

CUSTOMIZABLE BOARD DECK TEMPLATES

BUILT SPECIFICALLY FOR
SEED-STAGE STARTUPS





HOW TO USE THIS RESOURCE

SAVE TIME, COMMUNICATE BETTER, GET MORE DONE WITH YOUR BOARD.

The Use Case: Seed-Stage Board Meetings

These are intended for use at the seed stage, when there's little data, few or no design resources, and no history with your board directors.

The Goal: Stepping Up Your Board Game

Even at the seed stage, we believe it's important to establish a board cadence. In doing so, you operate more professionally and strategically, you prepare for later stages when boards are required, and you get more from seed investors who can help you and champion your cause.



HOW TO USE THIS RESOURCE

The Options: Multiple Ways to Communicate

In some cases, we've included multiple ways to present the same information. These are clearly marked with icons like these:



The Commentary: Pointers from the Partners

As needed, we've included some comments from the NextView team. Look for the icons like this:



(Not available on
PDF version.)



BEFORE, DURING, & AFTER

BEFORE THE MEETING

SEND YOUR DECK IN ADVANCE

The 75% or more of your actual meeting should be about discussion and solving problems – not merely updating investors. Send your deck a couple days in advance so all directors can see the data and get initial context. This lets you dive into a more productive discussion, following a brief section of housekeeping and recapping the slides during the meeting.

Additionally, design should be professional, but don't agonize over beauty. Send as a PDF to preserve your fonts and layout.

DURING THE MEETING

FOCUS ON 2-3 MAJOR ISSUES

At first, immediately following your seed fundraiser, most discussion will be about product direction and key hires. There may also be some early Series A commentary (which won't be revisited until before your next fundraiser process.)

Other major topics to discuss:

- Go-to-market plans/tests
- Product/market fit data
- Setting/reviewing milestones
- Asking for/receiving help

AFTER THE MEETING

WHAT ARE THE ACTION ITEMS?

Good board directors don't merely hear your updates, poke and prod, then go about their days. They should be used to remove barriers, make intros, suggest solutions, and meet 1:1 where specific expertise or deeper discussion can be useful.

Ensure everyone knows what they're responsible for delivering and when.

Additionally, if you're entering your first board meeting, be sure you come away with a set cadence for the first 6-9 months of board meetings.

TEMPLATE 1 of 2

FULL SLIDE DECK

FOR BOARD MEETINGS HELD
SHORTLY AFTER SEED FUNDRAISING





BOARD MEETING
MM.DD.YY

BRAND COLOR BAR

Agenda



1. Housekeeping
2. Progress Update
3. Financials
4. Team Update
5. Current Priorities
6. Key Concerns



EXAMPLE HOUSEKEEPING

Any or all of these can appear in your Board Updates slides. These are important and recurring items, but they shouldn't take up more than the first 30-60 minutes of the meeting.

- **Hiring**
 - Current org chart, with openings and requests for help
- **Office & Logistics**
 - Potential moves and cost (rent, \$ per sq. ft., lease length)
 - Insurance, healthcare, legal & other service providers
- **Approval of Meeting Minutes (if in use)**
- **Financials:**
 - Cash out date and burn rate
 - 409A valuation
 - Cap tables
 - Common/preferred stock dashboard

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Housekeeping

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Housekeeping – General



1. Item

- Context if needed

2. Item

- Context if needed

3. Item

- Context if needed

1. Meeting Minutes

- Do we approve?

2. Signed Office Lease

- \$X per sq. ft.
- Y desks
- Help Wanted: N desks available to rent

3. Graphic Designers

- Designing logo/brand ID
- Intros Wanted



Illustrative Only – REMOVE THIS

Progress Update

BRAND COLOR BAR

Progress Update



Highlights:

1. Update
 - Context
2. Update
 - Context
3. Update
 - Context

Lowlights:

1. Update
 - Context
2. Update
 - Context
3. Update
 - Context

Financials

BRAND COLOR BAR

Financials – Stock Option Grants



1. New Hire: (Name, Role)
 - X shares = Y%
2. Current Employee: (Name, Role)
 - X shares = Y%
 - Rationale (e.g. “Founding team member”)

Financials – Dashboard



	(Month)	(Month)
Revenue	\$N	\$N
Operating Expense	\$N	\$N
Net Income	\$N	\$N
Cash Burn	\$N	\$N

