Comfort Pro Heating & Air

Weekly Check-in Book

November 29, 2026

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

The 80/20 Institute

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Weekly check-in

Sample company. These aren't your numbers.

Seeded receipt: review the Quad 4 cut list in the weekly check-in.

- Scorecard: owner, goal, on track or off track
- The Critical Few: On track or Off track
- Headlines: customer and employee
- Issues: identify, discuss, solve
- To-dos: owner and due date
- Check-in: write what you decided

Solo weekly review

Same questions as the weekly check-in, worked by the owner.

- Scorecard: owner, goal, on track or off track
- The Critical Few: On track or Off track
- Headlines: customer and employee
- Issues: identify, discuss, solve
- To-dos: owner and due date
- Check-in: write what you decided

Monthly check-in

Comfort Pro Heating & Air held the month. Margin is inside the plan. Two red measures have countermeasures.

- Month result versus the EBITDA scenario
- Quad movement since the last upload
- Pricing actions that stuck
- Zero-Up items still open

Quarterly check-in

Re-forecast the next quarter. Keep the core accounts. Stop feeding the tail.

- Re-upload the latest quarter
- Refresh the roadmap from the new numbers
- Review the list, or open the plan-to-action matrix if you want it
- Set the next quarter's Critical Few