

# Board Deck Template

The investor-ready structure for Seed–Series B startups

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### How to use this template

Each section is one slide. Fill the blanks, delete the guidance, and you have an investor-ready pack. Want it built for you automatically — with AI narratives, read tracking, and one-click scheduling? Build it live at [imboard.ai](https://imboard.ai).

01

# Cover & Overview

Set the frame in one glance. Keep it to a single page — no fluff.

### WHAT TO INCLUDE

- Company name and logo
- Meeting date and quarter (e.g. Q3 2026)
- Board members and attendees present
- Confidentiality notice

**TIP** One page, one purpose: orient the reader before they turn a single slide.

### YOUR NOTES

COMPANY

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MEETING DATE / QUARTER

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ATTENDEES

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PREPARED BY

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02

# Executive Summary

*Your narrative in the CEO's voice — write it last, after everything else is compiled.*

## WHAT TO INCLUDE

- The headline: the single most important thing since last meeting
- 3–5 bullets — what went well, what didn't, what changed
- The decisions or input you need from the board (preview your asks)

**TIP** Directors skim this first and spend the most time here. Frame the story before they form their own.

## YOUR NOTES

### HEADLINE

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### WHAT WENT WELL

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### WHAT WE'RE WATCHING

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### WHAT WE NEED FROM YOU

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# Key Metrics

The dashboard directors scan for the health of the business.

## WHAT TO INCLUDE

- ARR / MRR and month-over-month growth rate
- Burn rate, cash runway (months), and headcount
- North-star product metric (activation, retention, usage)

**TIP** Show trends, not snapshots — 3 months minimum. Keep definitions identical every quarter.

## YOUR NOTES

ARR / MRR

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GROWTH RATE

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NET BURN / RUNWAY

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HEADCOUNT

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NORTH-STAR METRIC

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04

# Financial Summary

*The numbers, with the variance explained before they ask.*

### WHAT TO INCLUDE

- P&L summary and current cash position
- Budget vs actual with variance on the lines that moved
- Updated runway and any financing activity

**TIP** Investors care about variance. Explain big misses proactively — candor builds trust.

### YOUR NOTES

#### CASH POSITION

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#### REVENUE VS PLAN

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#### SPEND VS PLAN

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#### VARIANCE NOTES

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05

# Product & Roadmap

*Shipped vs planned, and where you're pointing next quarter.*

### WHAT TO INCLUDE

- Key milestones: shipped this period vs planned
- Next-quarter priorities and the bets behind them
- Notable delays and what you're doing about them

**TIP** Be honest about slips. Boards respect candor far more than a green-everywhere status.

### YOUR NOTES

#### SHIPPED THIS QUARTER

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#### NEXT-QUARTER PRIORITIES

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#### DELAYS & MITIGATIONS

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06

# Go-to-Market: Pipeline & Customers

*How the business is compounding — demand in, customers kept.*

### WHAT TO INCLUDE

- Pipeline: new logos, funnel stage movement, notable wins/losses
- Customer health: retention, churn, expansion, NPS
- CAC, payback, and channel performance

**TIP** Pair a win and a loss each quarter. The loss is where the board can actually help.

### YOUR NOTES

**NEW LOGOS / PIPELINE**

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**RETENTION & CHURN**

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**CAC / PAYBACK**

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**WINS & LOSSES**

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07

# Team & Hiring

*The org behind the numbers, and where the gaps are.*

### WHAT TO INCLUDE

- Key hires made and departures
- Open critical roles and time-to-fill
- Org / culture signals worth surfacing

**TIP** Name the one role that, unfilled, most limits next quarter — that’s an ask in disguise.

### YOUR NOTES

**KEY HIRES**

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**OPEN CRITICAL ROLES**

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**ORG / CULTURE NOTES**

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# Risks & Challenges

*The things that keep you up — and what you're doing about them.*

## WHAT TO INCLUDE

- Top 2–3 risks (market, execution, financial, competitive)
- Mitigation in flight for each
- Where you're uncertain and want a second opinion

**TIP** A blank risk slide reads as a blind spot. Surfacing risk early is what a board is for.

## YOUR NOTES

### TOP RISKS

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### MITIGATIONS

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### OPEN QUESTIONS FOR THE BOARD

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# Asks & Decisions

*The reason you have a board. Never end a deck without this.*

### WHAT TO INCLUDE

- Formal votes or approvals needed (with the recommendation)
- Specific introductions you're asking for
- Advice: 2–3 questions where you genuinely want input

**TIP** Be specific. "Intro to a VP Sales at a PLG company" beats "any hiring help."

### YOUR NOTES

#### DECISIONS / VOTES

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#### INTRODUCTIONS REQUESTED

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#### ADVICE SOUGHT

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# 10

# Appendix

*The backup — detailed data for the directors who go deep.*

## WHAT TO INCLUDE

- Full financial statements (P&L, cash flow, balance sheet)
- Detailed KPI dashboards and cohort data
- Supporting material referenced above

**TIP** Keep the core deck tight; move the detail here. An 8-page pack beats a chaotic 30-page one.

## YOUR NOTES

### DETAILED FINANCIALS

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### COHORT / KPI DETAIL

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### SUPPORTING DOCS

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