Cash Balance: \$N

Cash Out Date: MM/YY

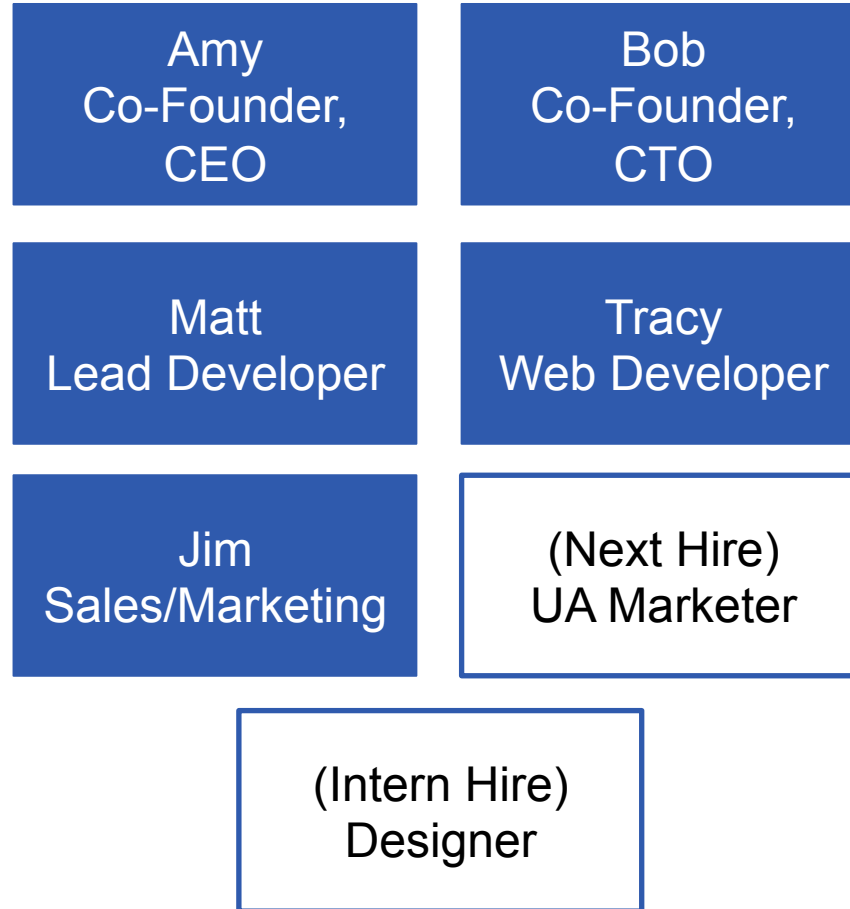
Notable in (Month):

- e.g. “Increase in payroll, rent, legal fees”
- e.g. “Decrease in marketing spend: events, paid Facebook”

Team Update

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Team Update



Team Compensation



Name	Role	Base Salary	Equity	Share Count	Start Date
Amy	CEO	\$N	\$X%	X	M/D/Y
Bob	Head of Product	\$N	\$X%	X	M/D/Y
Matt	Lead Developer	\$N	\$X%	X	M/D/Y
Tracy	Web Developer	\$N	\$X%	X	M/D/Y
Jim	Sales/ Marketing	\$N	\$X%	X	M/D/Y
TBD Hire	UA Marketer	To approve: \$N	To approve: \$X%	X	M/D/Y
TBD Intern	Designer	\$N	(small to none)	X	M/D/Y

Current Priorities

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A NOTE ON CURRENT PRIORITIES

Your progress updates will be the most customized to your business. Rather than propose one generic layout, we're showing three directionally correct layouts, each for a specific scenario:

1. A pre-launch startup.
 2. A post-launch, pre-revenue consumer mobile startup.
 3. An early-revenue SaaS startup.
- These slides might be mainly text, mainly graphs, or a combination.
 - They also might be broken up across multiple slides.

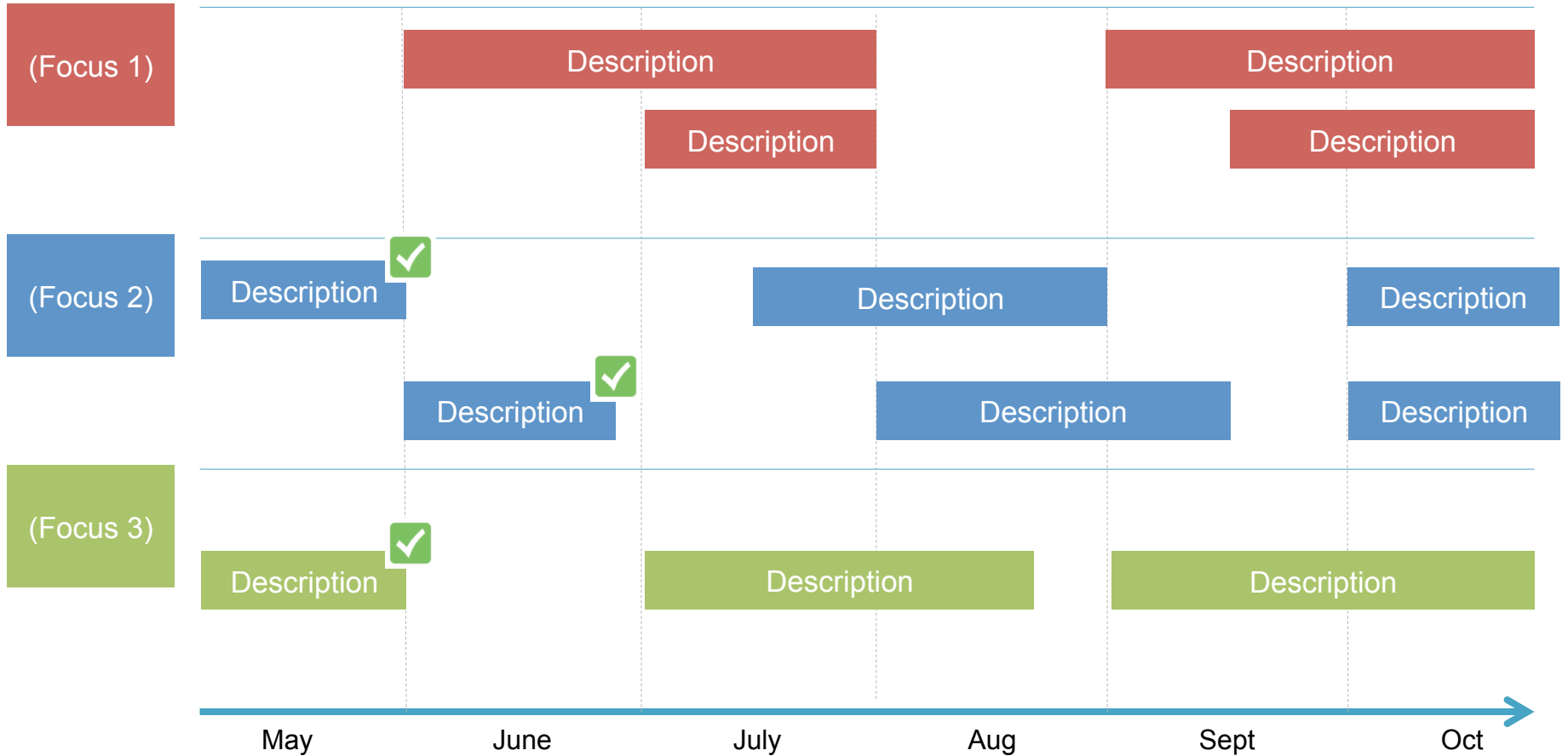
The Following Slides Are
Illustrative Only

