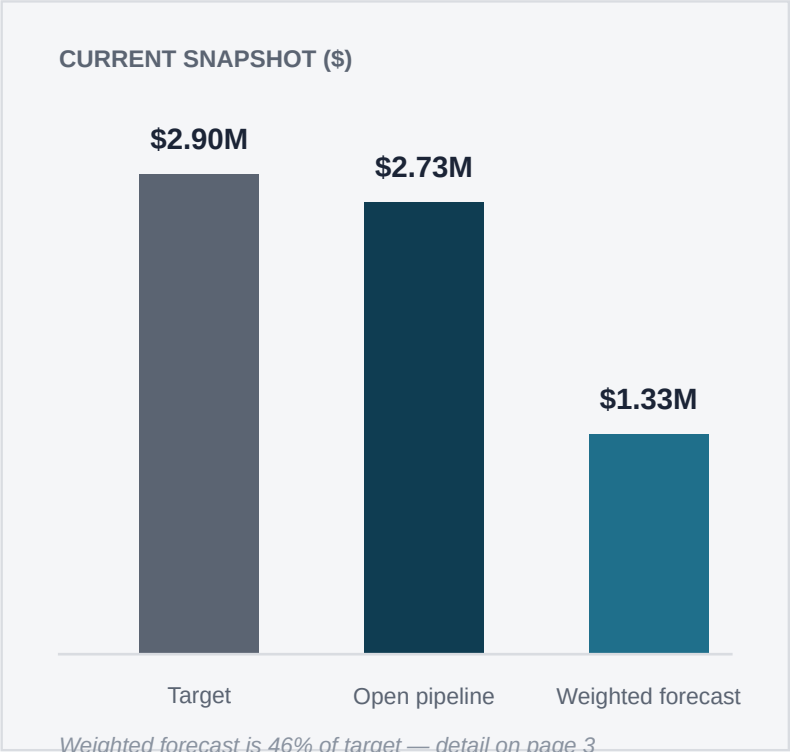


PIPELINE HEALTH & FORECAST REVIEW

Coverage is short and the gains are concentrated in a few deals

A working review of open pipeline, weighted forecast, coverage, concentration, aging and data hygiene for the revenue leadership team.

SNAPSHOT DATE	PRIOR SNAPSHOT	COVERAGE
2026-08-20	2026-07-18	0.94x



Call: pipeline will likely fall short of target unless coverage broadens beyond two owners and two deals

COVERAGE (OPEN / TARGET) 0.94x \$2.73M / \$2.90M	WEIGHTED FORECAST \$1.33M 46% of \$2.90M target	CONCENTRATION, TOP 2 DEALS 47% of weighted forecast in 2 of 16 open deals	STALE OPPORTUNITIES 4 of 16 no activity logged for 30+ days
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WHY THIS IS THE CALL

- Coverage is below 1.0x company-wide.**

Open pipeline \$2,730,000 against target \$2,900,000 = 0.94x (current-pipeline.csv; targets.csv, 2026-08-20). Even closing every open deal would not clear the target.
- Coverage is uneven, and the top owner's number rests on one deal.**

Morgan Patel: 0.57x coverage (\$485,000/\$850,000). Casey Nguyen: 1.42x, but \$420,000 of that owner's \$995,000 open pipeline is a single Commit opportunity, Dovetail Travel (006SYNAUG004).
- Weighted forecast is concentrated in two opportunities.**

Dovetail Travel (006SYNAUG004, Commit, \$420,000 weighted) and Aster Health (006SYNAUG001, BestCase, \$204,000 weighted) equal 46.9% of the \$1,330,000 total weighted forecast.
- Hygiene gaps limit confidence in the dates and stages behind the number.**

4 of 16 opportunities are stale (last activity 30+ days before snapshot); one (Elmstead Home, 006SYNAUG005) shows a close date of 2026-07-15, already past the 2026-08-20 snapshot, while still open in Proposal.

