

OPEN PIPELINE

\$2,730,000

16 open opportunities; no Closed Won or Closed Lost row in either file · Rule 1

WEIGHTED FORECAST

\$1,330,000

Commit 420,000 + BestCase 570,000 + Pipeline 340,000 · Rule 2

TARGET

\$2,900,000

Sum of the 4 owner targets; no team total is supplied

COVERAGE = OPEN PIPELINE ÷ TARGET

0.94x

\$2,730,000 ÷ \$2,900,000 · Rule 3
prior snapshot 2,705,000 ÷ 2,900,000 = 0.93x

Weighted forecast is \$1,570,000 below target (1,330,000 less 2,900,000) · weighted ÷ target = 0.46x · coverage of 0.94x is below 1.00x before any win-rate assumption

2 · MOVEMENT SINCE 2026-07-18

same 16 IDs · none added or removed

CHANGED IN AMOUNT

+ \$25,000 amount · + \$6,250 weighted

Lantern Beauty (006SYNAUG012) 150,000 → 175,000 — the only amount change. Open pipeline 2,705,000 → 2,730,000 (+0.9%).

CHANGED IN CATEGORY & STAGE, NOT AMOUNT

all 3: Proposal → Negotiation

Opportunity	Forecast category	Weighted value
Dovetail Travel	BestCase → Commit	252,000 → 420,000
Aster Health	Pipeline → BestCase	85,000 → 204,000
Junction Apparel	Pipeline → BestCase	65,000 → 156,000

CLOSE DATE ONLY

Harborlight Mobility 2026-09-30 → 2026-10-31 (+31 days)

Weighted forecast 945,750 → 1,330,000

+384,250

98.4% RE-CATEGORISATION = +378,000

Almost all of the lift is re-categorisation, not new amount (Rule 8).

3A · CONCENTRATION & AGING

TOP 2 OPEN OPPS = 46.9% OF WEIGHTED

Dovetail Travel (Commit)	420,000
Aster Health (BestCase)	204,000

624,000 ÷ 1,330,000 46.9%

Rule 4. Dovetail Travel alone is 31.6%.

AGING FLAGGED AT 60+ DAYS (RULE 6)

Opportunity age 16 of 16

CreatedDate · range 96–196 days

Stage age 8 of 16

StageEnteredDate · range 64–78 days

Those 8 hold \$1,530,000 of amount and \$890,000 of weighted forecast — 66.9% of the weighted total.

3B · STALE OPPORTUNITIES

Rule 5 · cutoff 2026-07-21

4 of 16 last activity more than 30 days old

Opportunity	Owner	Last act.	Days	Amount
Newbridge Education	Brooks	2026-06-05	76	95,000
Lantern Beauty	Nguyen	2026-06-20	61	175,000
Elmstead Home	Lee	2026-06-30	51	60,000
Brookline Media	Brooks	2026-07-03	48	85,000

Total amount / weighted value

415,000 / 124,750

Share of weighted forecast 9.4%

Elmstead Home is stale and past its close date. Lantern Beauty is the one opportunity whose amount was raised this cycle, and it has been stale 61 days.

Staleness is a follow-up signal, not evidence of outcome (Rule 8).

4 · MANAGEMENT ACTIONS

evidence and follow-up only · no deal called won or lost (R8)

1 Casey Nguyen (OWN-A04)

Bring evidence for the Dovetail Travel Commit call: \$420,000 is 31.6% of the weighted forecast, it moved BestCase to Commit this cycle, it closes 2026-09-30, and it has sat 76 days in stage.

2 Morgan Patel (OWN-A03)

Work the largest target and the weakest coverage: 485,000 ÷ 850,000 = 0.57x. All four opportunities sit in the Pipeline category, so weighted is 121,250, or 0.14x of target.

3 Taylor Brooks (OWN-A02)

Refresh or disposition Newbridge Education (76 days) and Brookline Media (48 days), \$180,000 combined, before the next snapshot.

5 · DATA PROBLEMS TO FIX

hygiene, not judgment

LastActivityDate is identical on all 16 records in both snapshots, 33 days apart. The Rule 5 stale count cannot be verified and is probably understated.

StageEnteredDate moved backward on two records that also changed stage: Dovetail Travel 2026-06-12 to 2026-06-05, Junction Apparel 2026-06-24 to 2026-06-11, so the stage age of both is unreliable.

Elmstead Home (006SYNAUG005) closes 2026-07-15, 36 days before the snapshot, yet is still open at BestCase. Owner Jordan Lee.

seller-notes.csv repeats the current-pipeline NextStep verbatim and its NoteDate equals LastActivityDate on all 16 rows, so it is not independent corroboration.

targets.csv holds 4 owner rows only; the \$2,900,000 denominator is a sum computed here.

SOURCES, RULES & LIMITATIONS

Sources — source-pack/august-pipeline/: current-pipeline.csv (16 rows, 2026-08-20), prior-pipeline.csv (16 rows, 2026-07-18), targets.csv (4 owner rows), seller-notes.csv (16 rows), forecast-rules.md. Rules as written: weights Pipeline 25% / BestCase 60% / Commit 100% (R2); coverage = open ÷ target (R3); concentration = 2 largest open by weighted (R4); stale = last activity over 30 days (R5); aging at 60+ days (R6).

Snapshot date 2026-08-20 · synthetic data, fictional companies

Open questions — the rules set no close-date window, but 12 of 16 opportunities close after 2026-09-30 (one on 2027-03-31), so the 0.94x coverage figure mixes periods; the period each target covers is not stated. No manager or RevOps owner appears anywhere in the pack, so panel 5 has no named owner. No win-rate or conversion history was supplied, so no probability of close is stated.