Weekly Sales Pipeline Audit Report

This weekly brief summarises the pipeline audit of the active deals for the current quarter. It is built from the latest CRM data, combined with deal notes from Account Executives (AEs) on the opportunities they are actively working.

> **FIRST-TIME BASELINE RUN**
> First-time baseline run: historical close rates, close-date push counts, and multi-week dwell trends will accumulate starting next week.

Deals statistics

Deals analyzed	8
Accounts covered	8
AEs covered	3

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The Slippage Watchlist (Ranked by Risk)

Deal Name	AE	Value	Close Date	Risk	Primary Red Flag & Blocker Tag
Meridian Health Systems -- Meridian Clinical Analytics Rollout	Mateo Silva	$240,000	2026-11-15	HIGH	28d in stage (>21d target); Past-due close date; No future next step
Northstar Logistics -- Northstar Enterprise Consolidation	Jordan Blake	$185,000	2026-12-04	HIGH	0 activity in 17d; EB not engaged; Missed Friday nudge
Vanguard FinTech -- Vanguard Core RevOps Suite	Mateo Silva	$95,000	Unset	HIGH	0 activity in 19d; No future next step
Stratos Manufacturing -- Stratos Fleet Telemetry Deal	Mateo Silva	$118,000	2026-11-28	MEDIUM	31d in stage (>21d target); EB not engaged
Helios Cloud Security -- Helios Global Platform License	Elena Rostova	$310,000	2026-12-18	LOW	EB not engaged
Kestrel Robotics -- Kestrel EMEA Expansion	Elena Rostova	$142,000	2026-12-11	LOW	Minor qualification gaps
Crescent BioLabs -- Crescent Series B Revenue Ops	Jordan Blake	$52,000	2026-12-15	LOW	Minor qualification gaps

Deal Qualification Grids (CHAMP Stage 1 & MEDDPICC Stage 2+)

Legend: Y = Verified with buyer evidence | ~ = Partial / Assumed | X = Missing | Dc = Decision Criteria, Dp = Decision Process, Ch = Champion, Co = Competition

Stage 1 Deals -- CHAMP Entry Gate

Deal Name	AE	Value	Days	C	A	M	P	Stage 1 Gate Verdict
Bramble Retail Group -- Bramble Multi-Region Pilot	Jordan Blake	$64k	18d	X	X	X	~	STALLED_BLOAT

Stage 2+ Deals -- MEDDPICC Execution Gate

Deal Name	AE	Stg	Val	M	E	Dc	Dp	P	I	Ch	Co	Primary Qualification Gap
Meridian Health Systems -- Meridian Clinical Analytics Rollout	Mateo Silva	Stg 3	$240k	X	~	Y	~	Y	Y	~	~	Metrics unquantified
Northstar Logistics -- Northstar Enterprise Consolidation	Jordan Blake	Stg 4	$185k	X	X	Y	~	Y	X	~	~	Metrics unquantified; No EB
Vanguard FinTech -- Vanguard Core RevOps Suite	Mateo Silva	Stg 2	$95k	X	X	X	X	X	X	X	~	Metrics unquantified; No EB
Stratos Manufacturing -- Stratos Fleet Telemetry Deal	Mateo Silva	Stg 4	$118k	X	X	~	~	Y	X	~	~	Metrics unquantified; No EB
Helios Cloud Security -- Helios Global Platform License	Elena Rostova	Stg 3	$310k	X	X	Y	~	X	~	~	~	Metrics unquantified; No EB
Kestrel Robotics -- Kestrel EMEA Expansion	Elena Rostova	Stg 4	$142k	X	Y	~	Y	~	~	Y	~	Metrics unquantified
Crescent BioLabs -- Crescent Series B Revenue Ops	Jordan Blake	Stg 2	$52k	~	~	Y	Y	X	X	~	Y	Paper Process unconfirmed; Pain unverified

Deal-by-Deal Slippage Autopsies (Top Risk Deals)

DEAL AUTOPSY #1: MERIDIAN HEALTH SYSTEMS -- MERIDIAN CLINICAL ANALYTICS ROLLOUT ($240,000) | AE: Mateo Silva | STAGE: DEMO / TECHNICAL EVALUATION

Momentum Trend (Ledger): Initial baseline snapshot: 28d in Demo / Technical Evaluation.

Governance Gaps: Missing M_metrics.

Field Blocker Detected: No product/commercial blocker flagged.

Engagement Reality: Last activity 3d ago; Mateo Silva notes reviewed.