This is a data-supported exposure call, not a prediction that any named deal will close or slip — see pages 6–8 for the deals and open questions behind it.

PIPELINE VS. TARGET

Coverage clears target for two owners, not four — and weighted forecast clears it for none

OPEN PIPELINE

\$2,730,000

current

prior \$2,705,000

(+\$25,000)

WEIGHTED FORECAST

\$1,330,000

current

prior \$945,750

(+\$384,250)

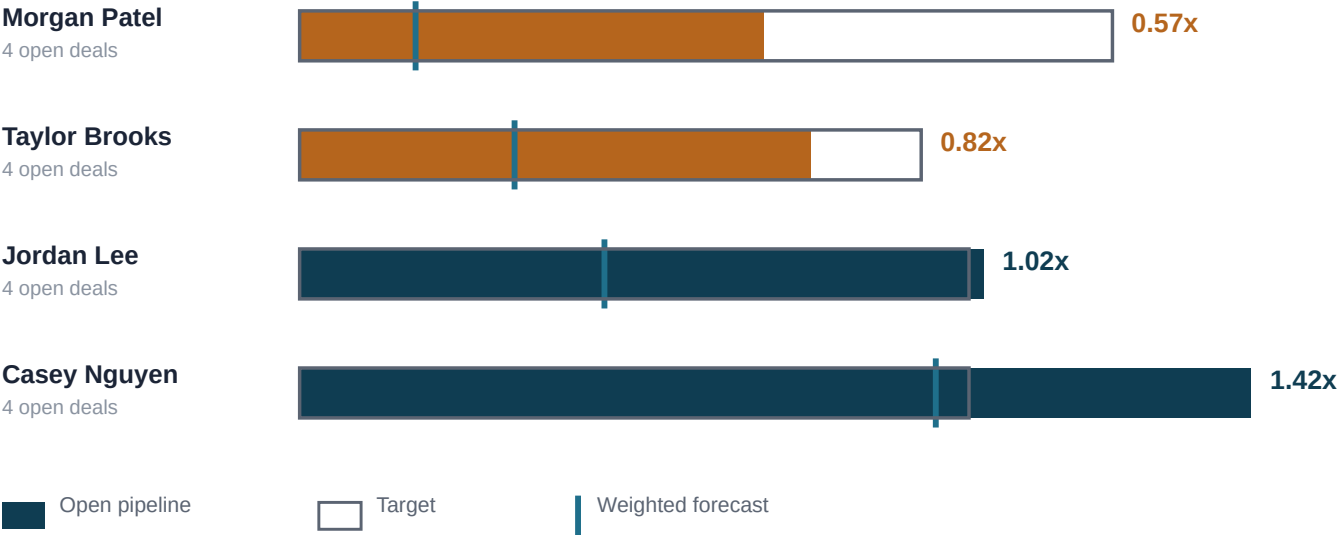
TARGET (2026-08-20 ONLY)

\$2,900,000

current

no prior-period target supplied

COVERAGE BY OWNER, CURRENT SNAPSHOT (OPEN PIPELINE ÷ TARGET)



Owner	Open now	Open prior	Target	Cover.
Morgan Patel	\$485K	\$485K	\$850K	0.57x
Jordan Lee	\$715K	\$715K	\$700K	1.02x
Casey Nguyen	\$995K	\$970K	\$700K	1.42x
Taylor Brooks	\$535K	\$535K	\$650K	0.82x
Company	\$2,730K	\$2,705K	\$2,900K	0.94x

Coverage = open pipeline ÷ target
(forecast-rules.md, rule 3). No prior-snapshot target file was supplied, so prior-period coverage cannot be shown.

MOVEMENT SINCE THE PRIOR SNAPSHOT

Weighted forecast rose \$384K, but the gain sits entirely in three renewal deals moving to higher-confidence categories

WEIGHTED FORECAST BRIDGE (\$)



DATA CONFLICT

Two of the upgraded deals (Dovetail Travel 006SYNAUG004; Junction Apparel 006SYNAUG010) show a StageEnteredDate that moved earlier, not later, even though the stage advanced and 33 days passed between snapshots. current-pipeline.csv vs prior-pipeline.csv are not reconciled here — see page 7.