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PRE-LAUNCH EXAMPLE

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Product Roadmap



- To demo at the meeting: X update, Y update, Z update
- In design/dev now: A update, B update, C update

User Personas



Likely Target Customers:



- “Busy Betty”
- Female (30s/40s), driven professional, values her time
- Uses many apps to save time
- Passive on social; active on blogs (lifestyle/hacks, business)



- “Digital Dana”
- Female & male (20s), young professional, time-waster
- Serial app adopter/dropper (mostly entertainment)
- Hyperactive on social media



- “Casual Cara”
- Female (30s/40s), primary driver is family, not career
- Makes time for leisure (reading, watching, listening, apps, etc.)
- Very active on Facebook only

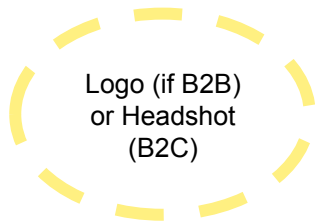
Tests Planned (Next 3 Months)

1. Offline/Local (events + flyers) – non-scalable tactics to acquire first cohort & learn
2. Facebook + Instagram – multivariate testing of messaging + audience targeting
3. Lifestyle Blogger Outreach – built target list of 100 (5 in draft now; 3 published)
4. Google AdWords – targeting longtail keywords on specific brands, trends
5. Paid content placement – targeting lifestyle/fashion sites → blog post housed on optimized landing page

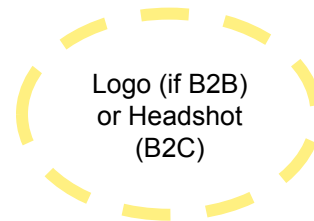
User Testing



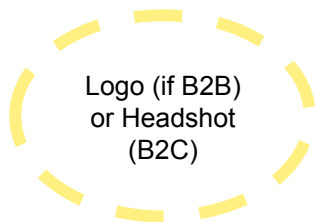
- Surveyed X User Prospects
 - (How we found them)
 - (What we hoped to learn)
- Key Insights:



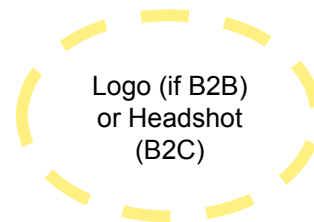
(Revealing Quote)



(Revealing Quote)



(Revealing Quote)



(Revealing Quote)

Takeaways & Action Items



- We thought we were selling to X customer but now believe Y is a better target
 - (How you plan to prove/disprove this thesis)
- Prioritizing X feature higher on product roadmap
 - (Why?)
- Passionate responses to X, not Y
 - (Early hypotheses as to why)
- X moved in the market which changes Y
 - (What was it? e.g. Facebook just launched XYZ)

