

Your Extra Pair of Hands in Business Support & Operations

Client Management & Progress Report

Select a report category and customize each section for the specific client.

Client and reporting details

Client company: _____

- GBO client reference: _____
- Reporting period: _____
- Report type: _____
- Prepared by / reviewed by: _____

Executive summary

- Main achievements, key changes and material matters requiring management attention.
- Overall delivery status: On track / At risk / Delayed / Complete.

Work performed and evidence

- Service or task | Assigned owner | Due date | Status | Evidence/reference | Client feedback.
- Document completed deliverables, pending clarifications, approvals and links to secure records.

Finance, compliance or operational measures

- Include only metrics relevant to the selected report: cash, collections, payables, reconciliation status, filings, payroll, risks, KPIs.
- Show source period, supporting documents, amounts in KES and assumptions.

Issues, risks and actions

- Issue | Business impact | Mitigation | Responsible person | Due date | Escalation.

Client decisions and next steps

- Items requiring client approval and decision deadline.
- Action plan for the next 30 days.

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Closure and authorization

- For final reports: list handover files, statutory receipts, outstanding items and engagement closure date.
- Prepared by: _____ Reviewed by: _____ Client acknowledgment: _____

Client reference: GBO-CLI-_____ Date: _____

Confidential — share personal information using an agreed secure channel; never include passwords or OTPs.