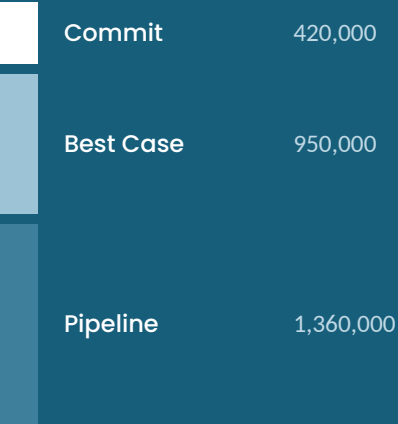


OPEN PIPELINE BY FORECAST CATEGORY

2,730,000

open across 16 opportunities · current-pipeline.csv



Weighted forecast 1,330,000 · target total 2,900,000

PIPELINE HEALTH AND FORECAST

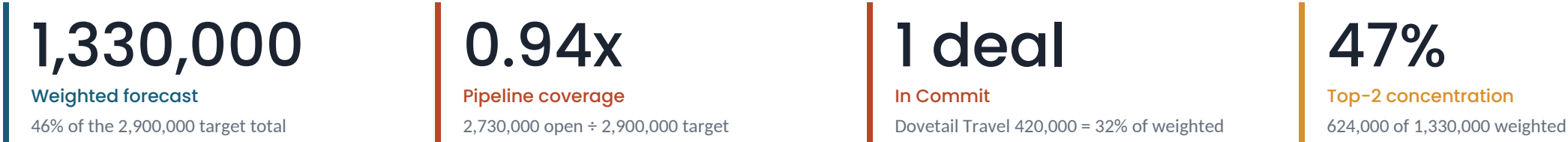
The August forecast is exposed on every supplied measure

Where the gap sits, what moved since the prior snapshot, and the actions and data fixes that should happen before the next forecast call.

Snapshot date	Prior snapshot	Audience
2026-08-20	2026-07-18	Revenue leadership

Source boundary: source-pack/august-pipeline/ — current-pipeline.csv, prior-pipeline.csv, targets.csv, seller-notes.csv, forecast-rules.md. Rules applied exactly as written in forecast-rules.md. Synthetic data: fictional companies, no real customer data.

Call: the forecast is short of target on every supplied measure, and the only committed value is one deal



THREE REASONS THE FORECAST IS EXPOSED

- 01

Even full conversion would miss

Open pipeline is 2,730,000 against a 2,900,000 target total, so coverage is 0.94x. Two of four owners are below 1.0x: Morgan Patel 0.57x and Taylor Brooks 0.82x.

targets.csv; current-pipeline.csv
- 02

Upside is recent and its dates conflict

Weighted forecast rose 384,250 since 18 July; 378,000 of that is three stage moves to Negotiation (006SYNAUG001, 004, 010). Each has a StageEnteredDate earlier than the prior snapshot that still showed Proposal.

prior-pipeline.csv vs current-pipeline.csv
- 03

Part of the base shows no activity

Four opportunities (415,000) have no activity for more than 30 days; one (006SYNAUG005) carries a close date 36 days in the past and is still Best Case. A 290,000 Best Case deal (006SYNAUG008) slipped 31 days.

