

Weekly Partner Progress Report — Template

Weekly Partner Progress Report

Sent to partners every Monday for active cases. Standardized format for all partner communications.

Report Header

Partner: [Partner Name / Company] **Report Period:** [Monday Date] — [Sunday Date] **Prepared by:** [WTP Account Manager] **Active Cases:** [Number]

Case Summary

#	CLIENT REF	PACKAGE	STAGE	STATUS	NEXT ACTION	ETA
1	[REF-001]	L2 Setup	Stage 6 — On-Ground	On track	Bank meeting Wed	[Date]
2	[REF-002]	L1 Entry	Stage 3 — Analysis	On track	Risk verdict pending	[Date]
3	[REF-003]	L0 Advisory	Stage 4 — Confirmation	Delayed	Awaiting SOF docs	[Date]

Detailed Updates

Case [REF-001] — [Client Initials]

Package: Level 2 — Setup **Current Stage:** Stage 6 — Client Arrival / On-Ground Execution **This week:**

- [Completed visa biometrics appointment]
- [Company registration documents submitted to [Free Zone / DED]]
- [Personal bank meeting at [Bank Name] — positive preliminary feedback]

Next week:

- [Corporate bank meeting scheduled for [Date]]
- [Trade license expected to be issued by [Date]]
- [Emirates ID collection]

Blockers / Risks:

- [None / Describe any issues]

Client satisfaction: [No concerns raised / Specific feedback]

Case [REF-002] — [Client Initials]

Package: Level 1 — Entry **Current Stage:** Stage 3 — Offline Analysis **This week:**

- [Documents received and review initiated]

- [Sanctions screening completed — clear]
- [SOF verification in progress]

Next week:

- [Risk verdict to be issued by [Date]]
- [Banking scenario recommendation to follow]

Blockers / Risks:

- [Missing: [specific document]. Requested from client on [Date]]

Financial Summary

CASE	PACKAGE VALUE	INVOICED	RECEIVED	OUTSTANDING
REF-001	\$25,000	\$12,500	\$12,500	\$12,500
REF-002	\$8,000	\$0	\$0	\$0
REF-003	\$2,000	\$2,000	\$2,000	\$0
Total	\$35,000	\$14,500	\$14,500	\$12,500

Partner Commission Tracker

CASE	DELIVERY MILESTONE	COMMISSION DUE	STATUS
REF-001	Bank account opened	\$2,500	Pending delivery
REF-002	Risk verdict issued	—	Pre-delivery
REF-003	Advisory delivered	\$200	Paid [Date]

Action Items

#	ACTION	OWNER	DUE
1	[Provide missing SOF document for REF-002]	Partner	[Date]
2	[Schedule corporate bank meeting for REF-001]	WTP	[Date]
3	[Send advisory report for REF-003]	WTP	[Date]

Notes

[Any additional context, market updates, or upcoming changes that affect active cases.]

Next report: [Next Monday Date] **Questions?** Reply to this email or reach out on Telegram: @wtp_uae

