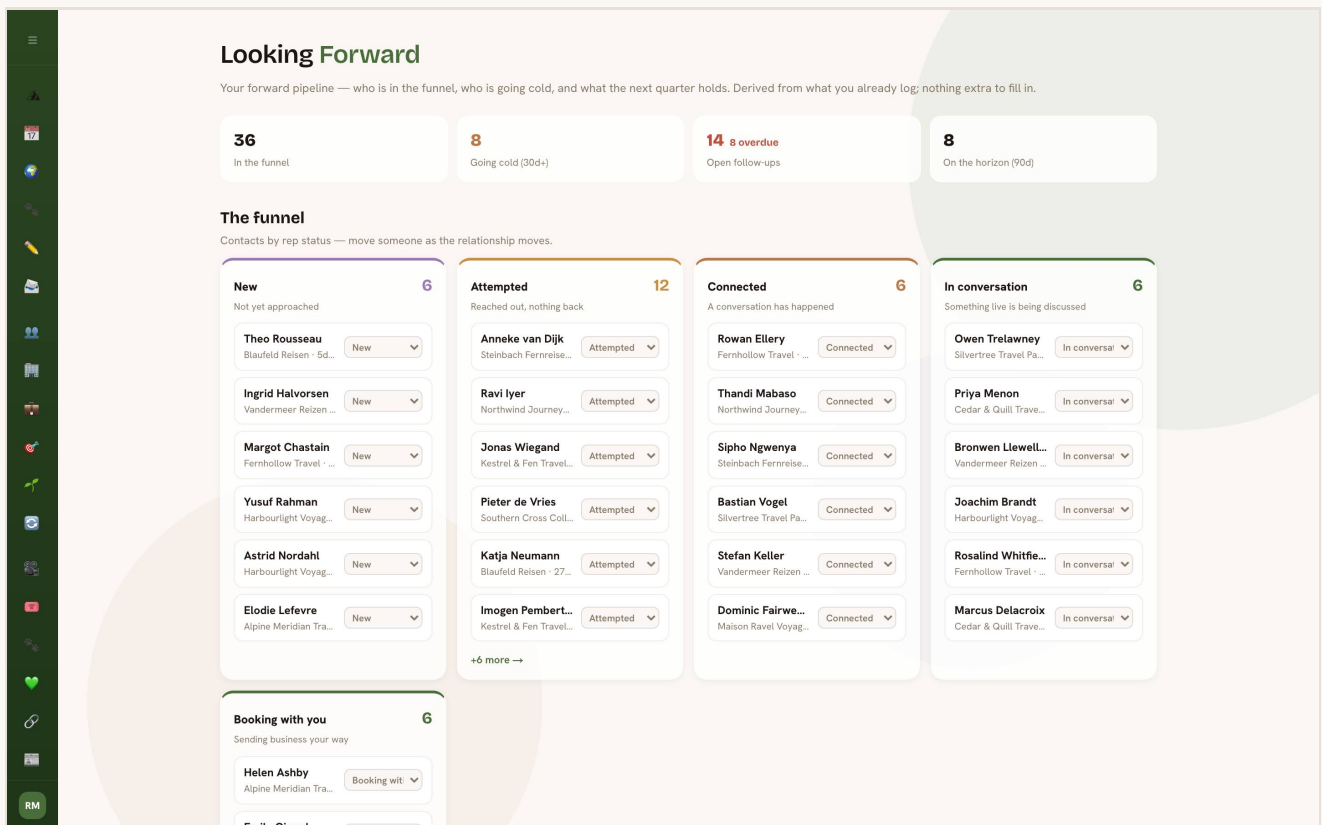


THE LOOKOUT

Looking Forward — your pipeline ahead

Looking Forward turns what you have already logged into what to do next — no new admin, no pipeline to maintain by hand.

Covers `/dashboard/looking-forward` · for rep, dmc



Looking Forward

Your forward pipeline — who is in the funnel, who is going cold, and what the next quarter holds. Derived from what you already log; nothing extra to fill in.

36
In the funnel

8
Going cold (30d+)

14 8 overdue
Open follow-ups

8
On the horizon (90d)

The funnel

Contacts by rep status — move someone as the relationship moves.

New	Attempted	Connected	In conversation
Not yet approached 6 - Theo Rousseau Blaufeld Reisen - 5d... New - Ingrid Halvorsen Vandermeer Reizen... New - Margot Chastain Fernhollow Travel... New - Yusuf Rahman Harbourlight Voyag... New - Astrid Nordahl Harbourlight Voyag... New - Elodie Lefevre Alpine Meridian Tra... New	Reached out, nothing back 12 - Anneke van Dijk Steinbach Fernreise... Attempted - Ravi Iyer Northwind Journey... Attempted - Jonas Wiegand Kestrel & Fen Travel... Attempted - Pieter de Vries Southern Cross Coll... Attempted - Katja Neumann Blaufeld Reisen - 27... Attempted - Imogen Pembert... Kestrel & Fen Travel... Attempted +6 more →	A conversation has happened 6 - Rowan Ellery Fernhollow Travel... Connected - Thandi Mabaso Northwind Journey... Connected - Sipho Ngwenya Steinbach Fernreise... Connected - Bastian Vogel Silvertree Travel Pa... Connected - Stefan Keller Vandermeer Reizen... Connected - Dominic Fairwe... Maison Ravel Voyag... Connected	Something live is being discussed 6 - Owen Trelawney Silvertree Travel Pa... In conversat - Priya Menon Cedar & Quill Trave... In conversat - Bronwen Llewel... Vandermeer Reizen... In conversat - Joachim Brandt Harbourlight Voyag... In conversat - Rosalind Whitfie... Fernhollow Travel... In conversat - Marcus Delacroix Cedar & Quill Trave... In conversat

Booking with you

Sending business your way

6

- Helen Ashby
Alpine Meridian Tra... Booking wit:
- Emile Girard

The steps

01 Open Looking Forward

The forward view: who is warm, who is cooling, and what is worth doing this week. First Class and Charter.

02 It is derived, not entered

Everything here comes from what you already log — the same last-touch reading The Ridge and Contacts use. There is no separate pipeline to keep up to date.

03 See who is going cold

Longest since you last spoke, warmest first — so the person most worth rescuing is at the top rather than the most overdue.

04 Watch the rep status

Contacts move through rep status as the relationship moves, and you can move somebody by hand when you know better than the data.

05 Who is booking with you

The people actually placing business, so effort follows the relationships that pay rather than the ones that shout.

06 Act on it

Each row leads somewhere — a task, a message, or a place in the next trip.

Next: Plan a sales trip

Questions

Do I have to maintain a pipeline for this to work?

No. Everything is derived from the interactions you already log, using the same last-touch reading as The Ridge and Contacts.

Which plans include it?

First Class and Charter.

What does "warmest first" mean?

Among the contacts who have gone quiet, the ones with the strongest history are listed first — those are the relationships most worth rescuing, not simply the most overdue.

Can I overrule it?

Yes. Rep status can be moved by hand whenever you know something the record does not.

Does it replace my own judgement about a market?

No. RepBud is designed to assist, not replace, your professional judgement — this is a reading of your own history, not a forecast.