

PIPELINE HEALTH & FORECAST

August snapshot review for revenue leadership

SNAPSHOT DATE

2026-08-20

Prepared from source-pack/august-pipeline · synthetic data

WHAT THIS DECK ANSWERS

Where is the forecast exposed, and what should revenue leaders act on before the next snapshot?

OPEN PIPELINE VS. TARGET

\$2.73M · coverage 0.94x

WEIGHTED FORECAST VS. TARGET

\$1.33M · 46% of target

OPPORTUNITIES IN VIEW

16 open opportunities · 4 owners

COMPARISON WINDOW

2026-07-18 → 2026-08-20 (one prior snapshot)

Sources: current-pipeline.csv, prior-pipeline.csv, targets.csv,
seller-notes.csv, forecast-rules.md — source-pack/august-pipeline/

SYNTHETIC DATA — fictional companies, no real customer data

The forecast is short even in the best case

Open pipeline covers 94% of target; risk-weighted forecast covers 46%. Closing every open dollar still misses target — and the weighted view misses by far more.

OPEN PIPELINE VS. TARGET

\$2.73M of \$2.90M

coverage 0.94x — current-pipeline.csv, targets.csv

GAP AT 100% CONVERSION

\$170K short

\$2.90M target – \$2.73M open pipeline

WEIGHTED FORECAST VS. TARGET

\$1.33M (46%)

weighted per forecast-rules.md rule 2; gap \$1.57M

WEIGHTED FORECAST SINCE JUL 18

+\$384K

\$0.95M → \$1.33M; category mix, not new pipeline

WHY THIS IS THE CALL — FOUR DISTINCT REASONS

- 1

Coverage sits below 1x.

Even 100% conversion of open pipeline (\$2.73M) misses the \$2.90M target by \$170K.

current-pipeline.csv; targets.csv
- 2

Category mix is Pipeline-heavy.

50% of open dollars (\$1,360K of \$2.73M) sit in the 25%-weight Pipeline category, holding weighted forecast to 46% of target.

current-pipeline.csv; forecast-rules.md rule 2
- 3

The forecast is concentrated.

The two largest open opportunities — Dovetail Travel (006SYNAUG004, \$420K) and Aster Health (006SYNAUG001, \$340K) — hold 46.9% of weighted forecast.

current-pipeline.csv; forecast-rules.md rule 4
- 4

Coverage is uneven and hygiene is mixed.

Morgan Patel's book covers 0.57x target vs. Casey Nguyen's 1.42x; 4 of 16 open opportunities (25%) show no activity in 30+ days.

current-pipeline.csv; targets.csv

Coverage is 0.94x on paper — and thinner once forecast weights apply

Open pipeline and weighted forecast, current vs. prior snapshot, against combined owner target.

COVERAGE CALCULATION — RULE 3

Open pipeline (numerator)
\$2.73M

÷ Target (denominator)
\$2.90M

= Coverage

0.94x

WEIGHTED FORECAST — RULE 2 (BY CATEGORY)

Category	Weight	Open \$	Weighted \$	
Pipeline	25%	\$1,360K	\$340K	
BestCase	60%	\$950K	\$570K	
Commit	100%	\$420K	\$420K	Casey Nguyen
Total	—	\$2.73M	\$1.33M	Jordan Lee

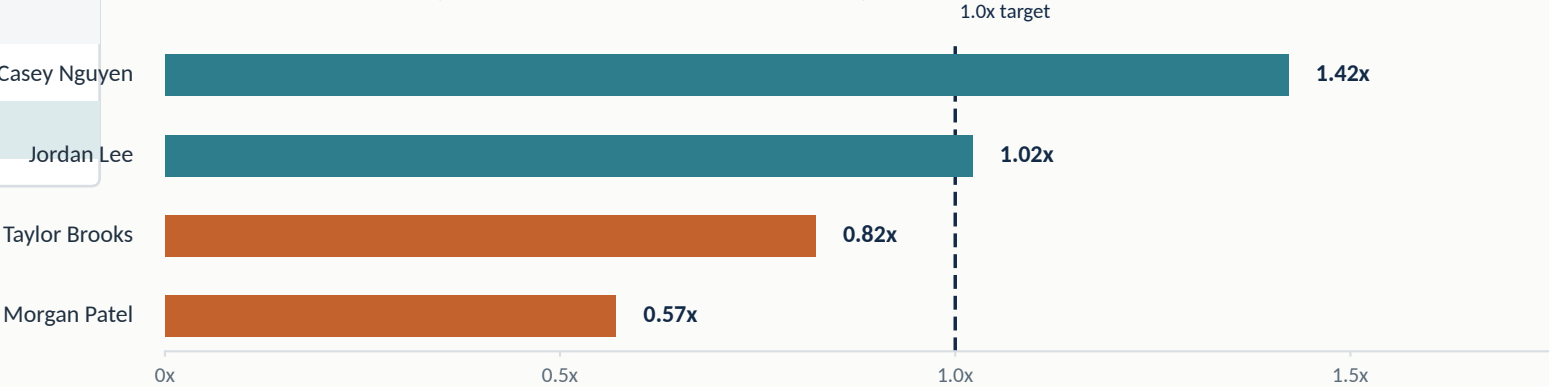
Weighted forecast is 46% of the \$2.90M target — a \$1.57M gap.

