Comfort Pro Heating & Air

Marketing Book

November 29, 2026

The period on this page. PGOS, from the company file.

The 80/20 Institute

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How to read this page

Sample company. These aren't your numbers.

Marketing. Planned $117.2K. Actual Not recorded. Variance Not recorded. Sourced pipeline $10.3M. Profit created $504.6K. Channel ROI 2.80. Spend is not the Profit Bridge number. Jan 15–Dec 15, 2025. Quads come from the invoice file. The profit and loss statement is the sum of those invoices.

A blank stays off. Nothing here posts.

Where this stands

Spend follows profit. Campaigns are aimed at Core. Pipeline is a leading measure. Only an approved, attributed win that is not already on Sales reaches the Profit Bridge. Copy is drafted, never sent.

Grow Core contract renewals. Do not spend to acquire below-cost one-off calls.

On the Profit Bridge: $117.2K.

PGOS does not print or mail this book.

Which channel holds the profit

Jan 15–Dec 15, 2025. Attributed profit by channel. Each bar is one channel. The dollar is approved attributed profit on that channel. A blank dollar stays off. A channel marked unknown stays off. The longest bar holds the most profit. Nothing posts.

Each bar is one channel. The length is that channel's approved attributed profit beside the largest on this chart. A blank dollar stays off. A channel marked unknown stays off. The chart shows the eight largest. The rest stay on the file. The dollar does not post.

Nothing here posts.

1 more channel holds profit. It stays on the file.

Attributed profit

Channel	Profit
Referral	$249.5K
Partners	$204.1K
Field briefings	$12.6K
Paid social	$10.1K
Renewals	$8.2K
Directories	$7.6K
Account email	$5.0K
Tests	$5.0K

Which company holds the attributed win

This year. Each bar is an approved attributed win for one company. A blank stays off. A loss stays off. A known zero stays on. A win already on the sales file stays off. The longest bar holds the most. Nothing here posts.

Each bar is profit already approved as an attributed win this year. A win that sales already counts stays off. A blank stays off. A loss stays off. A known zero stays on the chart. Two wins for the same company are one bar. The longest bar holds the most. The chart shows the eight largest. The rest stay on the list. Nothing posts until a named person approves it.

Nothing here posts.

Attributed wins

Company	Profit
Account 2	$25.7K
Account 1	$18.4K
Account 3	$9.1K

Which campaign is over its budget

Jan 15–Dec 15, 2025. The current book. Each bar is how far a campaign is over its budget. A campaign under its budget stays off. A campaign on its budget stays as zero. A blank budget or spend stays off. The longest bar is the furthest over. Nothing here posts.

Each bar is spend minus the budget already named on that campaign. A campaign under its budget stays off. It is not drawn as a negative. A campaign that has spent its budget exactly stays as zero. A blank budget or a blank spend stays off. Two spellings of the same name are one bar. The longest bar is the furthest over. The chart shows the eight largest. The rest stay on the campaign list. Nothing posts.

Nothing here posts.

14 more campaigns are over their budget. They stay on the list.

Over budget

Campaign	Over
Field briefings flight 45	$4.4K
Field briefings flight 35	$4.0K
Field briefings flight 25	$3.7K
Field briefings flight 15	$3.4K
Account email flight 4	$3.2K
Community flight 50	$3.0K
Renewals flight 3	$2.8K
Community flight 40	$2.6K

Pipeline and approved impact

Pipeline. $10.3M. Pipeline is not on the Profit Bridge.

Approved Profit Bridge impact. $117.2K. Approved Profit Bridge impact posts only after a person approves it.

Demand follows profit. Put the spend on the slices that hold the profit. Core gets the campaigns. The tail, and any work that loses money, does not. A campaign aimed at the tail needs a written exception before it can go live.

Channel ROI. Channel ROI is profit created divided by spend. It is a reading. It is not a Profit Bridge dollar. Cost per lead is a reading too. A thin history says there are not enough wins yet.

Pipeline and approved impact. Pipeline is a leading measure. A pipeline dollar never changes the Profit Bridge. Approved Profit Bridge impact is a sourced dollar, and it posts only after a person approves it. A dollar already on Sales is kept for the ROI reading and is not added again.

