



AcceleratorApp
Software for Accelerator & Incubators

2026 EDITION

The Incubator Management Guide

Tracking resident companies from intake to graduation

A practical field guide for managing long-form relationships, consistent check-ins, and outcome reporting across a full resident portfolio.

Incubation is a relationship business measured in years, not weeks.

An accelerator runs a sprint. An incubator runs a marathon. Your resident companies stay 12, 24, even 36 months. The relationship is deep, the history is long, and the biggest operational risk is that all of it lives in individual staff members' heads and inboxes.

This guide is about running a long-form program well: keeping institutional memory in the system, maintaining consistent check-ins at scale, and producing outcome reports without a quarterly archaeology project.

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WHAT THIS COVERS

Resident intake, building the resident timeline, check-in cadence, milestone tracking over months, advisor relationships, portfolio health, alumni, and outcome reporting. Each section is a working practice, not a feature list, with the checklist to put it in place.

HOW TO READ THIS GUIDE

Each section opens with the principle, then gives you the checklist to implement it. The sections build on one another: intake creates the profile, the profile becomes the timeline, the timeline feeds check-ins and milestones, and all of it rolls up into portfolio health and outcome reporting. Read it in order the first time, then keep it as a reference for the parts you are setting up.

Intake sets up everything that follows for the next two years.

The work you do at intake is not paperwork. It is the foundation of a record that will grow for the entire time a company is in residence. Done well, no one re-enters anything and the first check-in is already on the calendar. Done poorly, every staff member rebuilds the picture from scratch.

THE INTAKE CHECKLIST

- ☐ Build an intake form scoped to long-form incubation, not a 12-week sprint
- ☐ Set eligibility criteria that match your program's stage and sector focus
- ☐ Score with a rubric that weighs potential over current traction
- ☐ On acceptance, create the resident profile from the intake data, no re-entry
- ☐ Set the initial milestone plan and first check-in date at onboarding

THE PROFILE IS THE POINT

Every resident should have a profile from day one that will accumulate their entire history. The intake data is the first entry in a record that grows for years. Treat the form less as a screening tool and more as the opening page of a two-year file.

WEIGH POTENTIAL OVER TRACTION

An accelerator can select on traction because it only has 12 weeks to show movement. An incubator is buying into a longer arc, so the rubric should reward the quality of the team, the size of the problem, and the realism of the plan more than this month's revenue. Write those weights into the scoring rubric so every reviewer applies the same lens.

Institutional memory should live in the system, not in your staff.

When a coordinator leaves, what happens to everything they knew about their resident companies? In most incubators, it leaves with them. The resident timeline solves this: a single chronological record per company that every staff member writes to and any staff member can read.

WHAT BELONGS ON EVERY RESIDENT TIMELINE

- ☐ Every check-in with structured notes
- ☐ Every mentor and advisor session
- ☐ Milestone submissions and approvals
- ☐ Documents, contracts, and agreements
- ☐ Status changes with dates and reasons
- ☐ KPI updates over time

THE HANDOVER TEST

A new coordinator should be able to open a resident profile and understand the full history without a briefing from the person who left. If they cannot, your institutional memory is at risk. Run this test deliberately: have someone unfamiliar with a company try to brief themselves from the timeline alone.

WHY CHRONOLOGY MATTERS

A folder of documents tells you what exists. A timeline tells you what happened and in what order: the pivot after a hard check-in, the advisor intro that unblocked a hire, the milestone slip that preceded a funding delay. That sequence is the institutional knowledge an incubator actually runs on, and it only survives if it is captured as it happens.

Consistent check-ins are the heartbeat of a healthy incubator. They are also the first thing to slip at scale.

Ten residents are easy to keep up with. Sixty require a system, or the thriving companies get ignored and the struggling ones surface too late. The goal is a cadence that runs whether or not any single staff member remembers to chase it.

THE CHECK-IN STRUCTURE

- ☐ Schedule recurring check-ins per resident through the platform
- ☐ Use structured note templates so every check-in captures the same data points
- ☐ Attach notes to the resident timeline automatically, no follow-up email
- ☐ Flag residents overdue for a check-in in your portfolio view
- ☐ Vary cadence by stage: more frequent early, lighter once established

TEMPLATES MAKE CHECK-INS COMPARABLE

When every check-in captures the same fields, you can see patterns across the portfolio and over time. Free-text notes in an inbox cannot do that. A structured template turns each conversation into data you can compare, not just a memory you hope someone wrote down.

CADENCE BY STAGE

A company in its first quarter needs frequent contact while it finds its footing. An established resident two years in needs a lighter touch and a faster way to flag when something changes. Set a default cadence per stage so the schedule adjusts as a company matures, rather than every resident getting the same calendar regardless of need.

Incubator milestones span the whole program, not the current quarter.

A 12-week program can plan milestones a sprint at a time. A two-year program cannot. The milestone plan has to hold up across the full residency, with real dates and evidence that proves progress rather than just asserting it.

DESIGNING MILESTONES FOR LONG-FORM PROGRAMS

- ☐ Define milestones across the full program length with real due dates
- ☐ Use different evidence types per milestone (report, metric, document, demo)
- ☐ Let residents submit evidence through their own portal
- ☐ Review and approve with a structured workflow
- ☐ Surface overdue milestones in the portfolio grid automatically

FLAG EARLY, INTERVENE EARLY

A milestone that has been pending for 30 days is a signal. A portfolio grid that surfaces it lets you have the support conversation before it becomes a failure conversation. The earlier the flag, the more options the company still has.

