Pipeline Snapshot — Weekly Revenue Review

Snapshot date: 2026-08-20 | Prior snapshot: 2026-07-18

OPEN PIPELINE
$2,730,000
Sum of Amount, open stages (forecast-rules.md #1)

WEIGHTED FORECAST
$1,330,000
25% Pipeline / 60% Best Case / 100% Commit (rules.md #2)

TARGET
$2,900,000
Sum of 4 owner targets (targets.csv)

COVERAGE (below 1.0×)
0.94×
$2,730,000 open ÷ $2,900,000 target (forecast-rules.md #3)

MOVEMENT · 2026-07-18 → 2026-08-20

Category-only change (amount unchanged):

- Aster Health — Pipeline→Best Case, wtd +$119K
- Dovetail Travel — Best Case→Commit, wtd +$168K
- Junction Apparel — Pipeline→Best Case, wtd +$91K

Subtotal +$378K weighted; all three also advanced Proposal→Negotiation

Amount change:

- Lantern Beauty — Amount $150K→$175K, wtd +$6.3K

Close-date slip (no amount/category change):

- Harborlight Mobility — close date 2026-09-30→2026-10-31

Net weighted forecast: $945,750 → $1,330,000 (+$384,250)

Open pipeline: $2,705,000 → $2,730,000 (+$25,000, all from Lantern Beauty)

CONCENTRATION · AGING · STALE

Concentration — 2 largest open opps:

Dovetail Travel $420K + Aster Health $340K = $624K weighted (47%)
(Dovetail: Commit, wtd $420K; Aster: Best Case, wtd $204K)

Stage aging ≥60 days (StageEnteredDate): 8 of 16, $1,530,000

Brookline 78d, Dovetail 76d, Fortis 74d, Harborlight 72d, Junction 70d, Lantern 68d, Newbridge 66d, Pinecrest 64d

Opportunity aging ≥60 days (CreatedDate): 16 of 16 (100%)

Every open opportunity trips this flag — not discriminating here; see Data problems.

Stale, no activity >30 days: 4 of 16, $415,000

Brookline 85K/48d, Elmstead 60K/51d, Lantern 175K/61d, Newbridge 95K/76d

MANAGEMENT ACTIONS

Jordan Lee — Elmstead Home ($60,000): close date 2026-07-15 already passed while stage is still Proposal/Best Case and activity is 51 days old. Confirm status before next forecast.

Taylor Brooks — Two of her deals are stale: Brookline Media ($85,000, 48 days) and Newbridge Education ($95,000, 76 days, also 66 days in stage). Refresh activity to keep category assignments defensible.

Casey Nguyen — Owns the largest single weighted contributor, Dovetail Travel ($420,000, 32% of weighted forecast alone), plus this period's only close-date slip, Harborlight Mobility (9/30→10/31). Reconfirm both.

DATA PROBLEMS TO FIX

- Elmstead Home (006SYNAUG005): CloseDate 2026-07-15 is before the snapshot date while the opportunity remains open (Proposal / Best Case). Close date needs correction or the stage needs updating.
- seller-notes.csv duplicates current-pipeline.csv exactly for all 16 rows (NextStep = SellerNote, same LastActivityDate/OwnerId, 0 differences) — no independent source to corroborate activity recency.
- Opportunity-age flag (CreatedDate ≥60 days) fires on all 16 of 16 open opportunities (100%) — this threshold does not discriminate on this pipeline; only stage-age (35–78 days) varies meaningfully.

SOURCES & LIMITATIONS

source-pack/august-pipeline/: current-pipeline.csv, prior-pipeline.csv (2026-07-18), targets.csv, seller-notes.csv — rules applied exactly as written in forecast-rules.md. Same 16 opportunity IDs present in both snapshots (no adds/drops). Coverage, concentration, aging and staleness are descriptive measures, not predictions — per forecast-rules.md #8, stale data, slippage and concentration are not proof a deal will close or be lost. No stage changes, notes, targets, owners or close dates were invented; all figures are computed from the cited files. Synthetic data — fictional companies, no real customer data.