

COVERAGE OF TARGET

0.94x

= \$2,730,000 open ÷ \$2,900,000 target

Open pipeline is below target; gap \$170,000.

OPEN PIPELINE

\$2.73M

\$2,730,000 = sum of Amount,
16 open rows; none closed

WEIGHTED FORECAST

\$1.33M

Commit 420k × 1.00 + Best Case
950k × 0.60 + Pipeline 1,360k × 0.25

TARGET

\$2.90M

Sum of 4 owner targets:
700k + 650k + 850k + 700k

Coverage by owner (open \$k ÷ target \$k): Jordan Lee 1.02x (715/700) · Taylor Brooks 0.82x (535/650)
Morgan Patel 0.57x (485/850) · Casey Nguyen 1.42x (995/700)

MOVEMENT SINCE 2026-07-18

Amount and close-date changes

Lantern Beauty +\$25k (150k → 175k); wt +\$6.3k
Harborlight close slipped 09-30 → 10-31 (+31d)

Category-only moves (amounts unchanged)

Aster Health Pipeline → Best Case +\$119k wt
Dovetail Travel Best Case → Commit +\$168k wt
Junction Apparel Pipeline → Best Case +\$91k wt

Net: open +\$25k · weighted +\$384k

98% of the weighted gain (\$378k of \$384k)
is category upgrades, not new money. No deals
were added, removed, or closed.

CONCENTRATION · AGING · STALE

Top 2 deals hold 47% of weighted forecast

Dovetail \$420k wt + Aster \$204k wt = \$624k
of the \$1,330k weighted total.

Aging (flag at ≥ 60 days)

16 of 16 opps ≥ 60d since created (96–196d).
8 of 16 in current stage ≥ 60d (64–78d) —
but see the stage-date problem below.

Stale: no activity in > 30 days (\$415k)

Newbridge Education	76d idle	\$95k
Lantern Beauty	61d idle	\$175k
Elmstead Home	51d idle	\$60k
Brookline Media	48d idle	\$85k

MANAGEMENT ACTIONS

- Casey Nguyen**
Verify the Dovetail Commit call — \$420k,
32% of the weighted forecast. Next step
on record: complete procurement approval.
- Jordan Lee**
Resolve Elmstead: close date 36 days past,
51 days idle, still Best Case. Confirm the
evaluation is live, then correct the record.
- Taylor Brooks**
Re-engage Newbridge (76d idle) and
Brookline (48d idle); both close Sep–Oct.
Confirm live evaluations before next week.

DATA PROBLEMS TO FIX — pipeline hygiene, kept separate from judgment; not evidence any deal will close or be lost

- Stage dates rewound between snapshots:**
Dovetail StageEnteredDate 06-12 → 06-05; Junction 06-24 → 06-11,
though both moved Proposal → Negotiation. Their stage aging is
unreliable until corrected in CRM.
- Elmstead Home: open in Best Case with CloseDate 2026-07-15,**
36 days before this snapshot.
- Lantern Beauty: amount raised +\$25k with no activity**
recorded since 2026-06-20 (61 days).
- No team target supplied: the \$2.90M target is the sum of**
the four owner targets in targets.csv, and the target period
(quarter, half, or year) is not stated in the file.

Sources (source-pack/august-pipeline/): current-pipeline.csv (2026-08-20) · prior-pipeline.csv (2026-07-18) · targets.csv · seller-notes.csv · forecast-rules.md (weights: Pipeline 25% / Best Case 60% / Commit 100%).
Limitations: single snapshot pair; no closed-won history, win rates, or target period supplied; stale dates, slippage, and concentration are flags, not outcomes (rule 8). Synthetic data — fictional companies.