Exact Question for Mateo Silva in 1:1: On Meridian Health Systems -- Meridian Clinical Analytics Rollout: Metrics unquantified remains unverified -- what concrete buyer event happens this week to support 2026-11-15?

Recommended Move: Mateo Silva must escalate the HIPAA BAA redlines to outside counsel immediately and partner with Marcus Vance to schedule a direct alignment call with the CIO to validate the Q1 FHIR connector delivery timeline and mutual close criteria.

DEAL AUTOPSY #2: NORTHSTAR LOGISTICS -- NORTHSTAR ENTERPRISE CONSOLIDATION ($185,000) | AE: Jordan Blake | STAGE: PROPOSAL / NEGOTIATION
Momentum Trend (Ledger): Initial baseline snapshot: 36d in Proposal / Negotiation.
Governance Gaps: Missing M_metrics, E_economic_buyer, I_identify_pain.
Field Blocker Detected: None confirmed -- Jordan Blake has no call notes submitted this week.
Engagement Reality: No inbound buyer activity logged for 17 days.
Exact Question for Jordan Blake in 1:1: On Northstar Logistics -- Northstar Enterprise Consolidation: Metrics unquantified; No EB remains unverified -- what concrete buyer event happens this week to support 2026-12-04?
Recommended Move: Work with VP of Sales to immediately send the co-authored executive note to CFO David Miller to secure EB alignment and schedule the joint commercial and security closure call.

DEAL AUTOPSY #3: VANGUARD FINTECH -- VANGUARD CORE REVOPS SUITE ($95,000) | AE: Mateo Silva | STAGE: QUALIFICATION
Momentum Trend (Ledger): Initial baseline snapshot: 25d in Qualification.
Governance Gaps: Missing M_metrics, E_economic_buyer, D_decision_criteria.
Field Blocker Detected: No product/commercial blocker flagged.
Engagement Reality: No inbound buyer activity logged for 19 days.
Exact Question for Mateo Silva in 1:1: On Vanguard FinTech -- Vanguard Core RevOps Suite: Metrics unquantified; No EB remains unverified -- what concrete buyer event happens this week to support the target close date?
Recommended Move: Instruct Mateo Silva to ask Priya Nair for a warm introduction to Graham Foster and attempt direct outreach; if no meeting is secured within 7 days, disqualify and mark Vanguard Core RevOps Suite as Closed Lost.

DEAL AUTOPSY #4: STRATOS MANUFACTURING -- STRATOS FLEET TELEMETRY DEAL ($118,000) | AE: Mateo Silva | STAGE: PROPOSAL / NEGOTIATION
Momentum Trend (Ledger): Initial baseline snapshot: 31d in Proposal / Negotiation.
Governance Gaps: Missing M_metrics, E_economic_buyer, I_identify_pain.
Field Blocker Detected: No product/commercial blocker flagged.
Engagement Reality: Last activity 6d ago; Mateo Silva notes reviewed.
Exact Question for Mateo Silva in 1:1: On Stratos Manufacturing -- Stratos Fleet Telemetry Deal: Metrics unquantified; No EB remains unverified -- what concrete buyer event happens this week to support 2026-11-28?
Recommended Move: Mateo Silva must partner with Hannah Brooks immediately to secure an introduction to the VP of Finance to align on commercial risk and business impact, while partnering with General Counsel on a compromised liability cap framework.

DEAL AUTOPSY #5: HELIOS CLOUD SECURITY -- HELIOS GLOBAL PLATFORM LICENSE ($310,000) | AE: Elena Rostova | STAGE: DEMO / TECHNICAL EVALUATION
Momentum Trend (Ledger): Initial baseline snapshot: 9d in Demo / Technical Evaluation.
Governance Gaps: Missing M_metrics, E_economic_buyer, P_paper_process.
Field Blocker Detected: No product/commercial blocker flagged.
Engagement Reality: Last activity 1d ago; Elena Rostova notes reviewed.
Exact Question for Elena Rostova in 1:1: On Helios Cloud Security -- Helios Global Platform License: Metrics unquantified; No EB remains unverified -- what concrete buyer event happens this week to support 2026-12-18?
Recommended Move: Elena Rostova must leverage the upcoming security architecture review with CISO Aaron Patel and Rachel Kim to identify who holds discretionary budget authority for 310000 and uncover the quantifiable business impact of failing to implement the Snowflake and Datadog integrations.

