

Pipeline snapshot — weekly revenue review

Snapshot 2026-08-20 · prior 2026-07-18 · 16 open opps · 4 owners

FORECAST CALL · ALL OWNERS

weighted = Pipeline 25% · Best Case 60% · Commit 100%

Open pipeline

Weighted forecast

Target

Coverage = open ÷ target

\$2.73M

\$1.33M

\$2.90M

0.94×

sum of Amount, 16 opps

49% of open pipeline

sum of 4 owner targets

= \$2.73M ÷ \$2.90M

bar length = target \$2.90M

open \$2.73M = 94% of target

weighted \$1.33M = 46% of target

weighted: Commit \$420k×100% = \$420k

Best Case \$950k×60% = \$570k

Pipeline \$1,360k×25% = \$340k

BY OWNER · OPEN ÷ TARGET (targets.csv) · 4 OPPS EACH

Jordan Lee

\$715k ÷ \$700k = 1.02×

weighted \$319k

Taylor Brooks

\$535k ÷ \$650k = 0.82×

weighted \$225k

Morgan Patel

\$485k ÷ \$850k = 0.57×

weighted \$121k

Casey Nguyen

\$995k ÷ \$700k = 1.42×

weighted \$665k

MOVEMENT SINCE 2026-07-18

Same 16 IDs in both snapshots; none added or closed; 11 unchanged. Open \$2,705k → \$2,730k (+\$25k). Weighted \$946k → \$1,330k (+\$384,250).

Amount changed (1) — Lantern Beauty \$150k → \$175k (+\$25k), category Pipeline unchanged, weighted +\$6,250. No activity logged since 2026-06-20.

Category changed, amount unchanged (3) — Aster Health Pipeline → Best Case (+\$119k); Dovetail Travel Best Case → Commit (+\$168k); Junction Apparel Pipeline → Best Case (+\$91k). All three also moved Proposal → Negotiation. Weighted +\$378,000: 98% of the increase is re-rating, not new pipeline.

Close date only (1) — Harborlight Mobility 2026-09-30 → 2026-10-31 (+31 days); amount, category, weighted unchanged.

CONCENTRATION · AGING · STALE

Concentration — Dovetail Travel \$420k + Aster Health \$204k = \$624k ÷ \$1,330k weighted = **47%** of the weighted forecast.

Aging (≥ 60 days flagged) — opportunity age 16/16 flagged (96–196 days from CreatedDate); stage age 8/16 flagged (64–78 days from StageEnteredDate; two dates unreliable — see data problems).

STALE — LASTACTIVITYDATE > 30 DAYS BEFORE 2026-08-20

Account	Owner	Amount · category	Idle days
Newbridge Education	Taylor Brooks	\$95k Pipeline	76
Lantern Beauty	Casey Nguyen	\$175k Pipeline	61
Elmstead Home	Jordan Lee	\$60k Best Case	51
Brookline Media	Taylor Brooks	\$85k Pipeline	48

Stale total: 4 of 16 opps · \$415k open · \$125k weighted. Kingswell Hospitality is idle exactly 30 days: not stale under rule 5.

MANAGEMENT ACTIONS — JUDGMENT

1. Casey Nguyen — Test the Dovetail Travel Commit: \$420k at 100% is 32% of the weighted forecast, closes 2026-09-30 (41 days); recorded next step “Complete procurement approval”. Confirm procurement status before the Commit stands.

2. Jordan Lee — Decide Elmstead Home: close date 36 days past, 51 days idle, still Best Case (\$60k; \$36k weighted). Re-date, re-categorise or close — the data does not say which.

3. Morgan Patel — Close the coverage gap: \$485k ÷ \$850k = 0.57×, weighted \$121k, all 4 opps in Pipeline category. Agree the qualification path for the two Discovery deals and the source of new pipeline.

DATA PROBLEMS — HYGIENE

1. Elmstead Home (Jordan Lee): CloseDate 2026-07-15 has passed; record still open.

2. StageEnteredDate moved earlier while stage advanced: Dovetail Travel 06-12 → 06-05; Junction Apparel 06-24 → 06-11.

3. Prior file (2026-07-18): 12 of 16 LastActivityDate values post-date its own snapshot (e.g. Aster Health 2026-08-10); history looks overwritten.

4. Lantern Beauty (Casey Nguyen): Amount +\$25k, no activity since 2026-06-20.

SOURCES & LIMITATIONS — source-pack/august-pipeline/: current-pipeline.csv (2026-08-20, 16 rows), prior-pipeline.csv (2026-07-18, 16 rows), targets.csv (4 owners), seller-notes.csv (16 rows), forecast-rules.md (rules 1–8). No Closed Won/Lost rows in either file, so open = total pipeline. targets.csv states no period; team target = sum of 4 owner targets. seller-notes.csv duplicates pipeline fields; no independent evidence. No history or outside context used. Stale data, slippage and concentration are hygiene signals, not proof a deal will close or be lost (rule 8). Synthetic data. Snapshot 2026-08-20.