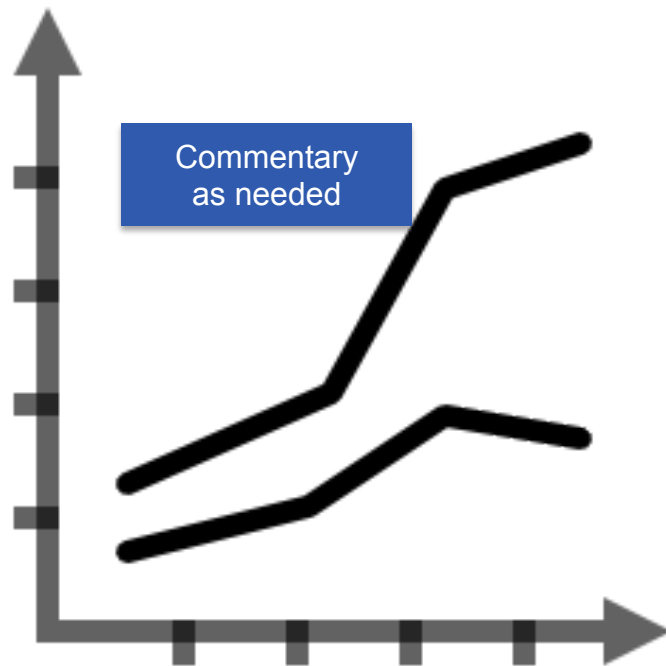
POST-LAUNCH/PRE-REVENUE
CONSUMER MOBILE EXAMPLE

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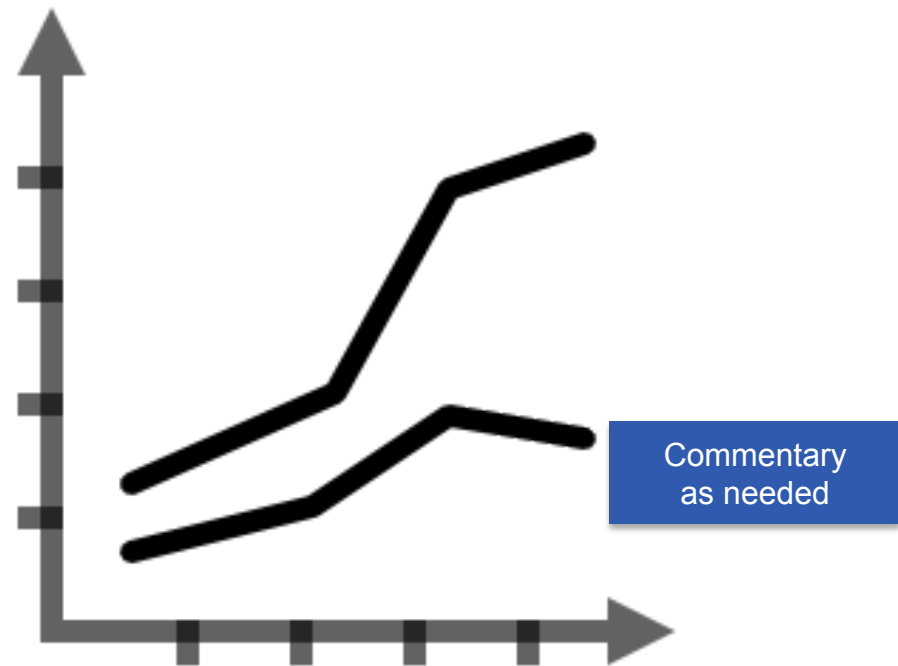
Growth



(KPI 1)



(KPI 2)



- Brief summary of what this data means and what resulting actions you'll take. (Discuss in the meeting if needed.)

Engagement



(List important top-of-funnel action)

Q2: 10.6%
Q1: 10.1%

← Flat Q2Q & below target.
Growing is Priority #1.

(middle-of-funnel action)

Q2: 23.2%
Q1: 15.1%

← Higher than anticipated

(middle-of-funnel action)

Q2: 3.3%
Q1: 3.9%

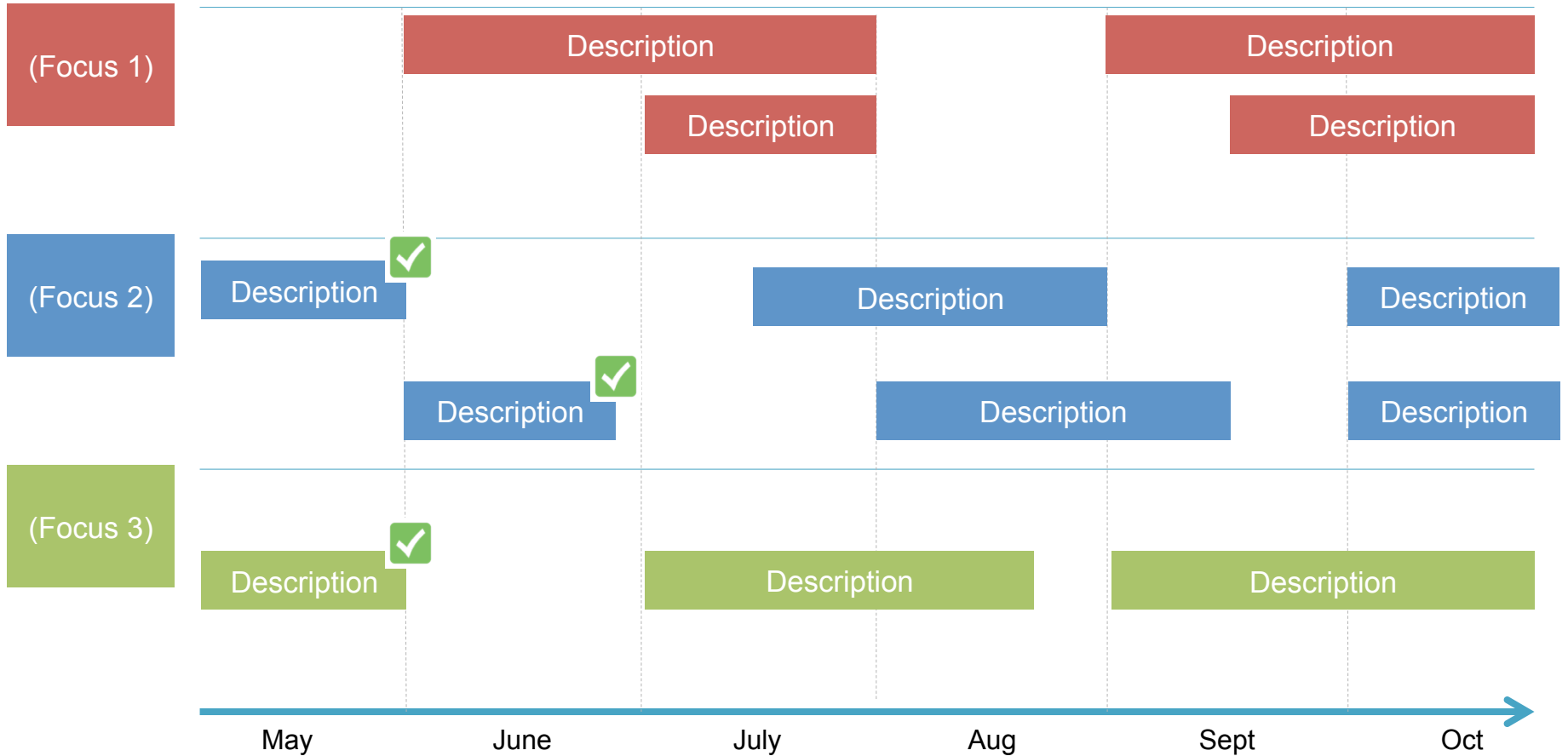
← Watching carefully but growing
Priority #1 takes precedent today.

