

Pipeline Health & Forecast

Where the August forecast is exposed — and what to do about it

The call, in one line:

The forecast is exposed. Weighted forecast is \$1,330,000 — 46% of the \$2,900,000 combined owner target — and total open pipeline (\$2,730,000) cannot cover target even if every deal closes.

\$2.73M

Open pipeline (16 deals)

0.94×

Coverage vs \$2.90M target

\$1.33M

Weighted forecast

46.9%

Weighted value in top 2 deals

Exposed: weighted forecast covers 46% of target; full pipeline cannot bridge the gap

Even a 100% win rate on all 16 open deals leaves the team \$170,000 short of the \$2,900,000 combined owner target.

FORECAST CALL

Hold the forecast at the weighted view — \$1,330,000 — and treat anything above it as unverified upside until the two conflicting stage upgrades are confirmed.

The weighted forecast improved \$384,250 since 2026-07-18, but \$259,000 of that gain sits in two deals whose stage-entry dates moved backwards between snapshots (006SYNAUG004, 006SYNAUG010) — a data conflict, not evidence of risk or safety.

Action focus: verify the two upgraded deals, re-qualify the past-due Best Case deal, re-engage four stale deals, and open pipeline generation — the target cannot be met from current pipeline alone.

Inputs: current-pipeline.csv (16 rows) · targets.csv · forecast-rules.md rules 1–4

- 1

Pipeline is short of target before any losses

Open pipeline \$2,730,000 vs combined target \$2,900,000 → coverage 0.94×. Weighted forecast \$1,330,000 = 45.9% of target. (current-pipeline.csv; targets.csv, 2026-08-20)
- 2

Nearly half the weighted forecast sits in two deals

Dovetail Travel (\$420,000 Commit) + Aster Health (\$204,000 weighted) hold \$624,000 of \$1,330,000 = 46.9%. Concentration is exposure, not a predicted loss. (rule 4; rule 8)
- 3

The month's gain rests on upgrades with conflicting dates

+\$384,250 weighted since 2026-07-18 came from three category upgrades; two show StageEnteredDate earlier than in the prior snapshot. (current vs prior-pipeline.csv, 006SYNAUG004 / 006SYNAUG010)
- 4

Hygiene flags cluster in the unweighted tail

4 deals / \$415,000 stale >30 days; 8 of 16 deals ≥60 days in stage; one Best Case deal's close date passed on 2026-07-15 (006SYNAUG005). Flags are not outcomes. (rules 5, 6, 8)

Coverage is 0.94× — the book is smaller than the target it must fund

All calculation inputs shown. Targets are supplied only for 2026-08-20; the target period is not stated in targets.csv.

COVERAGE = OPEN PIPELINE ÷ TARGET

0.94×
current

\$2,730,000 ÷ \$2,900,000

Prior (2026-07-18): 0.93× = \$2,705,000 ÷ \$2,900,000

WEIGHTED FORECAST — INPUTS (RULE 2)

Category	Count	Amount	Weighted
Commit × 100%	1 deal	\$420,000	\$420,000
Best Case × 60%	4 deals	\$950,000	\$570,000
Pipeline × 25%	11 deals	\$1,360,000	\$340,000

