Claude Skills for Investor Data Rooms

Cheat sheet: 36 Claude skills to build a data room that survives due diligence. Start with **00-plan-your-data-room-route**.

The 7 stages

1 · Set up the room
- 01 Plan the data room
- 02 Folders and file names
- 03 Access tiers and NDA gate
- 04 Document index

2 · Company and legal record
- 05 Reconcile the cap table
- 06 Formation and good standing
- 07 Governance records
- 08 Actions → board approvals
- 09 IP ownership
- 10 People and contractor paperwork
- 11 Material contracts and disputes

3 · Financials
- 12 Tie out historical financials
- 13 Revenue bridge
- 14 Burn and runway
- 15 Review the forecast model
- 16 Use of funds → milestones
- 17 Tax filings and exposure

4 · Customers and market
- 18 Customer concentration
- 19 Customer contracts
- 20 Pipeline vs. signed
- 21 Market evidence
- 22 Go-to-market proof

5 · Product, tech and data
- 23 Shipped vs. roadmap
- 24 Technical architecture
- 25 Security evidence
- 26 Data and privacy
- 27 Your AI systems

6 · Review and open the room
- 28 Source index
- 29 Cross-file checks
- 30 Red-flag review
- 31 Redact before you share
- 32 Final audit (go/no-go)

7 · During diligence
- 33 Answer the request list
- 34 Diligence Q&A log
- 35 Prep for the diligence call

Which skill do I need?

If you're thinking…	Use	If you're thinking…	Use
"What will investors expect to see?"	01	"Is this customer really a customer?"	20
"Who should see what, and when?"	03	"Can we prove this market number?"	21, 28
"Does our cap table add up?"	05	"What will investors flag?"	30
"Did the board approve all this?"	08	"Is it safe to share this file?"	31
"Do we actually own our code?"	09	"Are we ready to open the room?"	32
"Why don't our revenue numbers match?"	12, 13, 29	"They sent a 90-item request list."	33
"How long does our cash last?"	14	"Do the whole thing in the right order."	00

4 prompts to copy

> *"Use 00-plan-your-data-room-route. We're raising a $6M Series A and the lead wants the room in three weeks."*

> *"Use 05-reconcile-the-cap-table on these files: the cap table, the option ledger and both SAFEs."*

> *"Use 29-run-cross-file-checks on the deck, the model and the customer list. Don't pick a winner."*

> *"Use 33-answer-the-investor-request-list. Here's their checklist and our document index."*

Three access tiers

First look	Deck, summary financials, team. Before an NDA.
After the NDA	Cap table, contracts, detailed financials.
Confirmatory	Personal data, full customer list, code. Near closing.

Install and rules

1. **claude.ai:** turn on code execution, then **Customize** → **Skills** → **+** → **Upload a skill** with a zip from **zips**.
2. Never invents a document, signature or number. Gaps show as [needs data].
3. When files disagree, it keeps every value and names who decides.
4. Not legal, tax or accounting advice: it tells you what to ask.