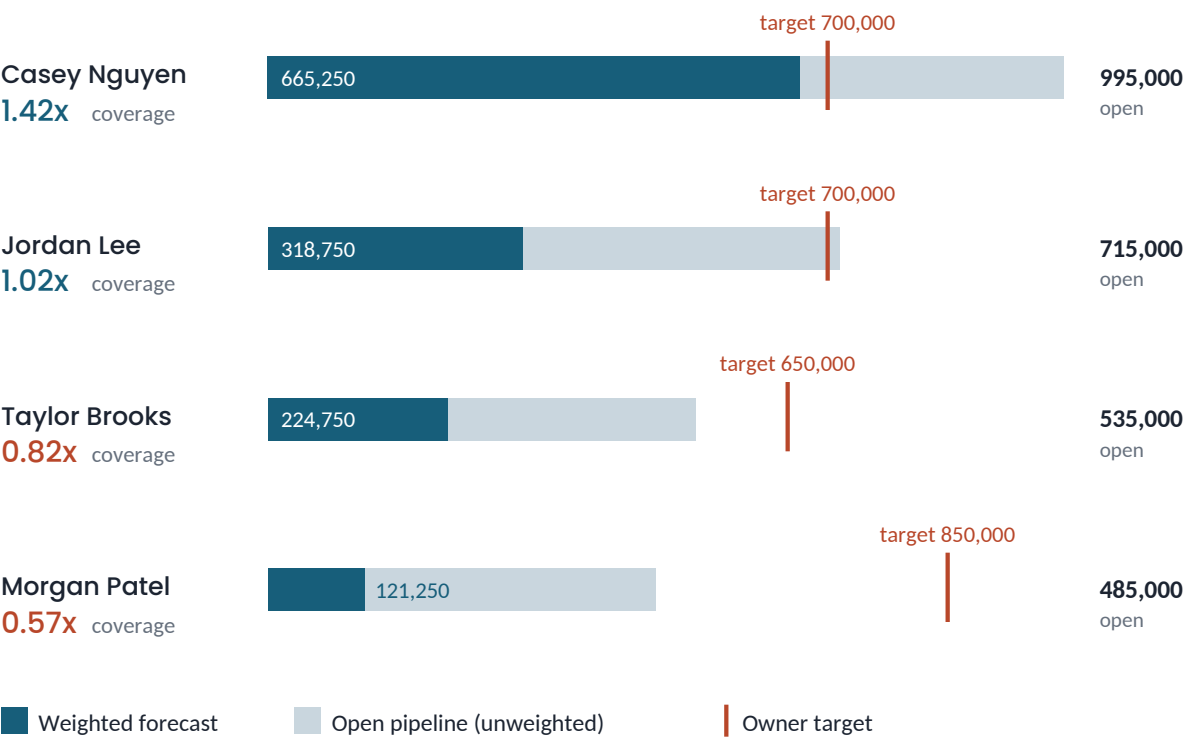
current-pipeline.csv LastActivityDate, CloseDate

IMPLICATION

Treat 1,330,000 as the supported weighted view and 420,000 as committed. Do not raise the call until the three stage advances are verified against activity records and the overdue and stale records are resolved. None of these flags proves a deal will close or be lost (forecast-rules.md, rule 8).

Open pipeline covers 0.94x of the target total; two of four owners are below 1.0x and no owner has more than 95% weighted

OPEN PIPELINE AND WEIGHTED FORECAST VS TARGET, BY OWNER



Coverage = open pipeline ÷ target (rule 3): 2,730,000 ÷ 2,900,000 = **0.94x**. Prior open pipeline was 2,705,000 (0.93x against the same targets; prior-pipeline.csv). No team-level target, target period, or prior targets are supplied, and there are no Closed Won rows, so attainment to date cannot be shown.

INPUTS AND RESULTS

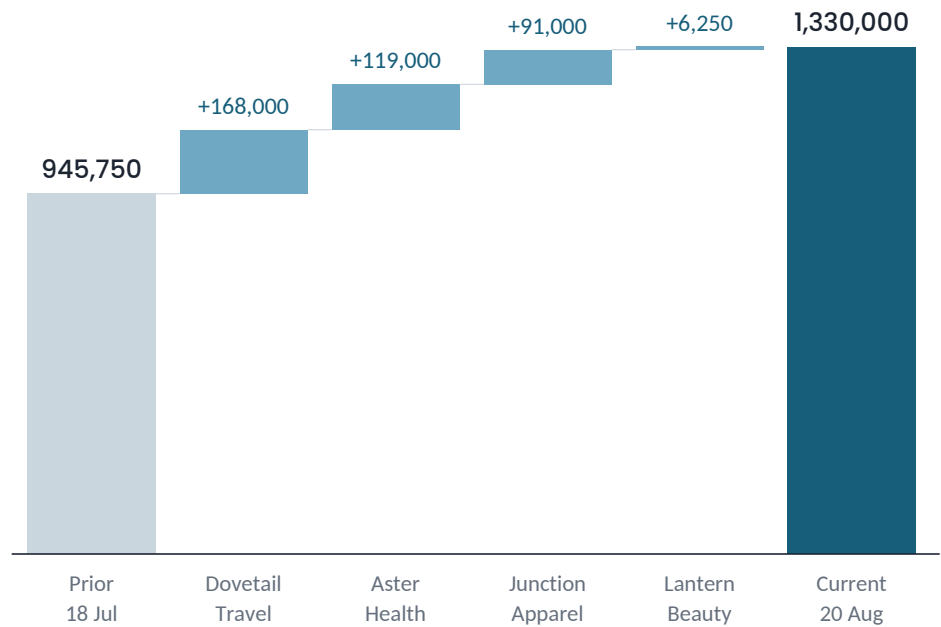
Owner	Open	Weighted	Target	Cover	Wtd ÷ tgt
Casey Nguyen	995,000	665,250	700,000	1.42x	95%
Jordan Lee	715,000	318,750	700,000	1.02x	46%
Taylor Brooks	535,000	224,750	650,000	0.82x	35%
Morgan Patel	485,000	121,250	850,000	0.57x	14%
Total	2,730,000	1,330,000	2,900,000	0.94x	46%