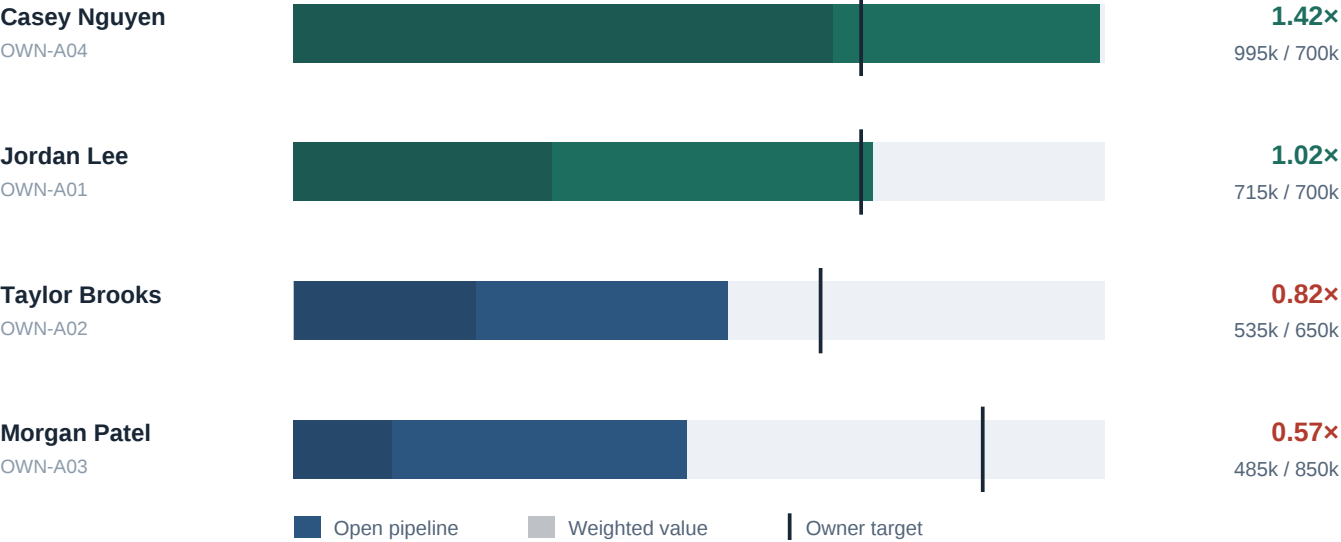
Weighted forecast (current) \$1,330,000

Prior: \$770,000×60% + \$1,935,000×25% = \$945,750

No Closed Won / Closed Lost rows exist in either snapshot.

OPEN PIPELINE VS TARGET, BY OWNER

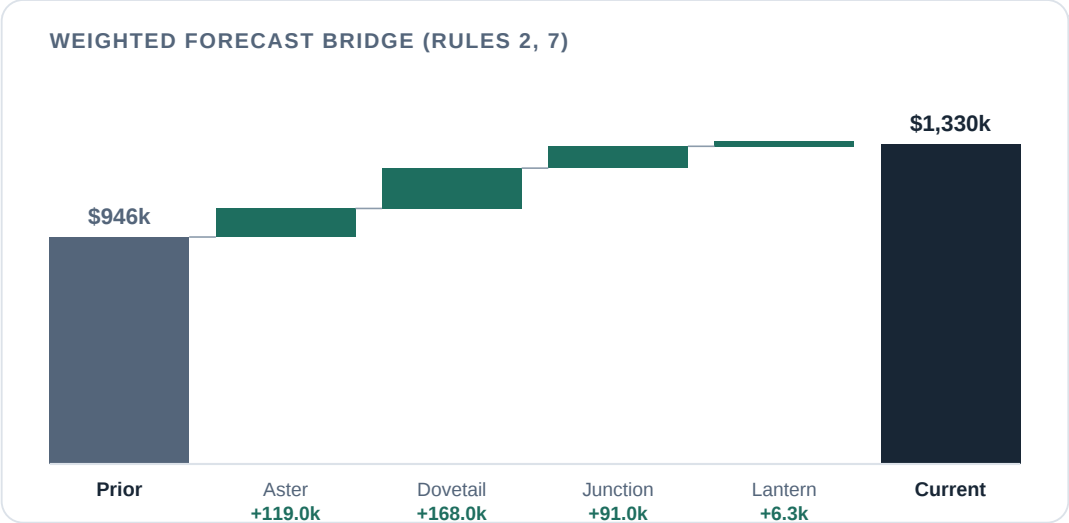
Owner-level coverage = open pipeline ÷ owner target (targets.csv, 2026-08-20)



Largest gap: Morgan Patel, 0.57× (\$485,000 open vs \$850,000 target). Owner totals from current-pipeline.csv.

Weighted forecast rose \$384,250 — but \$259,000 of the gain carries a data conflict

Same 16 opportunity IDs in both snapshots: nothing added, closed, won, or lost. Open pipeline moved \$2,705,000 → \$2,730,000 (+\$25,000).



UNRESOLVED CONFLICT — DO NOT TREAT AS RESOLVED

006SYNAUG004 Dovetail: stage Proposal → Negotiation, yet StageEnteredDate moved 2026-06-12 → 2026-06-05. 006SYNAUG010 Junction: Proposal → Negotiation, StageEnteredDate 2026-06-24 → 2026-06-11.

A stage entered before the prior snapshot contradicts the prior snapshot's record. Until reconciled, stage aging for these deals is unreliable and the +\$259,000 upgrade value is unverified.

ALL CHANGED DEALS — EACH MOVEMENT SHOWN SEPARATELY (RULE 7)

Deal / ID	Stage	Category	Amount	Close date	Weighted Δ
Aster Health 006SYNAUG001	Proposal → Negotiation	Pipeline → Best Case	—	—	+\$119,000
Dovetail Travel 006SYNAUG004	Proposal → Negotiation	Best Case → Commit	—	—	+\$168,000 <i>stage-date conflict</i>
Harborlight Mobility 006SYNAUG008	—	—	—	09-30 → 10-31	\$0 <i>close slipped 31d</i>
Junction Apparel 006SYNAUG010	Proposal → Negotiation	Pipeline → Best Case	—	—	+\$91,000 <i>stage-date conflict</i>
Lantern Beauty 006SYNAUG012	—	—	150k → 175k	—	+\$6,250 <i>stale since 06-20</i>

— = unchanged between snapshots

Remaining 11 deals: no change in stage, category, amount, or close date. Lantern Beauty's +\$25,000 amount increase has no recorded activity after 2026-06-20 and no explaining note (seller-notes.csv, 2026-06-20).