Profit rank and ICP

1 of 14 slices are Core.

Source: Simplify.

ICP: Current.

Profit rank

Name	Band	Profit	Share	Trend
Maintenance pl an	Core	$228.3K	97%	Unknown
System replace ment	Middle	$2.0K	98%	Unknown
Duct cleaning	Tail	$1.9K	99%	Unknown
Thermostat inst all	Tail	$1.7K	100%	Unknown
Renewal kit	Tail	$270	100%	Unknown
Northwick Packi ng Hall 43	Tail	$37	100%	Unknown
Vesper Glass W orks 50	Tail	$32	100%	Unknown
Tern Clinic Plan t 49	Tail	$23	100%	Unknown

Target list and do not spend

12 slices are on the do-not-spend list.

Do not spend

Name	Band	Profit
Tern Clinic Plant 49	Tail	$23
Ostler Packing Hall 53	Tail	−$28
Hest Glass Works 45	Tail	−$32
Jasper Grain House 57	Tail	−$32
Vesper Glass Works 50	Tail	$32
Northwick Packing Hall 43	Tail	$37
Renewal kit	Tail	$270
Callback visit	Tail	−$1.3K

Campaign plans and the Critical Few

5 live or completed campaigns have no Critical Few objective.

Campaigns

Campaign	Status	Budget	Spend	Objective
Referral flight 1	live	$8.0K	$9.9K	No objective
Partners flight 2	live	$9.8K	$12.1K	No objective
Renewals flight 3	live	$11.5K	$14.3K	No objective
Account email flight 4	live	$13.2K	$16.4K	No objective
Field briefings flight 5	live	$15.0K	$8.2K	No objective
Paid search flight 6	live	$16.8K	$9.2K	Read profit created against spend
Paid social flight 7	live	$18.5K	$10.2K	Grow the Core accounts
Directories flight 8	live	$20.2K	Unknown	Renew the work that already earns

Channel test

2026-10. No channel names a cost-per-lead ceiling. The cost-per-lead lines use the months already on the file. A channel test stays a draft. Nothing is emailed.

Sourced and attributed

Jan 15–Dec 15, 2025. Sourced pipeline and attributed profit on the current book. Each pair is one channel. Sourced is the sourced dollar on the channel. Attributed is approved profit tied to that channel. A blank sourced dollar stays off. The longest bar is the highest dollar.

Sourced is the pipeline dollar stored on the channel. Attributed is approved profit tied to that same channel. When a sourced dollar is on the file and no win is approved, attributed shows as zero. A blank sourced dollar stays off the chart. Nothing on this chart posts.

Nothing on this chart posts.

Sourced beside attributed

Channel	Sourced	Attributed
Referral	$64.0K	$249.5K
Partners	$12.0K	$204.1K
Field briefings	Off	$12.6K
Paid social	Off	$10.1K
Renewals	Off	$8.2K
Directories	Off	$7.6K
Account email	Off	$5.0K
Tests	Off	$5.0K
Community	Off	$2.5K

Cost per lead

Last 12 months. Cost per lead by channel. Each point is spend divided by known leads. A named ceiling is a dashed line. 6 more channels stay on the file.

Each line is one channel. A point is that month's spend divided by the leads already counted. A blank lead count stays off. It is not treated as zero. A dashed line is the cost-per-lead ceiling that channel already names. A channel with no ceiling has no dashed line. Nothing here posts.

Nothing here posts.

Cost per lead

Month	Paid search	Paid social	Field briefings	Directories
2025-11	483.67	446.70	335.23	327.17
2025-12	390.11	381.70	264.57	301.10
2026-01	399.90	421.41	256	352.18
2026-02	439.91	491.14	261.48	419.46
2026-03	428.92	489.37	481.27	412.89
2026-04	512.69	577.87	281.46	471.11
2026-05	301.62	328.49	335.23	511.74
2026-06	286.88	597.03	329.98	442.84
2026-07	312.74	309.89	376.50	439.24
2026-08	323.50	306.27	408.98	419.46
2026-09	534.94	489.37	353.92	331.05
2026-10	512.77	463.39	351.08	320.39

Marketing spend by month

2025-09 to 2026-10 · marketing spend · one point per month

Each point is marketing spend recorded for that month. A month with no marketing spend stays off the line.

