

Pipeline Snapshot — Weekly Revenue Review

2026-08-20

prior snapshot 2026-07-18 · synthetic data

OPEN PIPELINE

\$2.73M

\$2,730,000 · 16 open opps

WEIGHTED FORECAST

\$1.33M

\$1,330,000 weighted

TARGET

\$2.90M

\$2,900,000 · 4 owners

COVERAGE = OPEN PIPELINE ÷ TARGET

0.94x

= \$2,730,000 ÷ \$2,900,000

Open pipeline is below the \$2.9M team target.

Weights (forecast-rules.md): Pipeline 25% · Best Case 60% · Commit 100%. No rows are Closed Won or Closed Lost. Target = sum of the four owner targets in targets.csv.

MOVEMENT SINCE 2026-07-18

Changed in amount

Lantern Beauty +\$25,000 (\$150k → \$175k). Stage and category unchanged — the only amount change. Open pipeline: \$2,705,000 → \$2,730,000 (+\$25,000).

Changed in forecast category only

(amounts unchanged)

		wtd change
Aster Health	Pipeline → Best Case	+\$119k
Dovetail Travel	Best Case → Commit	+\$168k
Junction Apparel	Pipeline → Best Case	+\$91k

All three also advanced Proposal → Negotiation.

Close date

Harborlight Mobility slipped 2026-09-30 → 2026-10-31 (+31 days); amount and category unchanged.

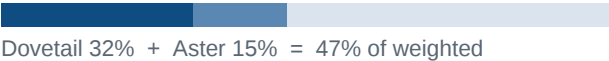
Net weighted movement

\$945,750 → \$1,330,000 (+\$384,250). \$378,000 of the rise is category upgrades; \$6,250 is the amount change. No opportunities added, closed, or removed (16 → 16, matched by ID).

CONCENTRATION

Top 2 open opportunities hold **47% of weighted forecast** — \$624,000 ÷ \$1,330,000:

Dovetail Travel	\$420.0k wtd (Commit)
Aster Health	\$204.0k wtd (Best Case)



AGING (flag at ≥ 60 days)

Opportunity age: all 16 open opps are ≥ 60 days old (96–196 days from CreatedDate).

Stage age: 8 of 16 have been ≥ 60 days in stage (64–78 days from StageEnteredDate). Two of the eight rest on suspect timestamps — see data problems.

STALE (> 30 days since activity)

Newbridge Education	76 d	\$95k	T. Brooks
Lantern Beauty	61 d	\$175k	C. Nguyen
Elmstead Home	51 d	\$60k	J. Lee
Brookline Media	48 d	\$85k	T. Brooks

Total \$415,000 open / \$124,750 weighted. Kingswell is at exactly 30 days — not stale under the > 30-day rule.

Per rule 8: stale data, slippage, and concentration are hygiene flags, not evidence a deal will close or be lost.

MANAGEMENT ACTIONS

- Casey Nguyen** — Dovetail (\$420k Commit = 32% of weighted forecast): complete procurement approval (recorded next step) and re-confirm the Commit call — its stage timestamp is inconsistent (below).
- Jordan Lee** — Elmstead: close date 2026-07-15 has passed and no activity for 51 days. Confirm the evaluation is active (recorded next step); reset close date or disposition.
- Taylor Brooks · Casey Nguyen** — Re-engage or requalify the four stale opportunities (\$415,000 open) before the next weekly review.

DATA PROBLEMS TO FIX

- Elmstead (...005): CloseDate 2026-07-15 is before the snapshot date on an open deal.
- Dovetail & Junction: StageEnteredDate moved backward vs the prior snapshot (06-12 → 06-05; 06-24 → 06-11) while the stage advanced — stage aging unreliable for both.
- Lantern: amount raised +\$25k, yet LastActivityDate shows no activity for 61 days — inconsistent record.
- targets.csv: per-owner targets only, no period stated; team target = sum of four owners.

SOURCES source-pack/august-pipeline/: current-pipeline.csv (2026-08-20), prior-pipeline.csv (2026-07-18), targets.csv, seller-notes.csv, forecast-rules.md. All figures calculated from these files under the stated rules; weights Pipeline 25% / Best Case 60% / Commit 100%. LIMITATIONS Target period is not stated in targets.csv. Two stage timestamps are inconsistent between snapshots, so those stage ages are unreliable. Staleness, slippage, and concentration signal hygiene risk only — not close or loss outcomes. Synthetic data: fictional companies.