

Investor Conversation Tracker

Pairs with: Investor conversations are not customer validation

Separate investor feedback from customer evidence.

Founder / team	Account / market / topic	Date
-----------------------	---------------------------------	-------------

When to use it

Use during fundraising to keep sales activity and market evidence separate from investor opinion.

What this worksheet covers

Investor question	Evidence requested
Pattern across meetings	Customer relevance
Action	Follow-up

Questions to answer before you start

<p>What questions repeat across investors?</p> <hr/> <hr/> <hr/>	<p>Which proof requests are also relevant to customers?</p> <hr/> <hr/> <hr/>
<p>What feedback should not change the business yet?</p> <hr/> <hr/> <hr/>	<p>What evidence will you show next time?</p> <hr/> <hr/> <hr/>

Investor feedback log

Investor question	Evidence requested	Pattern?	Customer relevance	Action	Follow-up date
Question 1	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Question 2	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Question 3	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Question 4	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Question 5	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Question 6	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____

Customer evidence comparison

Investor theme	Customer evidence available	Gap	Action
Demand	_____ _____	_____ _____	_____ _____
Pricing	_____ _____	_____ _____	_____ _____
Sales cycle	_____ _____	_____ _____	_____ _____
Retention	_____ _____	_____ _____	_____ _____
Margin	_____ _____	_____ _____	_____ _____
Risk/compliance	_____ _____	_____ _____	_____ _____
Market size	_____ _____	_____ _____	_____ _____

Risks, gaps, and evidence needed

Risk or gap	Why it matters	Evidence or action needed	Owner/date
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review