Nothing here posts.

Marketing spend by month

Month	Marketing spend
2025-09	$12.9K
2025-10	$14.3K
2025-11	$15.3K
2025-12	$13.3K
2026-01	$13.4K
2026-02	$13.3K
2026-03	$11.1K
2026-04	$11.2K
2026-05	$11.7K
2026-06	$10.7K
2026-07	$12.0K
2026-08	$13.7K
2026-09	$12.9K
2026-10	$14.3K

Attributed profit by month

2025-09 to 2026-10 · attributed profit · one point per month

Each point is attributed profit recorded for that month. A month with no attributed profit stays off the line.

Nothing here posts.

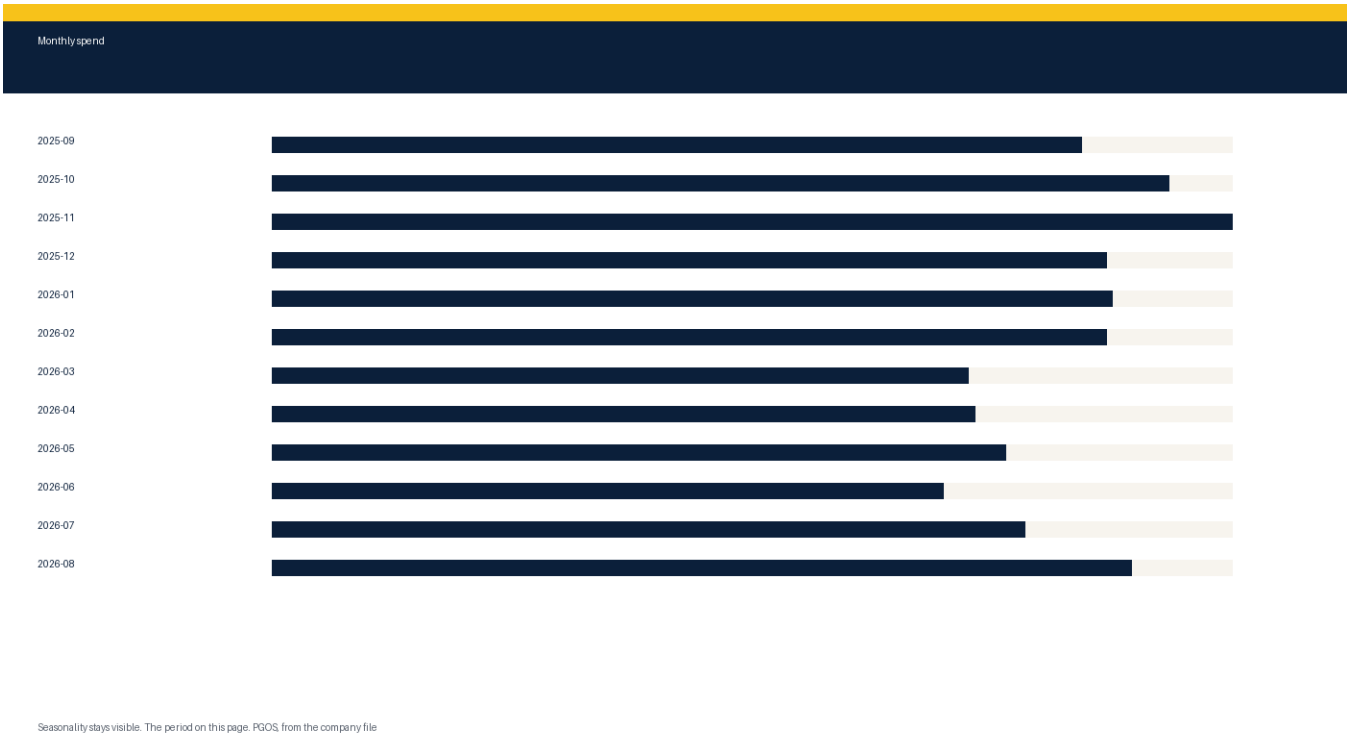
Attributed profit by month

Month	Attributed profit
2025-09	$12.6K
2025-10	$25.2K
2025-11	$37.8K
2025-12	$50.5K
2026-01	$63.1K
2026-02	$12.6K
2026-03	$25.2K
2026-04	$37.8K
2026-05	$50.5K
2026-06	$63.1K
2026-07	$12.6K
2026-08	$25.2K
2026-09	$37.8K
2026-10	$50.5K

Spend versus pipeline and profit created

Pipeline is a leading measure. ROI is a reading. Neither is the Profit Bridge line.

Core spend 81%. Tail spend 7%.



Seasonality stays visible. The period on this page. PGOS, from the company file

Seasonality stays visible. The period on this page. PGOS, from the company file

Return

Channel	Spend	Pipeline	Profit	ROI
Referral	$59.4K	$4.0M	$249.5K	4.20
Partners	$48.6K	$2.8M	$204.1K	4.20
Renewals	$23.4K	$1.2M	$8.2K	0.35
Account email	$14.4K	$672.8K	$5.0K	0.35
Field briefings	$9.0K	$385.3K	$12.6K	Not enough win s yet
Paid search	$7.2K	$266.6K	Unknown	Not enough win s yet
Paid social	$7.2K	$260.9K	$10.1K	Not enough win s yet

Channel	Spend	Pipeline	Profit	ROI
Directories	$5.4K	$222.4K	$7.6K	Not enough win s yet

Channel ROI

Company reading: 2.80.

ROI

Channel	ROI	Cost per lead
Referral	4.20	$180
Partners	4.20	$217
Renewals	0.35	$254
Account email	0.35	$294
Field briefings	Not enough wins yet	$333
