

Pipeline Health & Forecast

Revenue Leaders Dashboard

\$1,330,000 **0.94x**
Weighted Forecast Coverage Ratio

\$+384,250
vs. Prior Snapshot

As of August 20, 2026

Forecast trending up with strong momentum in Negotiation stage

- Weighted forecast increased 40% month-over-month

\$945,750 → \$1,330,000 (+\$384,250)

- Three major deals advanced to Commit/BestCase

Dovetail Travel (+168K), Aster Health (+119K), Junction Apparel (+91K)

- Coverage at 0.94x requires close focus on lower-quota owners

Taylor Brooks and Morgan Patel below 0.85x; Casey Nguyen at 1.42x

Implication: Pipeline health is solid. Upside drivers are strong and recent, but watch for stale deals and stage aging in Proposal.

Open pipeline 2.73M covers 94% of 2.9M target—gap widens for two reps

Owner	Target	Open Pipeline	Coverage	Forecast	Gap
Jordan Lee	\$700,000	\$715,000	1.02x	\$318,750	\$-15,000
Taylor Brooks	\$650,000	\$535,000	0.82x	\$224,750	\$+115,000
Morgan Patel	\$850,000	\$485,000	0.57x	\$121,250	\$+365,000
Casey Nguyen	\$700,000	\$995,000	1.42x	\$665,250	\$-295,000
TOTAL	\$2,900,000	\$2,730,000	0.94x	\$1,330,000	\$-170,000

Action: Morgan Patel (0.57x) and Taylor Brooks (0.82x) require pipeline accelerators or scope expansion. Jordan Lee and Casey Nguyen are on pace.

Four deals advanced; 384K net upside in 33 days

Major Movements (Current vs. Prior, 2026-07-18):

Opportunity ID	Account	Movement	Prior Weighted	Current Weighted	Impact
006SYNAUG004	Dovetail Travel	BestCase to Commit	\$252,000	\$420,000	+\$168,000
006SYNAUG001	Aster Health	Pipeline to BestCase	\$85,000	\$204,000	+\$119,000
006SYNAUG010	Junction Apparel	Pipeline to BestCase	\$65,000	\$156,000	+\$91,000

All movements driven by forecast-category advancement (Pipeline to BestCase, BestCase to Commit) and stage progression. Current-pipeline metrics stable; no revenue recognized.

Overall Changes:

Metric	Prior (07-18)	Current (08-20)	Change	Source
Open Pipeline	\$2,705,000	\$2,730,000	+\$25,000	current-pipeline.csv
Weighted Forecast	\$945,750	\$1,330,000	+\$384,250	current-pipeline.csv + forecast-rules.md
Coverage Ratio	0.93x	0.94x	+0.01x	targets.csv

Pipeline health exposures: concentration high, aging across all stages, stale deals emerging

Concentration (Rule 4)

46.9%

of weighted forecast in top 2 opportunities

Dovetail Travel (Commit, 420K) and Aster Health (BestCase, 204K weighted) drive nearly half of forecast. Threshold: less than 40 percent. Monitor risk.

Opportunity Aging (Rule 6)

16 of 16

opportunities 60+ days old

All open deals created before June 20. Oldest: Dovetail Travel (196d, created 2026-02-05). No immediate flags, but watch for movement slowdown.

Stale Opportunities (Rule 5)

4 deals / \$415,000

no activity greater than 30 days

Lantern Beauty (61d), Newbridge Education (76d), Elmstead Home (51d), Brookline Media (48d). Earliest note: Lantern Beauty, 2026-06-20.

Stage Aging (Rule 6): 8 deals in Proposal or Negotiation aged 60+ days (entered stage 2026-06-03 to 2026-06-17). Proposal stage typically 30 to 45 days; escalate if commercial blockers.

Upside concentrated in three deals; no downside movement

Upside (Weighted Value Increased):

- 1. Dovetail Travel** — 006SYNAUG004 Stage: Proposal to Negotiation | Category: BestCase to Commit Prior Weighted: 252K to Current: 420K | **+168K** (67 percent increase)
Owner: Casey Nguyen | Close: 2026-09-30 | Note: Complete procurement approval
- 2. Aster Health** — 006SYNAUG001 Stage: Proposal to Negotiation | Category: Pipeline to BestCase Prior Weighted: 85K to Current: 204K | **+119K** (140 percent increase)
Owner: Jordan Lee | Close: 2026-11-30 | Note: Confirm renewal scope with finance
- 3. Junction Apparel** — 006SYNAUG010 Stage: Proposal to Negotiation | Category: Pipeline to BestCase Prior Weighted: 65K to Current: 156K | **+91K** (140 percent increase)
Owner: Taylor Brooks | Close: 2026-09-27 | Note: Confirm final approver

Downside (Weighted Value Decreased):

No deals decreased in weighted value from prior snapshot (2026-07-18). One deal increased in amount (Lantern Beauty: 150K to 175K, +25K raw; weighted +6.25K).

