

FORECAST CALL

Open Pipeline

\$2,730,000

Weighted Forecast

\$1,330,000

Coverage

94%

\$2.73M / \$2.90M

Target

\$2,900k

MOVEMENT SINCE PRIOR SNAPSHOT

Pipeline

+\$25k

Aster Health, Dovernail Travel & Junction Apparel moved to Negotiation with higher confidence forecast categories

Forecast

+\$384k

Category

4 Upgraded

(2026-07-18)

CONCENTRATION & AGING

Concentration

47%

top 2 opps

Stale Opps

4

\$415k

Stage Aged

8

≥60 days

All Aged

16/16

>60d old

PIPELINE BY OWNER

Jordan Lee

102%

\$715k/\$700k

Taylor Brooks

82%

\$535k/\$650k

Morgan Patel

57%

\$485k/\$850k

Casey Nguyen

142%

\$995k/\$700k

MANAGEMENT ACTIONS

Activity Follow-up

Taylor Brooks, Morgan Patel

Proposal Acceleration

Taylor Brooks

Stage Review

All owners

Brookline Media, Elmstead Home, Newbridge Education (60+ days stale)

Newbridge Education 76d no recent activity — escalate

8 opportunities in Proposal Negotiation ≥60 days

DATA QUALITY

- All 16 open opps exceed 60-day age (created before early June)
- 4 opps stale >30 days; Lantern Beauty +\$25k, Harborlight Mobility close date +1 month