

SPECIMEN REPORT / 6-MONTH PORTFOLIO VIEW

Product x Sales connect

A recurring standup brief that connects customer demand, product readiness, commercial motion and decisions.

BUILD TICKET

WIB-104

IN DEMO / SYNTHETIC

12

DEMO REQUESTS

06

QUALIFIED

03

PILOT-READY

02

DECISIONS

What this report tells you

This report gives Product and Sales a shared view of which customer problems are repeatable, which features are ready to show, what proof is missing, and what follow-up belongs to each team.

Connect focus

- Nova onboarding lift is a demo signal, not a validated claim.
- Lotus and Ember need data/partner prerequisites.
- Keep customer language and product evidence linked.

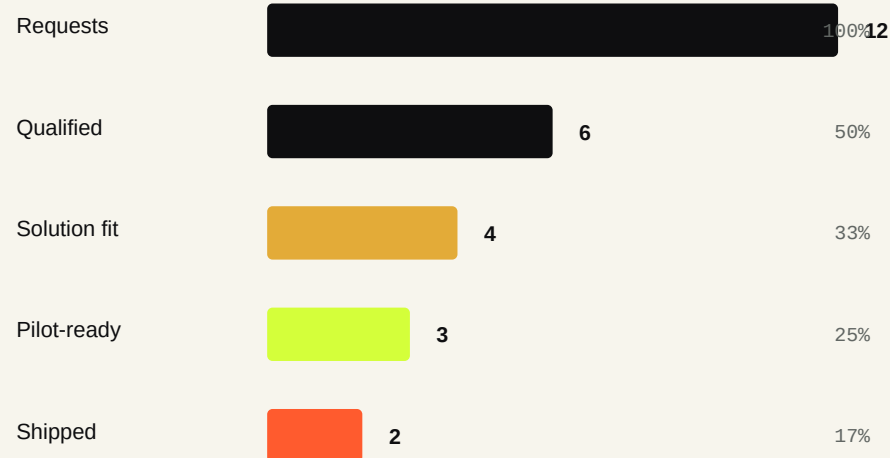
REPORTING BASIS

Synthetic-only sample using placeholder clients Alpha, Lotus, Pearl, Cedar, Nova and Ember. Six-month trend is May-October 2026; October values are month-to-date through 20 October. Action dates are illustrative planning dates for 26-30 October.

Demand-to-delivery funnel

Illustrative requests across six placeholder accounts; stage counts are synthetic.

Opportunity funnel



Interpretation

- Half of the modeled requests qualify for discovery.
- Three use cases are ready for a structured pilot conversation.
- Two shipped capabilities have a demo proof point.
- Do not treat funnel counts as bookings or revenue.

DEMO PROOF POINT

Nova: onboarding completion increased by 8 percentage points in a fictional experiment. Confirm cohort size, guardrails and measurement window before using externally.

Shared qualification questions

Who experiences the problem? What evidence shows frequency or impact? Which product capability addresses it? What is the smallest safe pilot? Who owns the next customer follow-up?

Feature readiness and account fit

A simple readiness matrix prevents promising features before evidence and owners are in place.

ACCOUNT	USE CASE	DONE	EVIDENCE	MISSING PROOF	SALES MOTION
Nova	Guided onboarding	94%	8-point demo lift	Guardrails review	READY FOR PILOT
Pearl	Accessible portal	93%	Core flow pass	A11y sign-off	CONDITIONAL
Alpha	Launch API	88%	Contract signed	Cert slot	CONDITIONAL
Lotus	Payment refresh	76%	Webhook tests ready	Sandbox access	BLOCKED
Cedar	Analytics export	82%	94% sampled parity	Threshold sign-off	CONDITIONAL
Ember	CRM consolidation	73%	Field map drafted	Source owners	BLOCKED

Safe language

Say 'pilot-ready pending guardrails' when the experiment is promising but thresholds are not signed. Say 'blocked on partner access' when the customer cannot test yet.

Evidence rule

Link each commercial claim to a dated product artifact, experiment result or owner-confirmed customer note. Label unsupported items as hypotheses.

Meeting notes, decisions and follow-ups

Convert recurring standup discussion into owners, dates and proof points.

TEAM	TOPIC	TYPE	OWNER	DUE	TICKET
Product	Nova rollout guardrails	Decision	Ella Park	27 Oct	WIB-NOV-072
Sales	Lotus sandbox escalation path	Dependency	Victor Chen	26 Oct	WIB-LOT-087
Product	Pearl accessibility release gate	Review	Priya Shah	29 Oct	WIB-PEA-153
Sales Ops	Ember source-data ownership	Decision	Jamie Fox	26 Oct	WIB-EMB-033
Product	Cedar parity threshold	Decision	Omar Reed	28 Oct	WIB-CED-066

Decisions to make in the room

- Nova: approve or revise the first 50% rollout cohort and stop conditions.
- Cedar: accept the remaining exception sample or fund targeted remediation.
- Ember: name interim data stewards to unblock field mapping.

Next-week standup / 26-30 October

A 30-minute agenda and handoff-ready action list for Product and Sales.

TIME	AGENDA	LEAD	MEETING OUTPUT
00-05	Customer evidence since last connect	Sales	One customer quote or linked note per signal
05-12	Pilot and release readiness	Product	Show readiness matrix; call out missing proof
12-20	Decisions: Nova / Cedar / Ember	Both	Record decision, owner and revisit date
20-26	Blocked customer paths: Lotus / Alpha	Sales	Name partner owner and escalation checkpoint
26-30	Read back actions	Facilitator	Confirm tickets, dates and next meeting

Expected outputs

- Updated feature-readiness matrix
- Two explicit commercial/product decisions
- Owner and date for every blocked path
- Customer-safe demo claims

Data note

All account names, metrics, requests, meeting notes and ticket IDs are fabricated. No transcript, inbox or CRM was read for this specimen.