

Board meeting

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Board meetings don't have to be focused on the deck. What's important is that you're able to communicate the information effectively to the board while maximizing the value you get as a founder. This template is sourced from Sequoia Capital.

BIG PICTURE (15 MINUTES)

CEO Update

Summary:

Next Steps:

Highlights since last meeting

Summary:

Next Steps:

Lowlights/challenges since last meeting

Summary:

Next Steps:

Where the company needs help (i.e. hiring, partnerships, product, etc)

Summary:

Next Steps:

CALIBRATION (45-60 MINUTES)

Financial performance and updated forecast (quarterly)

Summary:

Next Steps:

Marketing performance vs. targets

Summary:

Next Steps:

Revenue/sales performance vs. targets

Summary:

Next Steps:

- Product engagement metrics (signups, downloads, activations, engagement, retention)**

Summary:

Next Steps:

- Product delivery and upcoming launches**

Summary:

Next Steps:

- Quality of customer experience (NPS but with added context)**

Summary:

Next Steps:

COMPANY BUILDING (30 MINTUES)

- Forward-looking org chat (current team + positions to fill)**

Summary:

Next Steps:

- Product roadmap (a view on where the company is heading)**

Summary:

Next Steps:

- Engineering and technical update**

Summary:

Next Steps:

- Growth team update**

Summary:

Next Steps:

- Corporate marketing update**

Summary:

Next Steps:

- Business development (list out 10 needle-moving partners and progress on each)**

Summary:

Next Steps:

- Operations (if relevant)**

Summary:

Next Steps:

- Monthly waterfalls for revenue, burn, cash balance, headcount

Summary:

Next Steps:

WORKING SESSION (1 HOUR)

- Topic 1 (I.e. Deep dive into a functional area, large partnership opp, or business challenge, etc)
- 30 minutes

Summary:

Next Steps:

- Topic 2 (I.e. Deep dive on quarterly company goals, product challenges, etc)

Summary:

Next Steps:

CLOSING REMARKS (15 MINUTES)

- Feedback for founders, formalities, stock option grants, etc

Summary:

Next Steps:
