

VISIBILITY

Consultancy enquiry tracker

A sample register showing ownership, current status, next actions, due dates and approval boundaries.

4 Open enquiries

1 Call scheduled

1 Awaiting approval

1 Owner-only decision

ID / RECEIVED	PROSPECT	REQUEST	OWNER	STATUS	NEXT ACTION	DUE DATE	APPROVAL LEVEL
CD-001 8 Jun 2026	Example Prospect A	Strategy consultation	ClearDesk	Discovery scheduled	Send calendar reminder	11 Jun	Routine
CD-002 9 Jun 2026	Example Prospect B	Custom project proposal	Consultant	Awaiting decision	Approve non-standard scope	12 Jun	Client approval
CD-003 10 Jun 2026	Example Prospect C	Training enquiry	ClearDesk	Proposal sent	Complete first follow-up	15 Jun	Routine
CD-004 10 Jun 2026	Example Prospect D	Partnership request	Consultant	Escalated	Decide whether to proceed	12 Jun	Owner only

Routine: ClearDesk may proceed under agreed rules. **Client approval:** Work pauses for a documented decision. **Owner only:** ClearDesk records and escalates but does not act.