(bottom-of-funnel
action)

Q2: 8.2%
Q1: 4.0%

← Doubled Q2Q after X product
update, discussed last meeting.

Product Roadmap



- To demo at the meeting: X update, Y update, Z update
- In design/dev now: A update, B update, C update

Takeaways & Action Items



- **X channel is doing great; forward invest in it**
 - (Or, “Best channel starting to fail. Why? What do we test next?”)
- **Engagement changed significantly (+ or –)**
 - (Why? What does it mean)
- **Product roadmap changes**
 - (What updates/shuffling will happen based on previous slides?)
- **Broader Discussion: Are things working?**
 - (What does board see elsewhere? Benchmarks?)

EARLY REVENUE SaaS EXAMPLE

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KPI Dashboard



Going Well/Advantages:

1. Top-line growth: **\$300K Q1** (record quarter)
2. Retention: **0.5%** churn
3. CAC: Improved to **\$X**
4. ASP: **\$X**
5. Early sales process implemented + strong initial results
6. Product NPS of **85**
7. New features (X & Y): strong qual. feedback + early adoption

Concerns/Risks:

1. Biggest acquisition channel (XYZ) slowing
2. Top-of-funnel marketing (site traffic down **15%**; net new leads down **25%**)
3. Sales/marketing alignment
4. When to hire for customer success

Sales Discussion



QTD Sales Results

- (Trend of note; e.g. X new deals / \$N new \$ACV from Y channel)
- (Trend of note; e.g. X customers from Y specific industry)
- Total: \$300K total bookings in Q1 – 105% of goal

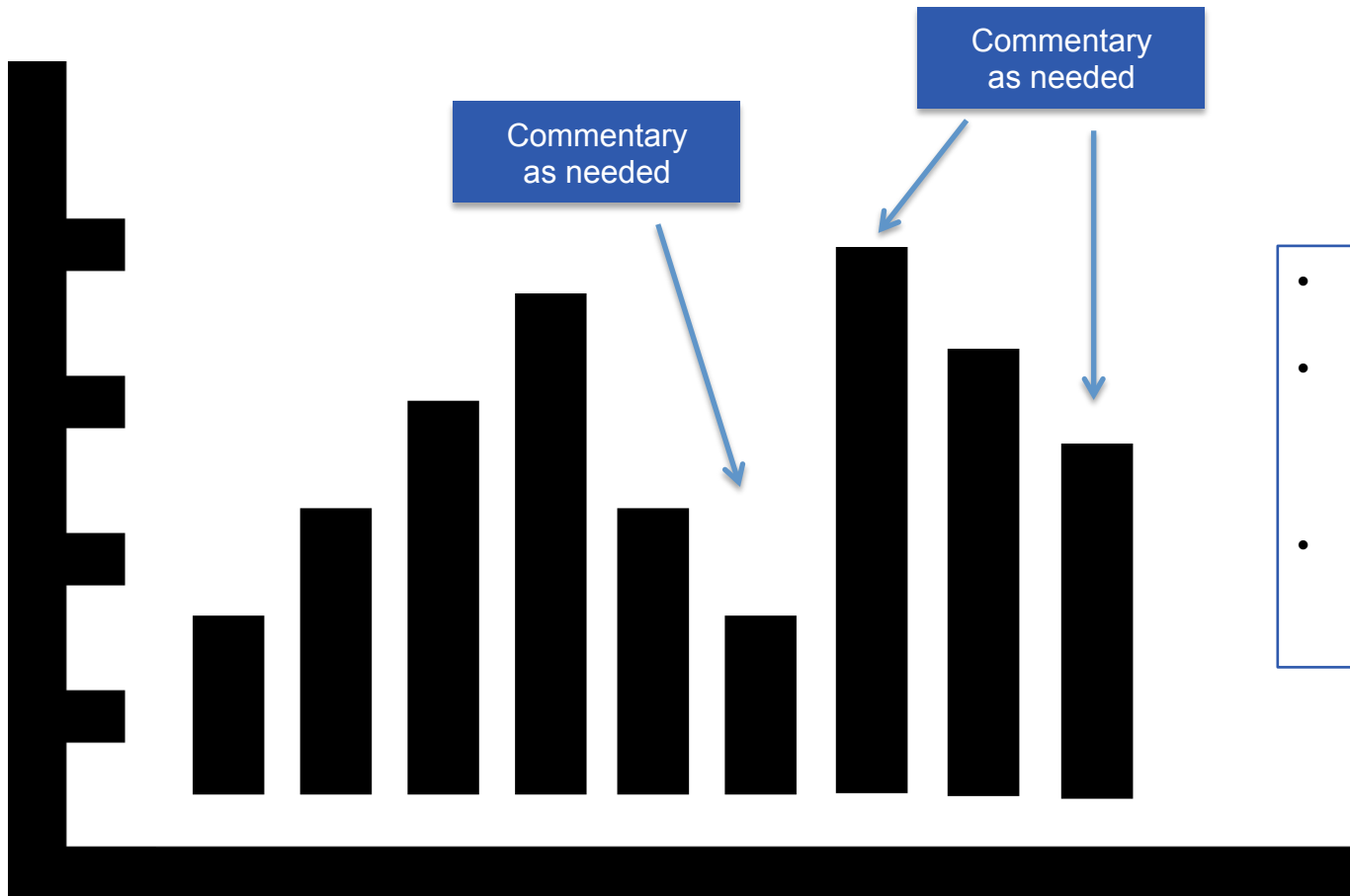
Pipeline

- (Trend of note; e.g. net new lead flow down QoQ)
- (Trend of note; e.g. total MQLs / opportunities strong despite lead flow)
- Focus is