AE Execution & Forecast Reliability Scorecard

AE	CRM Commit	Reality-Adjusted	Historical Close %	Stalled (>14d)	Friday Nudge
Jordan Blake	$185,000	$92,500	Baseline (1st Week)	2 deals ($249k)	MISSED
Mateo Silva	$118,000	$59,000	Baseline (1st Week)	3 deals ($453k)	ON TIME
Elena Rostova	$142,000	$142,000	Baseline (1st Week)	0 deals ($0)	ON TIME

Forwardable Hygiene Hit-List

Copy-paste these to individual AEs for actions they need to take on their deals.

* **Jordan Blake:**
* **Northstar Logistics -- Northstar Enterprise Consolidation:** No activity for 17d
* **Northstar Logistics -- Northstar Enterprise Consolidation:** Verify Metrics unquantified; No EB
* **Bramble Retail Group -- Bramble Multi-Region Pilot:** No activity for 15d
* **Crescent BioLabs -- Crescent Series B Revenue Ops:** Verify Paper Process unconfirmed; Pain unverified
* Submit latest deal email threads & call notes (missed Friday nudge)
* **Mateo Silva:**
* **Meridian Health Systems -- Meridian Clinical Analytics Rollout:** Past-due close date
* **Meridian Health Systems -- Meridian Clinical Analytics Rollout:** Verify Metrics unquantified
* **Vanguard FinTech -- Vanguard Core RevOps Suite:** Missing close date
* **Vanguard FinTech -- Vanguard Core RevOps Suite:** Missing next step
* **Vanguard FinTech -- Vanguard Core RevOps Suite:** No activity for 19d
* **Vanguard FinTech -- Vanguard Core RevOps Suite:** Verify Metrics unquantified; No EB
* **Elena Rostova:**
* **Kestrel Robotics -- Kestrel EMEA Expansion:** Verify Metrics unquantified
* **Helios Cloud Security -- Helios Global Platform License:** Verify Metrics unquantified; No EB

Monthly AE Stage-Bottleneck Coaching Report

INITIAL SNAPSHOT BASELINE
Trailing 60-day dwell-time benchmarks and stage drop-off percentages will refine automatically as weekly snapshots accumulate.

AE Stage Dwell-Time vs. Team Benchmark (Initial Baseline)

AE	Discovery (Avg: 18d)	Qualification (Avg: 16d)	Proposal (Avg: 18d)	Negotiation (Avg: 26d)	Primary Bottleneck
Jordan Blake	18 days	7 days	0 days	36 days	LOW: Negotiation
Mateo Silva	0 days	25 days	28 days (1.6x)	31 days	MED: Proposal
Elena Rostova	0 days	0 days	9 days	12 days	LOW: Proposal

Individual AE Bottleneck Diagnostics & Coaching Prescriptions

AE COACHING PROFILE: Jordan Blake | BOTTLENECK: NEGOTIATION (36d vs. 26d TEAM AVG)
Drop-Off Impact: $185,000 currently stalled in Negotiation (1st week baseline for Jordan Blake).
Root-Cause Pattern: New AE baseline (1st week tracked): Jordan Blake averages 36d in Negotiation across 3 active deal(s).
Next Month's Coaching Prescription: On Northstar Enterprise Consolidation, you have marked the deal as Commit without direct access to CFO David Miller and with outstanding Okta SAML/SCIM and BYOK blockers; what is your path to securing executive sponsorship to resolve these technical prerequisites before signature?

AE COACHING PROFILE: Mateo Silva | BOTTLENECK: PROPOSAL (28d vs. 18d TEAM AVG)
Drop-Off Impact: $240,000 currently stalled in Proposal (1st week baseline for Mateo Silva).
Root-Cause Pattern: New AE baseline (1st week tracked): Mateo Silva averages 28d in Proposal across 3 active deal(s).
Next Month's Coaching Prescription: On Stratos Fleet Telemetry Deal, what is your specific tactical plan to access the VP of Finance to resolve the 3x contract liability cap stalemate, given that the deal is in Proposal / Negotiation without Economic Buyer engagement?

AE COACHING PROFILE: Elena Rostova | BOTTLENECK: PROPOSAL (9d vs. 18d TEAM AVG)
Drop-Off Impact: $0 currently stalled in Proposal (1st week baseline for Elena Rostova).
Root-Cause Pattern: New AE baseline (1st week tracked): Elena Rostova averages 9d in Proposal across 2 active deal(s).
Next Month's Coaching Prescription: On Kestrel EMEA Expansion, with a targeted close date of Dec 11, what specific legal, InfoSec, and procurement milestones must be completed between now and then, and is the Q1 Salesforce custom object sync a hard gating item for signature?