OPPORTUNITIES WITH A RECORDED CHANGE (5 OF 16; 11 UNCHANGED)

Opportunity	Stage: prior → current	Category: prior → current	Amount: prior → current	Close date: prior → current	Weighted: prior → current (Δ)
Aster Health 006SYNAUG001	Proposal → Negotiation	Pipeline → BestCase	\$340,000 → \$340,000	2026-11-30 → 2026-11-30	\$85,000 → \$204,000 (+\$119,000)
Dovetail Travel 006SYNAUG004	Proposal → Negotiation	BestCase → Commit	\$420,000 → \$420,000	2026-09-30 → 2026-09-30	\$252,000 → \$420,000 (+\$168,000)
Harborlight Mobility 006SYNAUG008	Proposal → Proposal	BestCase → BestCase	\$290,000 → \$290,000	2026-09-30 → 2026-10-31 slipped 31 days	\$174,000 → \$174,000 (+\$0)
Junction Apparel 006SYNAUG010	Proposal → Negotiation	Pipeline → BestCase	\$260,000 → \$260,000	2026-09-27 → 2026-09-27	\$65,000 → \$156,000 (+\$91,000)
Lantern Beauty 006SYNAUG012	Proposal → Proposal	Pipeline → Pipeline	\$150,000 → \$175,000	2026-10-15 → 2026-10-15	\$37,500 → \$43,750 (+\$6,250)

Movement compares current-pipeline.csv (2026-08-20) to prior-pipeline.csv (2026-07-18) by Opportunity ID, per forecast-rules.md rule 7. Stage, category, amount and close-date movement are shown separately; none is treated as evidence a deal will close or slip (rule 8).

Two deals carry 47% of the forecast, and hygiene checks flag aging or quiet activity across most of the rest

CONCENTRATION

46.9%

of weighted forecast held in the two largest open opportunities



Top 2 deals: \$624,000
Remaining 14 deals: \$706,000

Dovetail Travel
006SYNAUG004 • Casey Nguyen
\$420,000 • Commit → weighted \$420,000

Aster Health
006SYNAUG001 • Jordan Lee
\$340,000 • BestCase → weighted \$204,000

Concentration = weighted value of the two largest open opportunities ÷ total weighted forecast (rule 4). Size is not evidence either deal will close.

AGING (60+ DAYS)

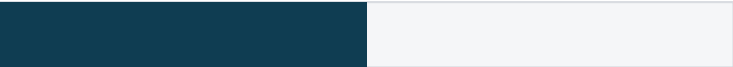
Opportunity age uses CreatedDate; stage age uses StageEnteredDate. Rule flags either at 60+ days (rule 6).

Opportunity age ≥ 60 days 16 / 16



range 96–196 days

Stage age ≥ 60 days 8 / 16



range 35–78 days

All 16 open opportunities were created 96–196 days before the snapshot, so every one is flagged on opportunity age — this reflects deal-cycle length in the source data, not a new problem. Stage age is more selective: 8 opportunities have sat in their current stage 60+ days.

STALE (30+ DAYS QUIET)

4 of 16

open opportunities (\$415,000) with no logged activity in 30+ days

Newbridge Education
006SYNAUG014 • Taylor Brooks
Last activity 2026-06-05 (76d) • \$95,000

Lantern Beauty
006SYNAUG012 • Casey Nguyen
Last activity 2026-06-20 (61d) • \$175,000