WEIGHTED FORECAST BUILD (forecast-rules.md rule 2)

Commit	1 opp	420,000	× 100%	420,000
Best Case	4 opps	950,000	× 60%	570,000
Pipeline	11 opps	1,360,000	× 25%	340,000
Closed Won / Lost	0 rows	—	100% / 0%	0
Weighted forecast	16	2,730,000		1,330,000

Weighted forecast rose 384,250 since 18 July, almost all from three stage advances whose entered dates conflict with the prior snapshot

WEIGHTED FORECAST BRIDGE, PRIOR TO CURRENT



Open pipeline moved 2,705,000 → 2,730,000 (+25,000): only the Lantern Beauty amount changed. Weighted total 945,750 → 1,330,000 (+384,250). No opportunities were added, closed, or removed.

FIELD-LEVEL MOVEMENT BY OPPORTUNITY (each movement type shown separately)

Opportunity	Stage	Category	Amount	Close (2026)	Wtd change
Dovetail Travel 006SYNAUG004 · date conflict	Proposal → Negotiation	Best Case → Commit	—	—	+168,000
Aster Health 006SYNAUG001 · date conflict	Proposal → Negotiation	Pipeline → Best Case	—	—	+119,000
Junction Apparel 006SYNAUG010 · date conflict	Proposal → Negotiation	Pipeline → Best Case	—	—	+91,000
Lantern Beauty 006SYNAUG012	no change	no change	150,000 → 175,000	—	+6,250
Harborlight Mobility 006SYNAUG008	no change	no change	—	09-30 → 10-31	0
11 other opportunities	no change	no change	—	—	0

SOURCE CONFLICT — STAGE ADVANCES CANNOT BE DATED

Each advanced deal now shows a StageEnteredDate before the 2026-07-18 snapshot that still recorded it in Proposal: Aster Health 2026-07-02; Dovetail Travel 2026-06-05 (prior Proposal entry 2026-06-12); Junction Apparel 2026-06-11 (prior Proposal entry 2026-06-24). Stage aging for these three deals is therefore unreliable, and the timing of 378,000 of the 384,250 weighted increase cannot be verified from the supplied files.

Hygiene: four stale deals (415,000), eight deals 60+ days in stage, and two deals holding 47% of the weighted forecast

Opportunity		Category	Amount	Weighted	Days since activity	Opp age (d)	Stage age (d)
Dovetail Travel	...004	Commit	420,000	420,000	12	196	76
Aster Health	...001	Best Case	340,000	204,000	10	171	49
Harborlight Mobility	...008	Best Case	290,000	174,000	15	192	72
Junction Apparel	...010	Best Case	260,000	156,000	8	131	70
Ironwood Foods	...009	Pipeline	185,000	46,250	20	163	41
Lantern Beauty	...012	Pipeline	175,000	43,750	61	188	68
Goodtrail Pets	...007	Pipeline	150,000	37,500	22	104	43
Kingswell Hospitality	...011	Pipeline	140,000	35,000	30	100	39
Mossland Outdoor	...013	Pipeline	130,000	32,500	18	159	37
Cobalt Labs	...003	Pipeline	120,000	30,000	14	108	47
Pinecrest Telecom	...016	Pipeline	110,000	27,500	16	184	64
Fortis Bank	...006	Pipeline	95,000	23,750	17	135	74
Newbridge Education	...014	Pipeline	95,000	23,750	76	127	66
Brookline Media	...002	Pipeline	85,000	21,250	48	139	78
Oakridge Goods	...015	Pipeline	75,000	18,750	23	96	35
Elmstead Home	...005	Best Case	60,000	36,000	51	167	45

Stale: >30 days since last activity (rule 5)

Aging flag: 60 days or more (rule 6)

Kingswell Hospitality is at exactly 30 days — not stale by rule 5.