Org Updates

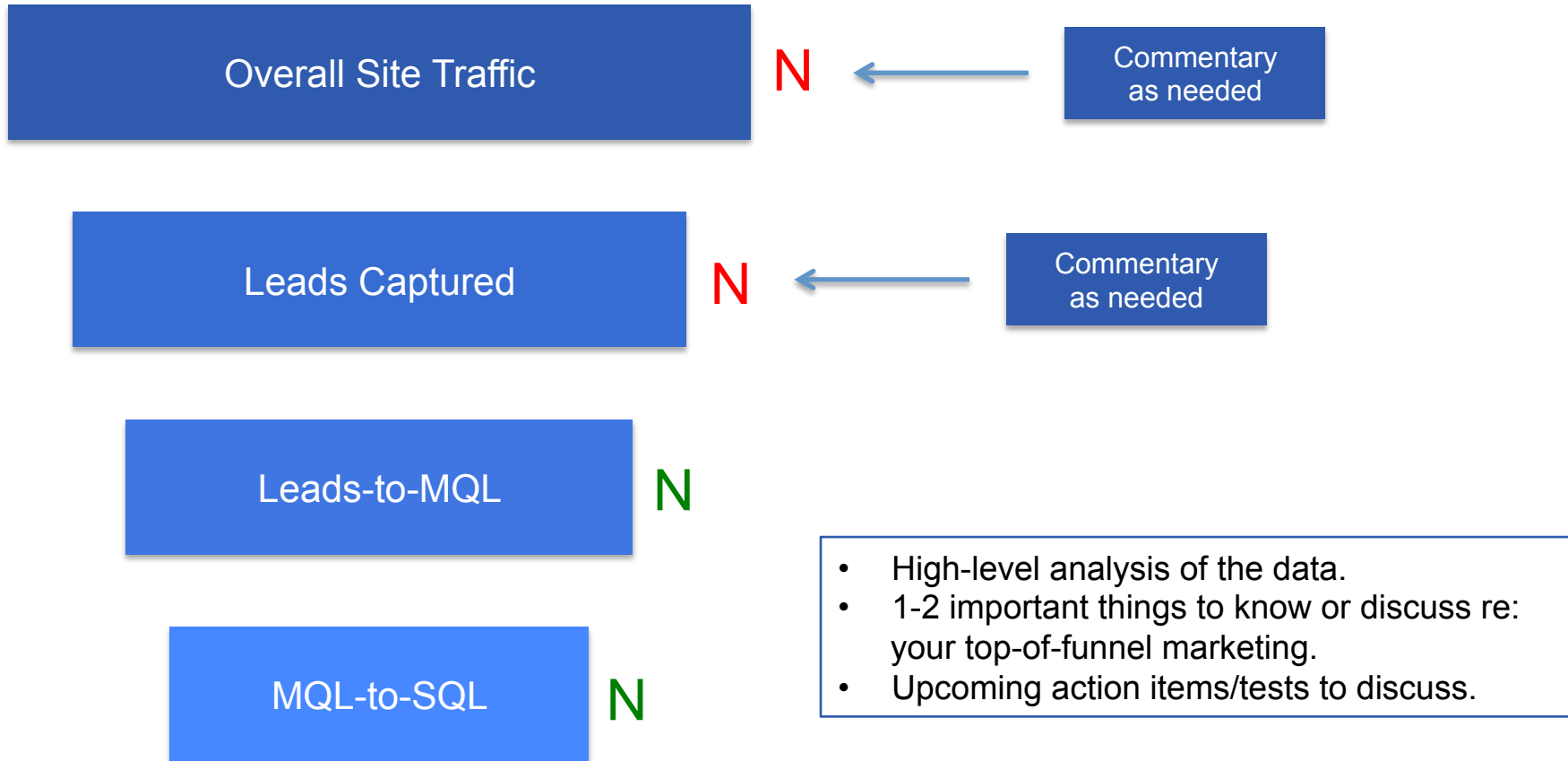
- (New hires, promotions, quota changes, process changes, etc.)

Sales Opportunities



- High-level analysis of the data.
- 1-2 important things to know or discuss re: your creation of sales opportunities.
- Upcoming action items/tests to discuss.