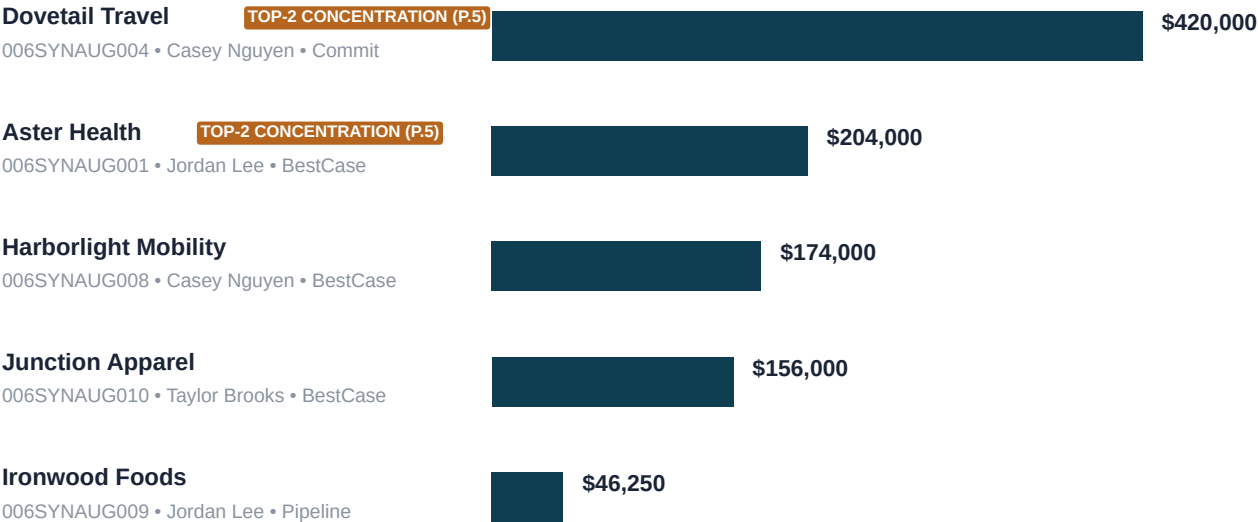
Elmstead Home
006SYNAUG005 • Jordan Lee
Last activity 2026-06-30 (51d) • \$60,000

Brookline Media
006SYNAUG002 • Taylor Brooks
Last activity 2026-07-03 (48d) • \$85,000

Stale = LastActivityDate 30+ days before the snapshot (rule 5). Not evidence of deal outcome.

The same handful of deals that carry the forecast also carry its open risk flags

LARGEST WEIGHTED CONTRIBUTORS, CURRENT SNAPSHOT



Ranked by weighted value = Amount × forecast-category weight (rule 2). Amounts and categories are as recorded in current-pipeline.csv on 2026-08-20; ranking is not a prediction of which deals will close.

FLAGGED FOR ATTENTION (HYGIENE, NOT A WIN/LOSS CALL)

Elmstead Home

006SYNAUG005 • Jordan Lee

\$60,000 • BestCase • weighted \$36,000

Close date 2026-07-15 has passed while stage is still Proposal (open); last activity 2026-06-30 (51 days stale).

Harborlight Mobility

006SYNAUG008 • Casey Nguyen

\$290,000 • BestCase • weighted \$174,000

Close date slipped 31 days since the prior snapshot (2026-09-30 → 2026-10-31); weighted value unchanged.

Lantern Beauty

006SYNAUG012 • Casey Nguyen

\$175,000 • Pipeline • weighted \$43,750

Stale 61 days (last activity 2026-06-20); amount increased \$150,000 → \$175,000 since prior snapshot.

Newbridge Education

006SYNAUG014 • Taylor Brooks

\$95,000 • Pipeline • weighted \$23,750

Stale 76 days (last activity 2026-06-05) — the longest activity gap in the open book.

