

Board/Investor Pack

What to include for credibility and clarity.

A well-prepared board or investor pack strengthens transparency, builds trust, and enables decision-makers to engage effectively. It should balance financial detail with strategic context, highlighting both achievements and challenges. Here's what to include.

1. Executive Summary

- Key highlights from the reporting period.
- Summary of performance vs. goals.
- Strategic priorities going forward.

2. Financial Performance

- Income statement, balance sheet, and cash flow summary.
- Key financial metrics: MRR/ARR, gross margin, CAC, LTV, runway.
- Variance analysis vs. budget/forecast.

3. Growth and Operations

- Customer acquisition and churn metrics.
- Sales pipeline and revenue projections.
- Operational KPIs (e.g., product usage, support volumes).

4. Strategic Initiatives

- Progress on major projects or product launches.
- Market expansion, partnerships, or M&A; updates.
- Key risks and mitigation strategies.

5. People and Culture

- Headcount and hiring updates.
- Employee engagement or retention metrics.
- Leadership or organizational changes.

6. Outlook and Guidance

- Forward-looking financial guidance.
- Strategic priorities for the next period.
- Anticipated challenges and opportunities.

7. Appendices (Optional)

- Detailed financial schedules.
- Expanded KPI dashboards.
- Supporting research or market data.

Final Thoughts

An effective board/investor pack doesn't overwhelm with data—it delivers a clear, credible narrative backed by the right details. This ensures stakeholders are aligned, confident, and empowered to make informed decisions.