

August pipeline health and forecast

SNAPSHOT DATE

2026-08-20

PRIOR SNAPSHOT

2026-07-18 (33 days earlier)

SCOPE

16 open opportunities · 4 owners

PREPARED FOR

Revenue leadership decision forum

Built only from source-pack/august-pipeline/ —
current-pipeline.csv, prior-pipeline.csv, targets.csv,
seller-notes.csv, forecast-rules.md

THE CALL

The forecast covers 46% of target, and this month's gain came from re-rating three deals — not from new pipeline.

Weighted forecast of 1,330,000 against a combined owner target of 2,900,000. Open pipeline is smaller than the target it must cover.

INSIDE

- 02 The call, and the three readings behind it
- 03–06 Target, movement, concentration and exposure
- 07–08 Actions, data conflicts, sources and limits

WEIGHTED FORECAST	COVERAGE	GAP TO TARGET	TOP-2 CONCENTRATION
1,330,000	0.94x	– 1,570,000	46.9%
45.9% of target	open ÷ target	weighted basis	of weighted forecast

Figures calculated from forecast-rules.md rules 1–4. Inputs shown on pages 3–5.

SYNTHETIC DATA — fictional companies. No real customer data.

Amounts and targets are unit-less in the source files; currency is not stated in any column header (current-pipeline.csv, targets.csv). Values are shown as supplied.

Call the period 1,570,000 short — and treat the month's gain as re-rating, not progress

Three independent readings of the same snapshot point the same way: not enough pipeline, no new pipeline, and confidence packed into a handful of aging records.

WEIGHTED FORECAST	COMBINED TARGET	ATTAINMENT	GAP TO TARGET	COVERAGE
1,330,000	2,900,000	45.9%	- 1,570,000	0.94x
rule 2 weights applied	4 owner targets, targets.csv	1,330,000 ÷ 2,900,000	1,330,000 - 2,900,000	2,730,000 ÷ 2,900,000

01

There is not enough pipeline to reach target, at any win rate

Open pipeline 2,730,000 against a 2,900,000 target is 0.94x coverage. Closing every one of the 16 open opportunities at full value still finishes 170,000 short.

current-pipeline.csv (16 rows, none Closed Won/Lost) · targets.csv 2026-08-20

02

The forecast rose without any new pipeline being created

Weighted forecast moved +384,250 since 2026-07-18. 378,000 of that (98.4%) is three forecast-category upgrades at unchanged Amount. Open pipeline moved +25,000.

006SYNAUG001, 006SYNAUG004, 006SYNAUG010 · current- vs prior-pipeline.csv

03

What remains is concentrated, aging, and partly unverifiable

46.9% of the weighted forecast sits in two opportunities. 8 of 16 records have held the same stage for 60 days or more; 4 are stale under rule 5.

006SYNAUG004 + 006SYNAUG001 · rules 4-6 applied to current-pipeline.csv

IMPLICATION FOR THIS MEETING

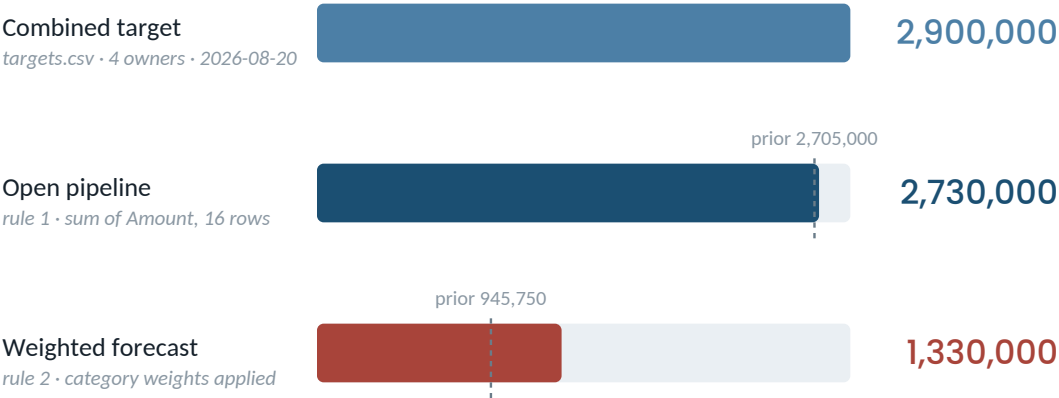
Plan against 1,330,000, hold the 624,000 top-two block under weekly inspection, and close six record conflicts.

