

1 Forecast call

COVERAGE = OPEN PIPELINE ÷ TARGET

0.94x

= \$2,730,000 open pipeline ÷ \$2,900,000 target

OPEN PIPELINE

\$2.73M

\$2,730,000 · 16 rows, all open

Open by category

Commit 100% (1 opp)	\$420,000	\$950,000	\$1,360,000
Best Case 60% (4 opps)	\$420,000	\$570,000	\$340,000
Pipeline 25% (11 opps)			

WEIGHTED FORECAST

\$1.33M

\$1,330,000 · category split in bars below

TARGET

\$2.90M

\$2,900,000 = sum of 4 owner targets; no team target or period stated

Target \$2,900,000

2 Movement since 2026-07-18 (matched by Opportunity ID)

Measure	What moved (bold = change in weighted value)
Totals	Open \$2,705,000 → \$2,730,000 (+\$25,000); weighted \$945,750 → \$1,330,000 (+\$384,250); same 16 rows.
Stage	Proposal → Negotiation: Dovetail, Aster, Junction (3 rows).
Category	Dovetail Best Case → Commit (+\$168,000) · Aster Pipeline → Best Case (+\$119,000) · Junction Pipeline → Best Case (+\$91,000); amounts unchanged.
Amount	Lantern Beauty \$150,000 → \$175,000 (+\$25,000 amount, +\$6,250 weighted at 25%). The only amount change.
Close date	Harborlight Mobility 2026-09-30 → 2026-10-31 (+31 d). No amount, stage or category change. Only slip.
Weighted	+\$384,250 = +\$378,000 category-only + \$6,250 amount-only.

4 Management actions that follow (owner = CRM opportunity owner)

- 1 Confirm Dovetail Travel procurement approval and whether 2026-09-30 holds. Commit, \$420,000 = 32% of weighted forecast; 76 d in Negotiation; 41 d to close date.
Owner: Casey Nguyen
- 2 Requalify the four stale opportunities (\$415,000 open) — re-engage, re-date, or close out. Elmstead Home first: close date 36 d past, no activity for 51 d, still Best Case.
Owner: Jordan Lee (Elmstead) · Casey Nguyen (Lantern) · Taylor Brooks (Newbridge, Brookline)
- 3 Review Morgan Patel’s coverage plan: 0.57x = \$485,000 open ÷ \$850,000 target; all four rows in Pipeline (25%), weighted \$121,250.
Owner: Morgan Patel

3 Concentration & coverage by owner

Top-2 share of weighted forecast **46.9%** = (\$420,000 Dovetail Travel + \$204,000 Aster Health) ÷ \$1,330,000. Dovetail is the only Commit row.

Owner	Open	Target	Coverage
Jordan Lee	\$715,000	\$700,000	1.02x
Taylor Brooks	\$535,000	\$650,000	0.82x
Morgan Patel	\$485,000	\$850,000	0.57x
Casey Nguyen	\$995,000	\$700,000	1.42x
Team	\$2,730,000	\$2,900,000	0.94x

3 Aging & stale opportunities

Stage age 60+ d: 8 of 16 (\$1,530,000 open). Opportunity age 60+ d: 16 of 16 (oldest created 2026-02-05) — flag does not discriminate. Stale (>30 d no activity): 4 — \$415,000 open, \$124,750 weighted; Elmstead Home is the only stale Best Case row.

Stale opportunity	Idle	Amount	Owner
Newbridge Education	76d	\$95,000	Taylor Brooks
Lantern Beauty	61d	\$175,000	Casey Nguyen
Elmstead Home	51d	\$60,000	Jordan Lee
Brookline Media	48d	\$85,000	Taylor Brooks

5 Data problems to fix (pipeline hygiene, kept separate from judgment)

- 1 Past-due close date still open. Elmstead Home (006SYNAUG005): CloseDate 2026-07-15 is 36 d before the snapshot, row still Proposal / Best Case; also past due at 2026-07-18.
- 2 StageEnteredDate contradicts history. Dovetail (06-05), Junction (06-11) and Aster (07-02) reached Negotiation after 2026-07-18 yet carry entry dates before it; stage aging unreliable.
- 3 Amount edited without logged activity. Lantern Beauty (006SYNAUG012) \$150,000 → \$175,000 while LastActivityDate stayed 2026-06-20 (61 d).
- 4 Seller notes add nothing. seller-notes.csv repeats each row’s CRM NextStep verbatim with NoteDate = LastActivityDate; no independent commentary.
- 5 Target definition missing. targets.csv has 4 owner targets, no team target and no period; the \$2,900,000 denominator is a sum computed here.