CURRENT VS. PRIOR SNAPSHOT (TOTALS)

	Prior (Jul 18)	Current (Aug 20)	Change
Open pipeline	\$2.71M	\$2.73M	+ \$25K
Weighted forecast	\$0.95M	\$1.33M	+ \$384K

16 open opportunities in both snapshots (no Closed Won/Lost rows present).

COVERAGE BY OWNER (CURRENT, OPEN PIPELINE ÷ TARGET)



The forecast gained \$384K — almost entirely from category upgrades, not new pipeline

Comparing 2026-07-18 to 2026-08-20 by Opportunity ID. Stage, category, amount, close date, and weighted value are shown separately (forecast-rules.md rule 7).

OPPORTUNITIES WITH ANY CHANGE

5 of 16

31% of the book; 11 unchanged on every field

STAGE ADVANCED

3 opportunities

Proposal → Negotiation

FORECAST CATEGORY UPGRADED

3 opportunities

2 Pipeline→BestCase, 1 BestCase→Commit

WEIGHTED FORECAST CHANGE

+\$384K

see per-opportunity detail below

OPPORTUNITIES WITH A TRACKED CHANGE (OF 16 TOTAL)

Opportunity	Stage: prior → current	Category: prior → current	Amount: prior → current	Close date: prior → current	Weighted Δ
Dovetail Travel 006SYNAUG004	Proposal → Negotiation	BestCase → Commit	\$420K (no change)	Sep 30, 2026 (no change)	+\$168K
Aster Health 006SYNAUG001	Proposal → Negotiation	Pipeline → BestCase	\$340K (no change)	Nov 30, 2026 (no change)	+\$119K
Junction Apparel 006SYNAUG010	Proposal → Negotiation	Pipeline → BestCase	\$260K (no change)	Sep 27, 2026 (no change)	+\$91K
Lantern Beauty 006SYNAUG012	Proposal (no change)	Pipeline (no change)	\$150K → \$175K	Oct 15, 2026 (no change)	+\$6K
Harborlight Mobility 006SYNAUG008	Proposal (no change)	BestCase (no change)	\$290K (no change)	Sep 30 → Oct 31, 2026	no change

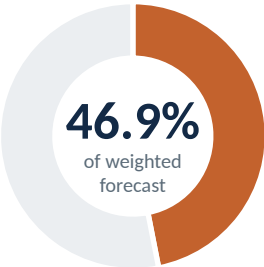
Harborlight Mobility's close date moved from Sep 30 to Oct 31 with stage and category unchanged — shown as movement, not scored as risk (see page 6).

Half the open book has sat in its current stage 60+ days, and a quarter has gone quiet

Owner-level coverage is on page 3 (0.94x overall). This page cuts the same 16 open opportunities by concentration, time-in-stage, and recent activity.

CONCENTRATION — RULE 4

Share of weighted forecast held by the two largest open deals



- Dovetail Travel • 006SYNAUG004**
\$420K open → \$420K weighted
- Aster Health • 006SYNAUG001**
\$340K open → \$204K weighted

Remaining 14 opportunities
53.1% of weighted forecast (\$706K)

Two largest by deal Amount, current-pipeline.csv.

AGING — RULE 6 (FLAG ≥ 60 DAYS)

Opportunity age ≥ 60 days (CreateDate)



Flags all 16 open opportunities — not discriminating this snapshot.

Stage age ≥ 60 days (StageEnteredDate)



The more useful cut this snapshot — 8 opportunities below.

Opportunities with stage age ≥ 60 days

Brookline Media 78 days in stage	Dovetail Travel 76 days in stage
Fortis Bank 74 days in stage	Harborlight Mobility 72 days in stage
Junction Apparel 70 days in stage	Lantern Beauty 68 days in stage
Newbridge Education 66 days in stage	Pinecrest Telecom 64 days in stage

STALE — RULE 5 (> 30 DAYS QUIET)

4 of 16 open opportunities (25%) have had no logged activity in over 30 days.

Newbridge Education 006SYNAUG014 • Taylor Brooks Last activity Jun 5, 2026	76 days quiet
Lantern Beauty 006SYNAUG012 • Casey Nguyen Last activity Jun 20, 2026	61 days quiet
Elmstead Home 006SYNAUG005 • Jordan Lee Last activity Jun 30, 2026 <i>close date already past (Jul 15)</i>	51 days quiet
Brookline Media 006SYNAUG002 • Taylor Brooks Last activity Jul 3, 2026	48 days quiet

Four deals lifted the forecast; three carry exposure worth watching

Upside reflects tracked stage/category/amount movement since Jul 18. Exposure flags hygiene signals — not predictions that a deal will slip (forecast-rules.md rule 8).