Implication for Forecast Stability: Upside is recent and concentrated in Q3 close dates. No downside hedges pipeline. Watch for slippage in these three deals; they account for 378K of 384K net upside since prior snapshot.

Four reps own 16 deals; data quality stable; unresolved delays in Proposal stage

Management Actions:

Casey Nguyen (Strongest Coverage, 1.42x) Own: Dovetail Travel (Commit, 420K, close 2026-09-30) — track procurement approval Opportunity: upside in Lantern Beauty (175K) and Harborlight Mobility (290K BestCase) **Jordan Lee (On Target, 1.02x)** Own: Aster Health (BestCase, 204K weighted, closes 2026-11-30) — upside driver Risk: Elmstead Home (51d stale, BestCase, 60K) — reconfirm evaluation status Opportunity: Cobalt Labs (120K, Discovery, 2026-12-31) and Ironwood Foods (185K, Discovery, 2027-03-31) **Taylor Brooks (Below Target, 0.82x)** Risk: Two stale deals (Brookline Media 48d, Newbridge Education 76d) totaling 180K Opportunity: Junction Apparel momentum (BestCase, 156K weighted, closes 2026-09-27) Action: Accelerate Fortis Bank (Proposal, 74d in stage, 95K) security review **Morgan Patel (Weakest Coverage, 0.57x)** Action: Strongest upside lever—Mossland Outdoor (Discovery, 130K), Kingswell Hospitality (Discovery, 140K) Risk: Goodtrail Pets (150K, Discovery, 2027-01-14) is long-dated; engagement unknown

Data Quality: No missing fields (ID, account, stage, category, amount, close date, owner, activity). Seller notes current (most recent: 2026-08-12, Confirm final approver). Targets stable by owner. No contradictions between prior and current snapshots except expected category and stage movements.

Data sources, quality notes, and next steps for revenue leaders

Data Sources and Citations:

current-pipeline.csv (Snapshot: 2026-08-20) 16 open opportunities. Open pipeline: 2,730,000. Weighted forecast: 1,330,000. Columns: OpportunityId, Amount, StageName, ForecastCategoryName, CloseDate, CreatedDate, StageEnteredDate, LastActivityDate, OwnerName. **prior-pipeline.csv** (Snapshot: 2026-07-18) 16 same opportunities. Open pipeline: 2,705,000. Weighted forecast: 945,750. **targets.csv** (Snapshot: 2026-08-20) Four owners with assigned targets: Jordan Lee 700K, Taylor Brooks 650K, Morgan Patel 850K, Casey Nguyen 700K. Total: 2,900K. **forecast-rules.md** Applied Rules 1 through 7: open pipeline, weighted forecast (Pipeline 25 percent, BestCase 60 percent, Commit 100 percent), coverage, concentration, stale (greater than 30 days), aging (60+ days). **seller-notes.csv** Last updated 2026-08-12 (most recent). No material changes post-snapshot date.

Limitations and Open Questions:

Concentration Risk (46.9 percent) — Dovetail Travel and Aster Health represent no downside mitigation. If either slips, forecast falls 378K (28 percent reduction). Prior note: complete procurement approval and confirm renewal scope are tactical, not strategic blockers; current probability of close unknown. **Stale Activity** — Four deals (415K) show no activity greater than 30 days. Not proof of lost deals; may indicate evaluation delays on buyer side. **Aging in Proposal Stage** — Seven deals in Proposal stage; eight total (across Proposal and Negotiation) aged 60+ days in current stage. Timeline expectation (e.g., SLA for Proposal exit) not provided; cannot assess abnormality. **Low Confidence in Discovery Stage** — Six opportunities (35 percent of pipeline) weighted at 25 percent carry material forecast uncertainty. No forecast-category rationale (e.g., why Cobalt Labs is Pipeline vs. BestCase) supplied; weights applied mechanically. **No Deal-Level Risk Scores** — Seller notes are tactical (e.g., confirm approver); strategic risk (e.g., budget, champion engagement, competitive threat) not captured.

Next Steps: Verify Dovetail Travel and Aster Health close plans (procurement, finance scope). Reactivate four stale deals or move to Closed Lost. Assess Morgan Patel and Taylor Brooks pipeline acceleration options.