EVIDENCE, NOT ASSERTION

Different milestones call for different proof: a hiring milestone needs a document, a traction milestone needs a metric, a product milestone needs a demo. Letting residents submit the right evidence type through their own portal keeps the record honest and saves your team from chasing attachments by email after the fact.

Long-form advisor relationships need tracking that survives over time.

Over a two-year residency, an advisor relationship can be the difference between a company that stalls and one that compounds. But relationships decay quietly. Without tracking, you only notice an advisor has gone quiet when the resident mentions it months later.

MANAGING ADVISOR RELATIONSHIPS OVER MONTHS

- ☐ Build the advisor pool with expertise tags and capacity
- ☐ Assign advisors to specific residents
- ☐ Log every session with structured notes
- ☐ Surface relationships that have gone quiet for too long
- ☐ Track advisor load across the full portfolio

SILENCE IS A SIGNAL

An advisor relationship with no activity in six weeks is worth a check. The portfolio view should make that visible without you remembering to look. A quiet relationship is not always a problem, but it is always worth a question.

PROTECT YOUR ADVISORS' TIME

Your best advisors are your scarcest resource, and the easiest to burn out. Tracking expertise tags and capacity lets you match the right advisor to the right resident and spread the load evenly, rather than routing every hard problem to the same three people until they stop answering.

You should be able to answer "how is every resident doing" in under a minute.

THE PORTFOLIO HEALTH VIEW

- ☐ Days since last check-in per resident
- ☐ Milestone status per resident
- ☐ Advisor session recency
- ☐ A simple health indicator per company
- ☐ Filters to surface companies that need attention

RESIDENT	LAST CHECK-IN	MILESTONE	HEALTH
Northwind Labs	4 days ago	On track	● Healthy
Cobalt Systems	19 days ago	Pending 12d	● Watch
Meridian Bio	3 days ago	On track	● Healthy
Atlas Robotics	41 days ago	Overdue 30d	● Needs attention
Verdant Foods	9 days ago	On track	● Healthy

THE GRID REPLACES THE STAFF MEETING

A portfolio grid that shows every resident's status in one view answers the questions a weekly staff huddle is usually convened to answer. The meeting can then be spent on the two or three companies that actually need a decision, not on a round-the-room status recital.

Your program's case rests on what happens to companies after they graduate.

An incubator is judged on its alumni. The funding case, the next intake's applicant quality, and the board's confidence all trace back to what graduated companies went on to do, and whether you can show it.

ALUMNI AND OUTCOME TRACKING

- ☐ Move graduated companies to alumni status, keeping their full record
- ☐ Continue tracking post-graduation outcomes (funding, revenue, jobs, exits)
- ☐ Maintain an alumni community for peer connection and referrals
- ☐ Pull outcome data for funder and board reporting from the dashboard

OUTCOMES ARE THE FUNDRAISING STORY

When your funder asks what the program produced, the answer should be a dashboard, not a week of data reconstruction. The companies you graduated three years ago are the proof your program works, but only if their outcomes are still in the system.

KEEP THE RECORD, KEEP THE RELATIONSHIP

Moving a company to alumni status should preserve its full history, not archive it out of reach. Graduated founders refer the next cohort, mentor current residents, and report the funding rounds and exits that make your case. An alumni community keeps those relationships warm long after the residency ends.

Configure once. Reuse every intake cycle.

The first time you set up a program, you build everything: the intake form, the rubric, the milestone plan, the advisor rules. The mistake is rebuilding it for the next cycle. Everything you configured is reusable, and the point of a system is that you do it once.

WHAT TO SAVE AND REUSE

- ☐ Save the intake form, eligibility criteria, and scoring rubric
- ☐ Save the milestone template and check-in schedule
- ☐ Save the advisor matching rules and notification templates
- ☐ Clone the program configuration for the next intake

THE COMPOUNDING SETUP

The first cycle takes setup. Every cycle after starts from your saved configuration. Each intake then improves on the last instead of repeating it, and the time you used to spend rebuilding goes back into the residents.

CLONE, THEN REFINE

Cloning a program configuration does not lock you in. It gives you a working starting point that you adjust where the last cycle taught you something: a rubric weight that was off, a milestone that landed at the wrong time, a notification that fired too late. The setup compounds because you are editing, not starting over.

AcceleratorApp is a program management platform trusted by 200+ organizations across 6 continents, including Startup Braga, MIT Design X, Imagine H2O, and Max Planck Innovation.

It manages the full resident lifecycle in one connected system: intake, the resident timeline, check-in workflows, long-form milestone tracking, advisor management, community, AI application scoring, AI reporting, and outcome reporting.

HIGHLIGHTS

700,000+ applications processed

ISO 27001 certified

GDPR compliant

Live in 1 to 2 weeks

Full migration included

Plans from \$499 per month

GET STARTED

Book a demo: acceleratorapp.co/en/demo

See pricing: acceleratorapp.co/en/pricing

Contact: support@acceleratorapp.co

ONE CONNECTED SYSTEM

- Intake forms, eligibility, and scoring built for long-form programs
- A resident timeline that keeps institutional memory in the system
- Recurring check-ins with structured note templates
- Milestone tracking across the full residency
- Advisor management with capacity and recency tracking
- Portfolio health in a single grid view
- AI application scoring and AI reporting
- Alumni and outcome tracking for funder reporting

From intake to graduation and beyond, the resident record stays in one place, so no relationship, milestone, or outcome lives only in someone's inbox.



AcceleratorApp
Software for Accelerator & Incubators

Ready to put your resident portfolio in one place?

A 30-minute demo tailored to your program structure,
check-in cadence, and outcome reporting.

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