UPSIDE — WEIGHTED FORECAST INCREASED

Dovetail Travel

006SYNAUG004

BestCase → Commit · Proposal → Negotiation

+\$168K

Aster Health

006SYNAUG001

Pipeline → BestCase · Proposal → Negotiation

+\$119K

Junction Apparel

006SYNAUG010

Pipeline → BestCase · Proposal → Negotiation

+\$91K

Lantern Beauty

006SYNAUG012

Amount \$150K → \$175K · Proposal (no change)

+\$6K

Combined weighted lift: +\$384K (matches the +\$384K total on page 4)

EXPOSURE TO WATCH — NO WEIGHTED FORECAST DECLINE OCCURRED

Dovetail Travel

006SYNAUG004

Largest single opportunity and the only Commit-category deal — \$420K, 31.6% of total weighted forecast — yet has sat in Negotiation 76 days, the longest stage tenure in the book.

current-pipeline.csv

Harborlight Mobility

006SYNAUG008

Close date moved from Sep 30 to Oct 31 (+31 days) with stage and category unchanged (BestCase, \$290K, weighted \$174K).

current-pipeline.csv; prior-pipeline.csv

Elmstead Home

006SYNAUG005

Close date (Jul 15) is already before the snapshot date while still open in Proposal/BestCase; no logged activity in 51 days.

current-pipeline.csv

None of these three show a weighted-forecast decrease — they are hygiene and concentration signals, not evidence of slippage or loss.

Five follow-ups before the next snapshot, plus gaps that limit confidence today

Actions are grounded in the flags on pages 4–6 and tied to the existing opportunity owner. No new owners, dates, or commitments are implied.

SUGGESTED FOLLOW-UPS, BY OWNER

Casey Nguyen	Dovetail Travel · 006SYNAUG004
Validate the Negotiation/Commit progression before counting full weighted value — 76 days in stage is the longest in the book.	
Jordan Lee	Elmstead Home · 006SYNAUG005
Confirm whether the evaluation is still active and reset the close date; documented next step already flags this (current-pipeline.csv).	
Casey Nguyen	Harborlight Mobility · 006SYNAUG008
Review the revised close plan given the 31-day slip from Sep 30 to Oct 31; next step already logged.	
Taylor Brooks	Newbridge Education & Brookline Media
Re-engage both accounts — 76 and 48 days without logged activity respectively — before next snapshot.	
Morgan Patel	Owner-level coverage · 0.57x
Lowest coverage of the four owners against an \$850K target; review pipeline generation plan for this book.	

UNRESOLVED DATA PROBLEMS

targets.csv has one snapshot date (2026-08-20) only — no prior-period target exists, so prior coverage cannot be calculated.
No field in any source states the time period a target covers (month, quarter, or year).
seller-notes.csv duplicates the NextStep field in current-pipeline.csv for all 16 opportunities — no independent commentary explains the three category upgrades or the Lantern Beauty amount increase.
Elmstead Home's CloseDate (2026-07-15) is already before the snapshot date while the opportunity remains open; not corrected in current-pipeline.csv.
Only two snapshots exist (2026-07-18 and 2026-08-20); trend depth is limited to one comparison point.

What this deck is built on, what it cannot show, and how to read it

SOURCES USED

current-pipeline.csv

16 open opportunities · snapshot 2026-08-20

prior-pipeline.csv

16 opportunities · snapshot 2026-07-18

targets.csv

4 owner targets · snapshot 2026-08-20

seller-notes.csv

16 notes · duplicates NextStep field

forecast-rules.md

calculation rules, applied as written

Folder: *source-pack/august-pipeline/*

SYNTHETIC DATA — fictional companies, no real customer data (all five files).

MISSING INFORMATION

No prior-period target — targets.csv holds a single snapshot date, so prior coverage cannot be computed.

No stated time period for the target (month, quarter, or year).

No rationale field for the three category upgrades or the Lantern Beauty amount increase.

No historical win/loss data to check the 25% / 60% / 100% weights against actual conversion.

No seller commentary beyond the NextStep field duplicated in seller-notes.csv.

LIMITATIONS — HOW TO READ THIS DECK

Coverage, weighted forecast, concentration, aging, and staleness are calculated exactly per forecast-rules.md; figures trace to the cited file and Opportunity ID.

These measures are diagnostic, not predictive. Per rule 8, stale data, slippage, and concentration are not evidence a deal will close or be lost.

Concentration ranks the two largest opportunities by deal Amount (rule 4's "largest open opportunities").

Sample is small — 16 opportunities across 4 owners — so ratios and shares are sensitive to any single deal.

All figures are the 2026-08-20 snapshot unless labeled "prior" (2026-07-18).