CONCENTRATION (rule 4)

Two largest open opportunities by Amount: Dovetail Travel 420,000 (Commit, weighted 420,000) and Aster Health 340,000 (Best Case, weighted 204,000).
 $(420,000 + 204,000) \div 1,330,000 = 46.9\%$.
Prior: $(252,000 + 85,000) \div 945,750 = 35.6\%$. If “largest” is read by weighted value, the prior pair is Dovetail + Harborlight = 45.0%; the current pair is unchanged.

STALE (rule 5)

4 of 16 opportunities: Newbridge 76 d, Lantern 61 d, Elmstead 51 d, Brookline 48 d. Amount 415,000; weighted 124,750 (9% of weighted). Prior stale count cannot be computed — see page 7.

AGING (rule 6)

Opportunity age: all 16 are ≥60 days old (96–196 days), so the flag does not discriminate. Stage age: 8 of 16 are ≥60 days (64–78 days), totalling 1,530,000 of open pipeline. Stage age for the three advanced deals rests on conflicting StageEnteredDates (page 4).

Coverage (rule 3) $2,730,000 \div 2,900,000 = 0.94x$ — by owner on page 3.

Upside rests on three Negotiation deals worth 780,000 of weighted value; downside sits in a slipped 290,000 deal and 415,000 of stale pipeline

UPSIDE — WHAT SUPPORTS THE 1,330,000

Dovetail Travel 006SYNAUG004

Commit · Negotiation · 420,000 · close 2026-09-30 · Casey Nguyen

Only Commit deal; 32% of weighted forecast. Moved from Best Case/Proposal since 18 Jul. Last activity 2026-08-08. Next step: “Complete procurement approval.” 76 days in stage on a StageEnteredDate (2026-06-05) that predates the prior Proposal entry.

Aster Health 006SYNAUG001

Best Case · Negotiation · 340,000 · close 2026-11-30 · Jordan Lee

Moved from Pipeline/Proposal; weighted +119,000. Last activity 2026-08-10. Next step: “Confirm renewal scope with finance.” StageEnteredDate 2026-07-02 predates the prior snapshot that showed Proposal.

Junction Apparel 006SYNAUG010

Best Case · Negotiation · 260,000 · close 2026-09-27 · Taylor Brooks

Moved from Pipeline/Proposal; weighted +91,000. Last activity 2026-08-12. Next step: “Confirm final approver.” 70 days in stage on a StageEnteredDate (2026-06-11) earlier than the prior Proposal entry (2026-06-24).

DOWNSIDE — WHAT COULD TAKE IT LOWER

Harborlight Mobility 006SYNAUG008

Best Case · Proposal · 290,000 · close 2026-09-30 → 2026-10-31 · Casey Nguyen

Close date slipped 31 days; 72 days in Proposal; weighted 174,000 unchanged. Last activity 2026-08-05. Next step: “Review the revised close plan.” Slippage is recorded fact, not evidence of loss.

Elmstead Home 006SYNAUG005

Best Case · Proposal · 60,000 · close 2026-07-15 (36 days past) · Jordan Lee

Close date already passed in both snapshots; no activity for 51 days (2026-06-30). Next step: “Confirm whether the evaluation is active.” Still carried at 60% (36,000 weighted).

Lantern · Newbridge · Brookline 006SYNAUG012 · 006SYNAUG014 · 006SYNAUG002

Pipeline · 355,000 combined · stale 61 / 76 / 48 days

Lantern amount rose 150,000 → 175,000 with no recorded activity since 2026-06-20. Brookline closes 2026-09-30 with no activity since 2026-07-03. Combined weighted 88,750; owners Casey Nguyen, Taylor Brooks, Taylor Brooks.

Reading this page. Upside deals carry 780,000 of the 1,330,000 weighted forecast (59%). Downside items total 705,000 of amount and 298,750 of weighted value. Seller notes add no narrative beyond the NextStep field, so no causal explanation for any movement is available in the source files.