The data does not support raising the number; it also does not prove any single deal is lost. Actions on page 7.

Coverage of 0.94x means the pipeline is smaller than the target it has to cover

Rule 3 divides open pipeline by target; rule 2 weights convert the same book into the forecast number. Both are shown against the same 2,900,000 denominator.

OPEN PIPELINE, WEIGHTED FORECAST AND TARGET



INPUTS

Coverage (rule 3) = 2,730,000 ÷ 2,900,000 = 0.94x
Weighted (rule 2) = (1,360,000 × 25%) + (950,000 × 60%) + (420,000 × 100%)
Target = 700,000 + 650,000 + 850,000 + 700,000 (targets.csv, 4 rows)

FORECAST CATEGORY MIX — CURRENT VS PRIOR

CATEGORY	WEIGHT	RECORDS	AMOUNT	WEIGHTED	PRIOR WEIGHTED
Commit	100%	1	420,000	420,000	0
BestCase	60%	4	950,000	570,000	462,000
Pipeline	25%	11	1,360,000	340,000	483,750
Total open	—	16	2,730,000	1,330,000	945,750

Commit was empty at the prior snapshot; 006SYNAUG004 alone now carries 420,000, 31.6% of the forecast.
current-pipeline.csv / prior-pipeline.csv · weights per forecast-rules.md rule 2

COVERAGE BY OWNER (RULE 3)

OWNER	TARGET	OPEN	COVERAGE	WEIGHTED
Jordan Lee OWN-A01	700,000	715,000	1.02x	318,750 46% of target
Taylor Brooks OWN-A02	650,000	535,000	0.82x	224,750 35% of target
Morgan Patel OWN-A03	850,000	485,000	0.57x	121,250 14% of target
Casey Nguyen OWN-A04	700,000	995,000	1.42x	665,250 95% of target

Bar scale 0–1.5x; mark = 1.00x. Only OWN-A01 and OWN-A04 reach 1.00x (targets.csv, current-pipeline.csv, 2026-08-20).

The forecast gained 384,250 without a single new opportunity entering the book

The same 16 Opportunity IDs appear in both snapshots — none added, none removed, none closed won or lost. Each measure in rule 7 is shown separately below.

WHAT THE CURRENT WEIGHTED FORECAST OF 1,330,000 IS MADE OF



98.4% of the +384,250 gain is re-categorisation of deals already in the book — open pipeline moved only +25,000 (+0.9%), from 2,705,000 to 2,730,000.

Two record-integrity conflicts sit inside this movement: stage-entry dates that precede the prior snapshot, and two that moved backwards. See D2 and D3 on page 7.

RECORD-LEVEL MOVEMENT — STAGE, CATEGORY, AMOUNT, CLOSE DATE AND WEIGHTED VALUE SHOWN SEPARATELY (RULE 7)

