

# 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
<b>Total</b>	<b>\$35,000</b>	<b>\$14,500</b>	<b>\$14,500</b>	<b>\$12,500</b>

## 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	DUET
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