Marketing Funnel



Growth Machine



Marketing

- Update / Win / Concern
- Update / Win / Concern
- Update / Win / Concern

Sales

- Update / Win / Concern
- Update / Win / Concern
- Update / Win / Concern

Product

- Update / Win / Concern
- Update / Win / Concern
- Update / Win / Concern

Product Performance



NPS

N

Account Activation

N% register → usage

Usage

7 Day: N%

30 Day: N%

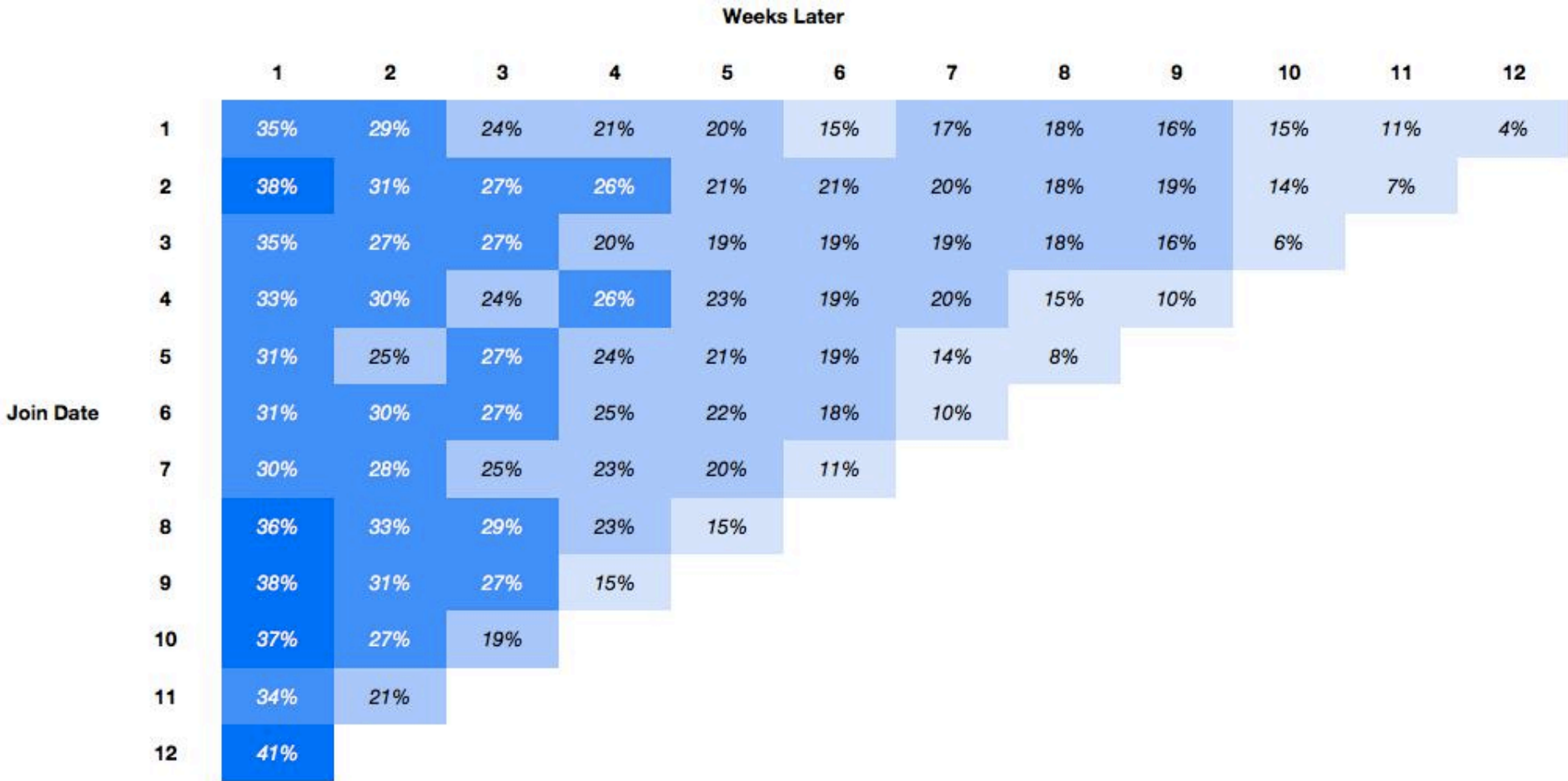
Feature Pipeline

- Recently Implemented: X, Y, Z
- 4-6 Months: X, Y, Z
- 6+ Months: X, Y

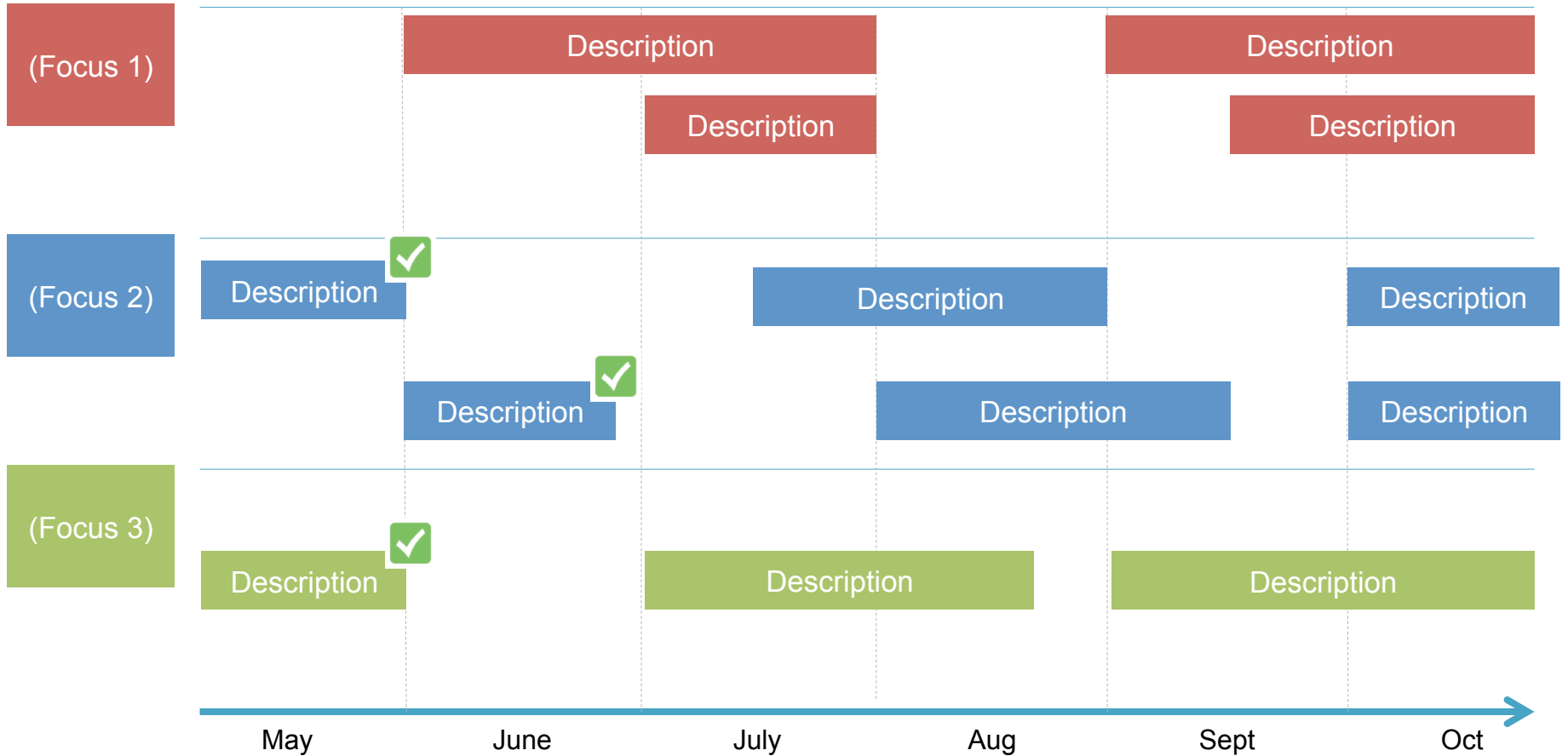
“Key quote as qualitative data point.”