Action: verify the three stage advances, resolve the overdue and stale records, and hold the call at 1,330,000 until both are done

MANAGEMENT ACTIONS (judgment — for leadership decision)

- 1 **Hold the forecast call at 1,330,000 weighted / 420,000 commit**
Revenue leadership
 Coverage 0.94x and one Commit deal; do not raise until items 2–3 are closed (pages 2–3).
- 2 **Verify the three Negotiation advances against activity records**
Casey Nguyen (004), Jordan Lee (001), Taylor Brooks (010)
 They supply 378,000 of the 384,250 weighted increase and carry conflicting StageEnteredDates (page 4).
- 3 **Decide whether Harborlight Mobility stays in Best Case after a 31-day slip**
Casey Nguyen (008)
 Close moved 2026-09-30 → 2026-10-31; 72 days in Proposal; recorded next step “Review the revised close plan.”
- 4 **Decide how to address coverage below 1.0x for two owners**
Morgan Patel (0.57x), Taylor Brooks (0.82x)
 Patel’s four deals are all Discovery/Proposal Pipeline (weighted 121,250 vs 850,000 target).
- 5 **Re-baseline coverage once the target period and closed-won to date are supplied**
Owner not recorded in sources
 Targets file gives no period, no team target, and no prior targets; no Closed Won rows exist.

UNRESOLVED DATA PROBLEMS (hygiene — for Rev Ops / record owners)

- **StageEnteredDate conflicts on 001, 004, 010**
 Current entered dates precede the 2026-07-18 snapshot that showed Proposal. Owners: Lee, Nguyen, Brooks.
- **Prior snapshot carries current activity dates**
 All 16 LastActivityDates in prior-pipeline.csv equal the current file; 12 postdate 2026-07-18. Activity movement and prior stale counts cannot be measured. Owner not recorded.
- **Overdue close date still open**
 Elmstead Home (005) CloseDate 2026-07-15 is 36 days past the snapshot; stale 51 days. Owner: Jordan Lee.
- **Amount changed without recorded activity**
 Lantern Beauty (012) 150,000 → 175,000; last activity 2026-06-20. Owner: Casey Nguyen.
- **Stale records**
 Newbridge (014, 76 d), Brookline (002, 48 d) — Taylor Brooks. Kingswell (011) reaches 31 days on 2026-08-21 — Morgan Patel.
- **Seller notes duplicate NextStep**
 seller-notes.csv text and dates match the pipeline NextStep and LastActivityDate fields exactly; no independent commentary exists. Owner not recorded.

Every figure traces to five files in source-pack/august-pipeline; the gaps below bound what this deck can and cannot say

SOURCES USED

current-pipeline.csv 16 open opportunities, snapshot 2026-08-20; stages Discovery/Proposal/Negotiation; no Closed rows.

prior-pipeline.csv 16 opportunities, snapshot 2026-07-18; same OpportunityIds; used for movement.

targets.csv 4 owner targets dated 2026-08-20 (700,000 / 650,000 / 850,000 / 700,000). Total 2,900,000 is derived.

seller-notes.csv 16 notes; text and dates identical to pipeline NextStep and LastActivityDate.

forecast-rules.md Weights, coverage, concentration, stale (>30 d), aging (≥60 d), comparison and interpretation rules.

MISSING INFORMATION

Target period. targets.csv does not say which quarter or year the targets cover, so coverage is against an undated target total.

Closed-won to date. No Closed Won or Closed Lost rows in either snapshot; attainment cannot be shown.

Team target and prior targets. Only owner targets exist; the team total is a sum and prior coverage uses current targets.

Stage history. No stage-change log; advancement dates rest on StageEnteredDate, which conflicts for three deals.

Independent seller commentary. No reasons for slippage, amount change, or stage moves are recorded anywhere in the sources.

Currency. Amount and Target are unlabelled; figures are shown as supplied.

LIMITATIONS OF THIS DECK

Not a probability view. Weighted values apply the fixed category weights in rule 2; they are not deal-level likelihoods.

Flags are not outcomes. Stale, slipped, aged, and concentrated are recorded conditions, not proof of close or loss (rule 8).

Prior activity data unusable. Because prior LastActivityDates equal current ones, no change in stale status can be shown.

Concentration definition. “Two largest” read as largest by Amount; the weighted-value reading changes only the prior figure (35.6% vs 45.0%).

Aging flag saturates. Every opportunity is ≥60 days old, so opportunity age does not separate deals; stage age does.

Owners. Actions are attached only to OwnerName values recorded in the files; no other owners were assigned.