform scaling milestones, upcoming product lines, and design updates.

4. Financial Overview & Runway

Summary of current runway (months remaining), burn rate, cash reserves, and primary cost drivers.

5. Strategic Priorities & Asks

List areas where investors can help (e.g. introductions to talent, key enterprise partners, follow-on syndicates).