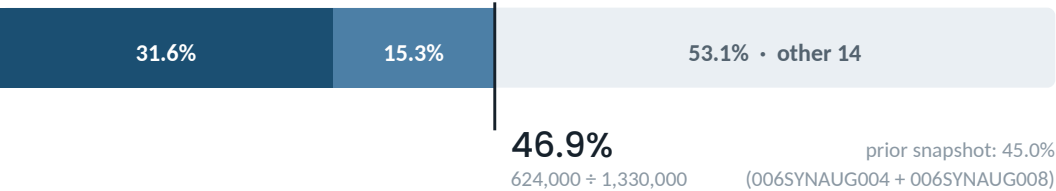
OPPORTUNITY ID	ACCOUNT	STAGE	CATEGORY	AMOUNT	CLOSE DATE	WEIGHTED VALUE
006SYNAUG001	Aster Health	Proposal → Negotiation	Pipeline → BestCase	340,000 —	2026-11-30 —	85,000 → 204,000
006SYNAUG004	Dovetail Travel	Proposal → Negotiation	BestCase → Commit	420,000 —	2026-09-30 —	252,000 → 420,000
006SYNAUG010	Junction Apparel	Proposal → Negotiation	Pipeline → BestCase	260,000 —	2026-09-27 —	65,000 → 156,000
006SYNAUG012	Lantern Beauty	Proposal —	Pipeline —	150,000 → 175,000	2026-10-15 —	37,500 → 43,750
006SYNAUG008	Harborlight Mobility	Proposal —	BestCase —	290,000 —	2026-09-30 → 2026-10-31	174,000 —
Other 11 records	—	no change	no change	no change	no change	no change

An em dash means the value is identical in both snapshots. Source: current-pipeline.csv vs prior-pipeline.csv, matched on Opportunity ID (rule 7). 006SYNAUG008 slipped 31 days with no other field changing.

Two deals carry 47% of the forecast, and two thirds of it sits in records parked 60+ days in stage

Record-state measures from rules 4–6. Rule 8 applies to all of them: none is evidence that a deal will close or be lost.

CONCENTRATION OF WEIGHTED FORECAST (RULE 4)



Dovetail Travel420,000
006SYNAUG004 • Negotiation • Commit • amount 420,000
close 2026-09-30 • owner Casey Nguyen • 76d in stage
weighted • 31.6% of forecast

Aster Health204,000
006SYNAUG001 • Negotiation • BestCase • amount 340,000
close 2026-11-30 • owner Jordan Lee • 49d in stage
weighted • 15.3% of forecast

Cumulative weighted share: top 1 = 31.6% • top 2 = 46.9% • top 3 = 60.0% • top 4 = 71.7%

Rule 4 does not define “largest” as amount or weighted value; both readings pick the same pair, so 46.9% holds either way.

AGING AND STALENESS (RULES 5–6)

Stale — last activity more than 30 days before 2026-08-204 of 16

415,000 open • 124,750 weighted • 9.4% of forecast

006SYNAUG014 76d • 006SYNAUG012 61d • 006SYNAUG005 51d • 006SYNAUG002 48d

Stage age 60 days or more (StageEnteredDate)8 of 16

1,530,000 open • 890,000 weighted • 66.9% of forecast

Longest: 006SYNAUG002 78d • 006SYNAUG004 76d • 006SYNAUG006 74d • 006SYNAUG008 72d

Opportunity age 60 days or more (CreatedDate)16 of 16

2,730,000 open • 1,330,000 weighted • 100% of forecast

Range 96–196 days. The measure flags the whole book, so it does not discriminate here.

Boundary: 006SYNAUG011 last activity 2026-07-21 is exactly 30 days old, so rule 5’s “more than 30 days” test does not flag it. Staleness cannot be compared with the prior snapshot — see D1, page 7.

Rule 8: stale data, slippage and concentration describe the state of the record. They are not treated here as proof that a deal will close or be lost.

Four records hold 72% of the downside; the upside is 1,400,000 that the weights do not count

Both sides are arithmetic from rules 1-2, not predictions. Neither snapshot contains a Closed Won or Closed Lost row, so no win rate can be evidenced from this pack.

DOWNSIDE — WEIGHTED VALUE ALREADY IN THE NUMBER

If a record does not close, this weighted value leaves the forecast.