Paid search	Not enough wins yet	$400
Paid social	Not enough wins yet	$424
Directories	Not enough wins yet	$386

Content calendar

Draft only. Nothing is sent.

8 items have no campaign link.

Calendar

Title	Status	Date	Owner
Note 1 for 2025-09	draft	2025-09-01	Nina Pell
Note 29 for 2025-09	published	2025-09-02	Nina Pell
Note 57 for 2025-09	in review	2025-09-03	Nina Pell
Note 15 for 2025-09	in review	2025-09-15	Leah Cho
Note 43 for 2025-09	idea	2025-09-16	Leah Cho
Note 71 for 2025-09	published	2025-09-17	Leah Cho
Note 2 for 2025-10	draft	2025-10-02	Owen Marsh
Note 30 for 2025-10	cancelled	2025-10-03	Owen Marsh

Lead hand-off

Accept rate: 75%.

22 leads are past the clock.

Leads

Company	Status	Clock
Bram Works 1	accepted	On time
Cove Yard 2	accepted	On time
Dune Plant 3	accepted	On time
Ellis Mill 4	accepted	On time
Fenn Line 5	accepted	On time
Grove Supply 6	accepted	On time
Hart Route 7	accepted	On time
Ives Field 8	accepted	On time

Weekly review

The list is built by rule. A decision does not change a dollar.

Decisions

Decision	Owner	Due
Keep the next flight on Core accounts.	Nina Pell	2026-11-20

Attributed wins

On the Profit Bridge: $117.2K.

A dollar already on Sales is attributed here and is not added again.

Wins

Company	Dollar	Where it sits
Account 1	$18.4K	On the Profit Bridge
Account 2	$25.7K	On the Profit Bridge
Account 3	$9.1K	On the Profit Bridge
Account 4	$37.7K	Attributed for ROI. Already o n Sales. Not added again.
Account 5	$7.5K	Attributed for ROI. Already o n Sales. Not added again.
Account 6	$15.1K	Attributed for ROI. Already o n Sales. Not added again.
Account 7	$22.6K	Attributed for ROI. Already o n Sales. Not added again.
Referral	$64.0K	Posted under the older sourc ed-pipeline rule. Attribute it a s a win to keep it.