

WEEKLY OPERATIONS REPORT

Consultancy enquiries and proposal follow-up

A concise operational view of completed work, unresolved items, decisions and the capacity used during the reporting period.

REPORTING PERIOD	PREPARED FOR	WORKFLOW STATUS
8–12 June 2026	Example Consultancy	On track

10 Enquiries recorded	4 Discovery calls scheduled	6 Follow-ups completed
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Completed this week

- ✓ Logged and categorised ten incoming consultancy enquiries.
- ✓ Sent ten acknowledgements using the approved response template.
- ✓ Coordinated four discovery-call appointments and reminders.
- ✓ Prepared three proposal drafts from approved rates and scope information.
- ✓ Completed six scheduled proposal follow-ups.

Next-week priorities

- ✓ Issue three proposals after consultant approval.
- ✓ Complete second follow-up for two inactive prospects.
- ✓ Confirm the replacement discovery-call date.

Client decisions required

Non-standard pricing

Prospect A requested pricing outside the approved rate card.

Contractual exception

Prospect B requested a commitment outside ClearDesk authority.

Support usage

ACTIVITY	TIME
Enquiry handling	2h 10m
Scheduling	1h 05m
Proposal support	1h 25m
Reporting	0h 30m
Total	5h 10m

Example usage: 5h 10m of 8h allocated

Access and approval note

ClearDesk operates only within the agreed workflow, approved templates and documented permission levels. Pricing changes and contractual commitments remain with the client.