OPPORTUNITY ID	ACCOUNT	CATEGORY	WEIGHTED	SHARE	CLOSE DATE
006SYNAUG004	Dovetail Travel	Commit	420,000	31.6%	2026-09-30
006SYNAUG001	Aster Health	BestCase	204,000	15.3%	2026-11-30
006SYNAUG008	Harborlight Mobility	BestCase	174,000	13.1%	2026-10-31
006SYNAUG010	Junction Apparel	BestCase	156,000	11.7%	2026-09-27
Top 4 combined			954,000	71.7%	

RECORD-STATE FLAGS ON THOSE FOUR (RULES 5-6)

006SYNAUG004	76d in stage	only Commit record	stage-entry conflict
006SYNAUG001	49d in stage	upgraded this month	
006SYNAUG008	72d in stage	close date +31 days	
006SYNAUG010	70d in stage	upgraded this month	stage-entry conflict

None of the four is stale; last activity is 8-15 days old (current-pipeline.csv).
"Upgraded this month" = forecast category raised since 2026-07-18 (page 4).

Neither side of this page forecasts an individual deal. The rule-2 weights are fixed by the rules file and were not validated against outcomes, because no closed opportunities exist in either snapshot. Concentration and aging are reported as record state only (rule 8).

UPSIDE HEADROOM — AMOUNT THE RULE-2 WEIGHTS DO NOT COUNT

Amount minus weighted value. Mechanical arithmetic, not a probability.

1,400,000

2,730,000 open - 1,330,000 weighted
Converting all of it still finishes 170,000 below target.

OPPORTUNITY ID	ACCOUNT	CATEGORY	AMOUNT	WEIGHTED	HEADROOM
006SYNAUG009	Ironwood Foods	Pipeline	185,000	46,250	138,750
006SYNAUG001	Aster Health	BestCase	340,000	204,000	136,000
006SYNAUG012	Lantern Beauty	Pipeline	175,000	43,750	131,250
006SYNAUG008	Harborlight Mobility	BestCase	290,000	174,000	116,000
006SYNAUG007	Goodtrail Pets	Pipeline	150,000	37,500	112,500

current-pipeline.csv · headroom = Amount - (Amount × rule-2 weight). Full-book headroom 1,400,000.

Two of those five carry hygiene flags
006SYNAUG012 is 61 days stale, yet its Amount rose 150,000 → 175,000 with no activity since 2026-06-20.
006SYNAUG009 carries a close date of 2027-03-31, outside any near-term period.

Six record conflicts must be closed before this number can be moved in either direction

Actions are analyst recommendations. Owners named are the record owners supplied in current-pipeline.csv — no accountability, date or commitment has been assigned or invented.

RECOMMENDED ACTIONS — ANALYST JUDGMENT, KEPT SEPARATE FROM THE DATA

#	ACTION	RECORDS	RECORD OWNER (AS SUPPLIED)
1	Re-verify the three forecast-category upgrades that created 378,000 of forecast <i>Missing: no approval trail or stage-change audit in the pack</i>	006SYNAUG001 006SYNAUG004 006SYNAUG010	Jordan Lee (OWN-A01) Casey Nguyen (OWN-A04) Taylor Brooks (OWN-A02)
2	Inspect the single Commit record carrying 31.6% of the forecast <i>Missing: no close plan or probability field is supplied</i>	006SYNAUG004	Casey Nguyen (OWN-A04)
3	Resolve the record whose close date passed 36 days ago and is still weighted at 36,000 <i>Missing: no reason code for the passed close date</i>	006SYNAUG005	Jordan Lee (OWN-A01)
4	Reconcile the four stale records (415,000 open, 124,750 weighted) <i>Missing: no activity history beyond LastActivityDate</i>	006SYNAUG002, 005, 012, 014	Jordan Lee (OWN-A01) Taylor Brooks (OWN-A02, ×2) Casey Nguyen (OWN-A04)
5	Decide how the 170,000 coverage shortfall is sourced, or re-set the target <i>Missing: no pipeline-generation or conversion data in the pack</i>	Whole book vs targets.csv	Not stated in the source pack
6	Refer the snapshot-integrity faults to the owner of the CRM extract <i>Missing: no data steward is named in any supplied file</i>	Prior snapshot file 006SYNAUG004 / 010	Not stated in the source pack

Record IDs and owner names read from current-pipeline.csv (snapshot 2026-08-20). Nothing in the source pack records these actions as agreed.