Five owner actions follow directly from the numbers; four data issues need resolution before the next snapshot

RECOMMENDED ACTIONS

Action	Owner (from source data)	Why (source-cited)
• Validate Elmstead Home status	Jordan Lee (OWN-A01)	Close date 2026-07-15 has passed with the deal still open in Proposal; last activity 2026-06-30. Confirm status and correct the close date.
• Confirm Harborlight Mobility's revised timeline	Casey Nguyen (OWN-A04)	Close date moved 2026-09-30 → 2026-10-31 (31 days) since the prior snapshot. Confirm the new date.
• Re-engage four stale opportunities	Taylor Brooks, Casey Nguyen, Jordan Lee	No logged activity 30+ days on Newbridge Education (76d), Lantern Beauty (61d), Elmstead Home (51d), Brookline Media (48d) — \$415,000 combined.
• Build incremental pipeline where coverage is short	Morgan Patel, Taylor Brooks	Coverage is 0.57x (\$485,000/\$850,000) for Morgan Patel and 0.82x (\$535,000/\$650,000) for Taylor Brooks, both below 1.0x.
• Stress-test the two concentration deals	Casey Nguyen, Jordan Lee	Dovetail Travel (\$420,000, Commit) and Aster Health (\$340,000, BestCase) equal 46.9% of weighted forecast.

UNRESOLVED DATA PROBLEMS (HYGIENE — KEPT SEPARATE FROM JUDGMENT ABOVE)

- StageEnteredDate moved earlier despite forward stage progress on Dovetail Travel (006SYNAUG004: 2026-06-12 → 2026-06-05) and Junction Apparel (006SYNAUG010: 2026-06-24 → 2026-06-11) — a conflict between current-pipeline.csv and prior-pipeline.csv not resolved here. Owner: not specified in source.
- seller-notes.csv text is identical to the NextStep field in current-pipeline.csv for all 16 opportunities (verified) — no independent seller commentary is available to corroborate next steps.
- No prior-period targets.csv was supplied (only 2026-08-20 targets exist), so prior-snapshot coverage cannot be calculated or compared.
- Elmstead Home (006SYNAUG005) carries a close date (2026-07-15) that precedes the snapshot while the stage remains open — status is unconfirmed pending the action above.

What this deck is built on, what it could not check, and where to read the numbers with caution

SOURCE FILES (source-pack/august-pipeline/)

File	Content	Coverage	Used for
current-pipeline.csv	16 open opportunities, 1 row/opp	Snapshot 2026-08-20	Open pipeline, weighted forecast, aging, stale, concentration
prior-pipeline.csv	Same 16 Opportunity IDs	Snapshot 2026-07-18	Movement since prior snapshot (rule 7)
targets.csv	4 owner targets	Snapshot 2026-08-20 only	Coverage denominator (rule 3)
seller-notes.csv	1 note per opportunity	Note dates 2026-06-05 to 2026-08-12	Cross-checked; text matches NextStep exactly, adds no new content
forecast-rules.md	8 calculation rules	Effective 2026-08-20	All calculations on pages 2–6

MISSING INFORMATION

- Prior-period targets.csv (only the 2026-08-20 snapshot was supplied) — prior coverage cannot be shown.
- Currency unit is not stated in any source file; all amounts are shown as supplied, unlabeled.
- No Closed Won / Closed Lost history — category weights (rule 2) cannot be sanity-checked against actual outcomes.
- No independent seller commentary — seller-notes.csv duplicates the NextStep field for all 16 opportunities.
- No account segment, industry, or deal-source data to explain why coverage or concentration differs by owner.

LIMITATIONS TO KEEP IN VIEW

- 16 open opportunities across 4 owners is a small base; a single deal can move an owner's coverage sharply.
- The snapshots are 33 days apart (2026-07-18 to 2026-08-20), not a calendar month — movement is not a monthly rate.
- Stale (30-day) and aging (60-day) thresholds are applied exactly as written in forecast-rules.md; they are not validated against this book's typical sales-cycle length.
- Per forecast-rules.md rule 8, stale data, slippage and concentration are hygiene flags only — none is treated as evidence a deal will close or be lost.

Synthetic data — fictional companies, no real customer data. Prepared from source-pack/august-pipeline/ per forecast-rules.md. No stage change, note, target, owner or close date was invented.