INVESTOR TRACKER

Track every investor conversation, its stage and the next step, so no opportunity slips through.

TYPE: WORKSHEET REVIEWED: NOVEMBER 2026 TIME: 10 MINUTES TO SET UP LEVEL: BEGINNER

AT A GLANCE

- Raising money means **many conversations** over weeks or months. A tracker keeps them organized.
- Page 2 is a **fillable tracker** for up to 15 investors, with a running total of money committed.
- Update it **after every conversation**, and set the next step before you hang up.

Why it matters

Most investors say "not yet" before they say yes, and many decisions need several follow-ups. Founders who track every conversation follow up on time, remember what each investor cares about, and know exactly how close they are to their goal.

Stages to use

Stage	What it means
1 Target	On your list, not yet contacted
2 Intro	Introduced or first message sent
3 Meeting	First meeting held
4 Diligence	Reviewing your data room, asking questions
5 Terms	Discussing or reviewing terms
6 Committed	Verbally or in writing committed to invest
7 Closed	Money received
Passed	Said no for now. Keep them on your update list.

How to use it

1. **List 15 to 30 investors** who fit your stage, industry and size. See **R-10 Angel Investors**.
2. **Note how you'll reach each one,** ideally a warm introduction.

3. **After every contact,** update the stage, the date, and the next step with a date.
4. **Enter amounts** once an investor commits. The tracker totals them.
5. **Review weekly.** Follow up on anything overdue.

> TIP
>
> Need to track more than 15? Save a copy for each group of 15, or move to a spreadsheet using the same columns.

> TIP
>
> Calculations work in **Adobe Acrobat Reader** (free) and most desktop PDF apps.

Where to go next

- **R-10 Angel Investors**
- **R-19 Telling Your Story: The Pitch**
- **R-22 Investor Updates: Keeping Investors in the Loop**

IMPORTANT
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Stages: 1 Target, 2 Intro, 3 Meeting, 4 Diligence, 5 Terms, 6 Committed, 7 Closed, or Passed.

	Investor	Firm or type	How we connect	Stage	Last contact	Next step	Next date	Committed ($)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
Total								

Raise goal	
Still needed	

Fill in the white boxes. Shaded boxes calculate automatically.