Two deals carry 46.9% of the weighted forecast, and every deal is over 60 days old

Hygiene per rules 4–6. Rule 8: none of these flags is proof that a deal will close or be lost.

CONCENTRATION (RULE 4)

46.9%

of weighted forecast in the two largest open deals



Top 2: \$624,000 Other 14: \$706,000

Inputs

Dovetail Travel 006SYNAUG004
\$420,000 × 100% (Commit) = \$420,000

Aster Health 006SYNAUG001
\$340,000 × 60% (Best Case) = \$204,000

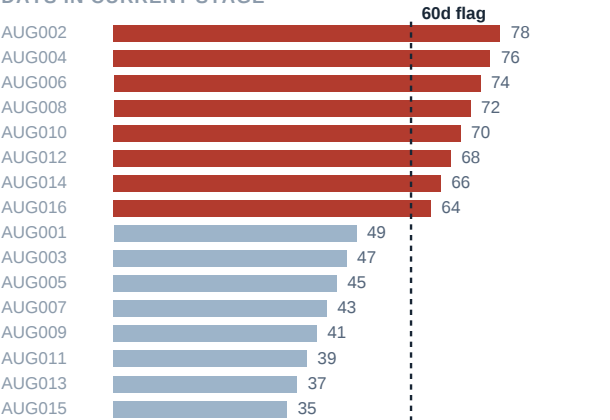
\$624,000 ÷ \$1,330,000 = 46.9%. Same two deals lead by raw amount and by weighted value.

AGING — FLAG AT ≥60 DAYS (RULE 6)

16 / 16 deals ≥60d since created

8 / 16 deals ≥60d in current stage

DAYS IN CURRENT STAGE



Bars: days since StageEnteredDate. Opp ages 96–196d (CreatedDate).
Dovetail & Junction stage dates are conflicted (p.4).

STALE — NO ACTIVITY IN >30 DAYS (RULE 5)

\$415,000

open value across 4 deals (15.2% of pipeline; \$124,750 weighted, 9.4%)

Deal	Last activity	Idle	Amount
Newbridge Education 006SYNAUG014	2026-06-05	76d	\$95k
Lantern Beauty 006SYNAUG012	2026-06-20	61d	\$175k
Elmstead Home 006SYNAUG005	2026-06-30	51d	\$60k
Brookline Media 006SYNAUG002	2026-07-03	48d	\$85k

Threshold: activity before 2026-07-21. Kingswell (006SYNAUG011, 2026-07-21) is exactly 30 days idle — not stale by rule 5. Elmstead is also 36 days past its 2026-07-15 close date yet remains Best Case.

Verify \$624,000 of concentrated value; re-qualify \$415,000 of stale pipeline

Watchlists reflect data flags and RevOps judgment. Per rule 8, no flag here predicts an outcome.

UPSIDE WATCH — LARGEST WEIGHTED VALUE AT PLAY

Dovetail Travel 006SYNAUG004

\$420,000 · Commit · closes 2026-09-30

Upgraded to Commit this period. Next step: complete procurement approval (note 2026-08-08). Carries the stage-date conflict — verify before relying on 100% weighting.

Aster Health 006SYNAUG001

\$340,000 · Best Case · closes 2026-11-30

Upgraded to Best Case; active 2026-08-10. Next step: confirm renewal scope with finance. Largest single weighted lift this period (+\$119,000).

Junction Apparel 006SYNAUG010

\$260,000 · Best Case · closes 2026-09-27

Upgraded to Best Case; active 2026-08-12; next step: confirm final approver. Stage-date conflict also applies — the +\$91,000 weighted gain is unverified.

Harborlight Mobility 006SYNAUG008

\$290,000 · Best Case · closes 2026-10-31

Third-largest deal, active 2026-08-05, but close date slipped 2026-09-30 → 10-31; next step: review the revised close plan.

DOWNSIDE WATCH — WHERE THE FORECAST IS SOFT

Unverified upgrades 006SYNAUG004 · 006SYNAUG010

up to −\$259,000 weighted if reversed

If Dovetail reverts to Best Case (−\$168,000) and Junction to Pipeline (−\$91,000), weighted forecast falls to \$1,071,000 (36.9% of target). Reversal is a scenario, not a prediction.

Elmstead Home 006SYNAUG005

\$60,000 · Best Case · close date passed 2026-07-15

36 days past close, idle 51 days; note (2026-06-30) asks whether the evaluation is still active. Best Case weighting looks unsupported until re-qualified.

