

Pipeline Snapshot — Weekly Revenue Review

Open opportunities across all owners · compared against prior snapshot 2026-07-18

SNAPSHOT: 2026-08-20

FORECAST CALL

OPEN PIPELINE

\$2.73M

Sum of Amount, 16 open opps (rule 1)

WEIGHTED FORECAST

\$1.33M

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

TARGET

\$2.90M

Sum of 4 owner targets (targets.csv)

COVERAGE — OPEN PIPELINE ÷ TARGET

\$2,730,000 ÷ \$2,900,000

0.94x

1.0x target

MOVEMENT SINCE PRIOR SNAPSHOT 2026-07-18 → 2026-08-20 · by Opportunity ID

CATEGORY / STAGE CHANGED — AMOUNT UNCHANGED

+ \$378,000 weighted (3 opps)

Aster Health \$340K flat: Pipeline → BestCase, wtd +\$119K

Dovetail Travel \$420K flat: BestCase → Commit, wtd +\$168K

Junction Apparel \$260K flat: Pipeline → BestCase, wtd +\$91K

All three also moved Proposal → Negotiation.

AMOUNT CHANGED

+ \$25,000 open / + \$6,250 wtd

Lantern Beauty \$150K → \$175K, category unchanged (Pipeline)

Only Amount change in the book — open pipeline moved by exactly this figure.

CLOSE DATE CHANGED ONLY

1 opportunity slipped

Harborlight Mobility close date 2026-09-30 → 2026-10-31 (+31 days).

Amount, category, weighted value unchanged.

Net weighted forecast: \$945,750 → \$1,330,000 (+\$384,250). 98% of that (\$378,000) is reclassification, not new/larger deals.

CONCENTRATION

46.9%

of total weighted forecast (\$1,330,000) sits in the two largest open opportunities:

Dovetail Travel — \$420,000 Commit → weighted \$420,000

Aster Health — \$340,000 BestCase → weighted \$204,000

Combined weighted \$624,000 ÷ \$1,330,000 total

OPPORTUNITY & STAGE AGING (FLAG ≥ 60 DAYS)

16 / 16

OPP. AGE ≥60D (CREATEDDATE), RANGE 96–196D

Brookline Media — Proposal 78d

Dovetail Travel — Negotiation 76d

Fortis Bank — Proposal 74d

Harborlight Mobility — Proposal 72d

Junction Apparel — Negotiation 70d

+3 more ≥60 days: Lantern Beauty (68d), Newbridge Education (66d), Pinecrest Telecom (64d).

8 / 16

STAGE AGE ≥60D (STAGEENTEREDDATE)

STALE (LASTACTIVITY >30D BEFORE 2026-08-20)

Newbridge Education (Taylor Brooks) 76d

Lantern Beauty (Casey Nguyen) 61d

Elmstead Home (Jordan Lee) 51d

Brookline Media (Taylor Brooks) 48d

4 of 16 open opportunities. Staleness is a data-freshness signal only — not evidence the deal will close or slip (forecast-rules.md, rule 8).

MANAGEMENT ACTIONS

Morgan Patel

Lowest territory coverage: \$485,000 open ÷ \$850,000 target = 0.57x. Review pipeline generation before next snapshot.

Jordan Lee

Elmstead Home (\$60,000) shows CloseDate 2026-07-15 — already past — while still open at Proposal/BestCase. Confirm true status.

Taylor Brooks · Casey Nguyen

Confirm current status on remaining stale opportunities: Brookline Media, Newbridge Education (Brooks); Lantern Beauty (Nguyen).

DATA PROBLEMS TO FIX

- Elmstead Home (006SYNAUG005): close date precedes snapshot date by 36 days while stage remains open — record inconsistency.
- seller-notes.csv duplicates current-pipeline.csv NextStep/LastActivityDate/OwnerId for all 16 rows — no incremental seller commentary available.
- 100% of open opportunities exceed the 60-day opportunity-age flag (96–196 days) — confirm CreatedDate reflects true origination, not a default/import date.

Sources: current-pipeline.csv (16 rows, 2026-08-20); prior-pipeline.csv (16 rows, 2026-07-18); targets.csv (2026-08-20); seller-notes.csv (redundant, see Data Problems); forecast-rules.md — all rules applied as written.

Method: Open pipeline = sum(Amount), stage ≠ Closed. Weighted = category weight × Amount. Coverage = open ÷ target. Concentration = top-2 weighted ÷ total weighted. Aging/staleness per rules 5–6.

Limitations: No Closed Won/Lost rows in either snapshot — reflects open-pipeline movement only, not bookings. Coverage/concentration/aging are point-in-time facts, not predictions. Synthetic data — fictional companies, no real customer data.