Source: source-pack/august-pipeline/current-pipeline.csv, prior-pipeline.csv, targets.csv

UNRESOLVED DATA PROBLEMS

- D1

prior-pipeline.csv is dated 2026-07-18 but carries LastActivityDate values up to 2026-08-12 on 12 of its 16 rows — later than its own snapshot date. Activity cannot be compared between the two snapshots.
- D2

006SYNAUG004 and 006SYNAUG010: StageEnteredDate moved backwards (−7 and −13 days) while the stage advanced.
- D3

All three stage advances carry a StageEnteredDate earlier than the 2026-07-18 file that still showed the prior stage.
- D4

006SYNAUG005: CloseDate 2026-07-15 is 36 days past the snapshot, still open, still weighted at 36,000.
- D5

006SYNAUG012: Amount raised 150,000 → 175,000 with no recorded activity since 2026-06-20 (61 days).
- D6

006SYNAUG011: last activity is exactly 30 days old, so it sits on the rule-5 boundary and is not flagged.

Everything above comes from five files — and six things this pack does not contain

No other source was consulted, and no figure has been carried in from outside source-pack/august-pipeline/.

SOURCES USED

current-pipeline.csv

16 rows · SnapshotDate 2026-08-20 · every row open, no Closed Won or Closed Lost. Basis for open pipeline, weighted forecast, aging, staleness and concentration.

prior-pipeline.csv

16 rows · SnapshotDate 2026-07-18 · the same 16 Opportunity IDs. Basis for movement; its activity dates are unusable (D1, page 7).

targets.csv

4 rows · SnapshotDate 2026-08-20 · 700,000 / 650,000 / 850,000 / 700,000 = 2,900,000.

forecast-rules.md

Rules 1–8 · snapshot date 2026-08-20. Weights, coverage, concentration, staleness, aging and the comparison method are all taken from this file.

seller-notes.csv

16 rows · note dates 2026-06-05 to 2026-08-12. Duplicates NextStep, LastActivityDate and OwnerId exactly for all 16 records, so it adds no independent evidence.

MISSING INFORMATION

Target period is not defined

targets.csv carries a SnapshotDate but no period start or end. Close dates span 2026-07-15 to 2027-03-31 across three quarters, so coverage compares an all-dates pipeline with an undated target.

No prior target

targets.csv holds 2026-08-20 rows only. The 0.93x prior coverage quoted for reference uses the current target, so it is not like-for-like.

No currency or unit

No column header in any file states a unit. Values are reproduced as supplied.

No observed win rate

Neither snapshot contains a Closed Won or Closed Lost row, so the rule-2 weights cannot be tested against outcomes.

No team or company target

2,900,000 is the sum of four owner rows; no roll-up target is given.

No owner for the data faults

No data steward, approval trail or stage-change audit exists in the pack.

LIMITATIONS AND RULE NOTES

Rule 4 is ambiguous, without effect

“Two largest” is not defined as by amount or by weighted value. Both readings select 006SYNAUG004 and 006SYNAUG001, so 46.9% holds either way.

Rule 6 does not discriminate

Opportunity age flags all 16 records (96–196 days). Only stage age separates the book, and on two records it rests on a conflicting date (D2).

Rule 5 boundary

“More than 30 days” excludes 006SYNAUG011 at exactly 30 days. A “30 or more” reading would give 5 stale records and 555,000 open.

Weights are given, not derived

25 / 60 / 100% come from rule 2 and are applied as written. They are not probabilities measured from this data.

Rule 8 observed throughout

Stale data, slippage and concentration are reported as record state. No deal in this deck is described as likely to close or to be lost.

Movement is snapshot-to-snapshot

Any change between 2026-07-18 and 2026-08-20 that was reversed before the second snapshot is invisible here.

OPEN QUESTIONS FOR THE NEXT SNAPSHOT

Q1 What period do the four owner targets cover? Close dates run to 2027-03-31.

Q2 Who owns the CRM extract, and why do prior-snapshot activity dates post-date it?

Q3 Should rule 5 read “more than 30 days” or “30 days or more”? One record turns on it.