-- Customer, Business

Early Cohort Analysis



Product Roadmap



- To demo at the meeting: X update, Y update, Z update
- In design/dev now: A update, B update, C update

Key Concerns

BRAND COLOR BAR

Key Concerns & Help Wanted



1. Concern/request #1
2. Concern/request #2
3. Concern/request #3

TEMPLATE 2 of 2

Running Update Doc

FOR BOARD UPDATES
AFTER SEED FUNDRAISING

*Read Rob Go's
explainer post about
this board doc style:
bit.ly/rob-doc*



HOW TO USE THIS VERSION

Some founders opt not to send slides to their seed investors.

And in fact, some investors prefer this approach.

Instead of a full deck, you might compile a running log of important updates, with a summary at the top. In some cases, your board may also like to annotate different sections before the meeting and flag various topics to discuss or clarify further.

Imagine the next few slides were one scrolling doc.

(Microsoft Word, Google Doc, etc.)

Also, note that multiple board meetings can be contained in the same doc, with the most recent placed at the top.

REMOVE THIS SLIDE

(Company Name) Board Meeting MM.DD.YY.

High Level Summary

Option 1 (delete this)

Summarize some of the major progress made and/or challenges uncovered. Include both positives and negatives for a more productive board conversation – especially critical in the seed stage.

- *You should also include 3-5 important bullets for certain critical updates and data points.*

Option 2 (delete this)

Highlights & Big Wins

- *List a few major accomplishments and/or data points showing positive traction.*

Challenges & Setbacks

- *List a few disappointments or difficulties. Plan to discuss these candidly, ask for help, and review strategies for overcoming these together with your board.*

Housekeeping

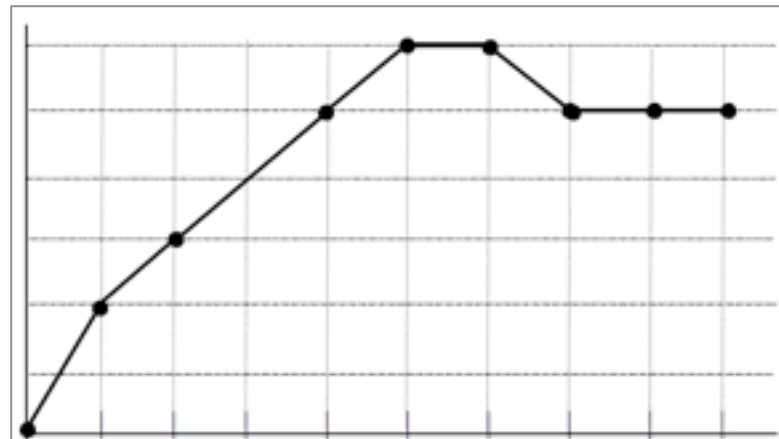
(Refer to previous section on housekeeping for ideas of what should be included.)

- Item 1: context
- Item 2: context
- Item 3: context

Core Metrics

Metric Name *(e.g. Monthly Active Users)*

Explain the data in a few short sentences above a screen shot of relevant charts, graphs, or tables.



(Include 3-5 similar sections – one per metric – depending on the specifics of your business, your goals, and your current KPIs.)

Product Roadmap

1. Milestone #1
 1. Context if needed
2. Milestone #2
 1. Context if needed
3. Milestone #3
 1. Context if needed

Hiring

- Recent hires: *(job functions)*
- New openings: *(job functions)*
- Recent departures: *(if any)*

Current Priorities/Discussion

1. Major Issue #1: *(Include a few sentences to describe it.)*
2. Major Issue #1: *(Include a few sentences to describe it.)*
3. Major Issue #1: *(Include a few sentences to describe it.)*

Burn, Budget, and Runway

Option 1 (delete this)

[Link to a Google spreadsheet you use to track finances.](#)

(This section will be a recurring item in each board meeting, so linking to a shared spreadsheet is an easy way to provide this information. In most cases, this will be an FYI more than a discussion point.)

Option 2 (delete this)

Cash: \$N

Burn Rate: \$N

Runway: X-Y months (worst case, assuming no revenue contribution)

Key Concerns/Help Wanted

- Item #1
- Item #2
- Item #3

(Last Board Meeting Starts Here)

MM.DD.YY.

GET WEEKLY INSIGHTS FOR SEED-STAGE STARTUPS

As seed VCs, we publish regular articles, templates, guides, and podcasts specifically focused on helping startups gain initial traction.

EXPLORE MORE:
NextViewVC.com/platform