Stale tail 006SYNAUG002 · 012 · 014

\$355,000 open · \$88,750 weighted

Brookline, Lantern, Newbridge idle 48–76 days. Lantern's amount rose +\$25,000 with no recorded activity — value increase is unexplained in the sources.

Concentration top 2 of 16 deals

46.9% of weighted forecast

A miss on either Dovetail or Aster removes up to \$420,000 / \$204,000 of weighted value with no single deal big enough to replace it.

Verify \$680,000 of upgrades, re-qualify \$415,000 of flagged deals, start generation

Owners shown are the deal owners recorded in current-pipeline.csv. Actions are RevOps recommendations — management judgment, not source data.

RECOMMENDED ACTIONS (JUDGMENT)

- 1

Verify the two upgraded deals before the forecast call

Casey Nguyen · Taylor Brooks

Reconcile Dovetail (006SYNAUG004) and Junction (006SYNAUG010) stage-entry dates and confirm Commit / Best Case status. \$680,000 of amount, \$259,000 of weighted gain at stake.
- 2

Re-qualify Elmstead Home or move it out of Best Case

Jordan Lee

006SYNAUG005: close date passed 2026-07-15, idle since 2026-06-30. Confirm whether the evaluation is active (seller note, 2026-06-30) and set a real close date.
- 3

Re-engage or downgrade the stale tail

Taylor Brooks · Casey Nguyen

Brookline (006SYNAUG002), Lantern (006SYNAUG012), Newbridge (006SYNAUG014): \$355,000 idle 48–76 days. For Lantern, document the basis of the +\$25,000 amount increase.
- 4

Start pipeline generation now — coverage is 0.94×

All owners · priority Morgan Patel

Even a 100% win rate leaves \$170,000 unfunded. Morgan Patel's book covers 0.57× of an \$850,000 target; no owner-level plan exists in the sources.
- 5

Build contingency behind the top two deals

Casey Nguyen · Jordan Lee

Dovetail + Aster hold 46.9% of weighted value. Identify next-best coverage before either deal's close date (2026-09-30 / 2026-11-30).

UNRESOLVED DATA PROBLEMS (HYGIENE — NOT JUDGMENT)

- Backwards stage dates**
006SYNAUG004 StageEnteredDate 2026-06-12 → 2026-06-05; 006SYNAUG010 2026-06-24 → 2026-06-11, while both stages advanced. Prior and current snapshots contradict each other; stage aging for these deals is unreliable.
- Past-due open deal**
006SYNAUG005 close date 2026-07-15 precedes the 2026-08-20 snapshot but the deal is open in Best Case.
- Unexplained amount change**
006SYNAUG012 amount \$150,000 → \$175,000 with LastActivityDate unchanged at 2026-06-20 and no covering note in seller-notes.csv.
- Target period undefined**
targets.csv states owner targets for 2026-08-20 only — no period (quarter/year) and no prior-snapshot targets. Prior coverage (0.93×) uses the current denominator.
- Notes mirror NextStep**
Every seller-notes.csv entry duplicates the pipeline NextStep text — no independent seller commentary exists.

Every figure traces to five files; the gaps below bound what it can support

SOURCES USED (ALL IN SOURCE-PACK/AUGUST-PIPELINE/)

current-pipeline.csv

16 opportunity rows, snapshot 2026-08-20. Amounts, stages, categories, dates, owners, next steps.

prior-pipeline.csv

16 rows, snapshot 2026-07-18. Baseline for all movement comparisons (matched on OpportunityId).

targets.csv

4 owner targets dated 2026-08-20, totalling \$2,900,000.

seller-notes.csv

16 notes with dates; text duplicates the NextStep field.

forecast-rules.md

Calculation rules 1–8 applied exactly as written; snapshot date 2026-08-20.

All data is labelled synthetic — fictional companies.

MISSING INFORMATION

- Target period: targets.csv gives no quarter or fiscal year, and no company-level target beyond the sum of owner targets.
- No prior-snapshot targets, so prior coverage reuses the 2026-08-20 denominator.
- No Closed Won / Closed Lost rows, so attainment-to-date and win-rate history cannot be computed.
- No explanation for the two backwards StageEnteredDate values or Lantern Beauty's +\$25,000 amount change.
- No currency field; amounts are assumed to share one unit.
- No independent seller commentary beyond next-step text.

LIMITATIONS OF THIS ANALYSIS

- Two snapshots only (2026-07-18, 2026-08-20): no trend beyond one period of movement.
- Weighted forecast uses the fixed category weights in rule 2 (25/60/100%), not deal-level probabilities.
- Concentration follows rule 4 exactly: the two largest open deals' share of weighted forecast.
- Rule 8 applies throughout: staleness, slippage, and concentration are flags, never proof a deal will close or be lost.
- Watchlists and actions on pages 6–7 are analyst judgment layered on the data flags; everything else is calculated from sources.