Hearthside Coaching

Process Book

2026-11-29

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

The 80/20 Institute

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Process health

Sample company. These aren't your numbers.

Health is 85 across 47 live processes. The score adds four parts: the steps and checklist are written, someone approved it, the review is current, and the latest follow answer. A yes counts 35. A partly counts 18.

This company is on Pro. The library holds 200 live processes. Change history keeps 36 versions. Video, images, and attachments are included. Drafts from notes: 60 this month. Onboarding checklists are included. The follow check and the health score stay on every plan.

As of November 16, 2026.

The library

Each row is a process on the file. A draft is not approved.

Processes

Process	Department	Owner	Status	Review	Health	Followed
Morning wave release	Warehouse	Nell Harlow	approved	2026-09-30	58	partly
Pick path for a will-call order	Warehouse	Ellis Moss	draft	2027-05-12	40	
Receive a truc k from a core vendor	Warehouse	Willa Keene	in review	2027-05-12	75	yes
Put-away of fa st movers	Warehouse	Hugo Doyle	approved	2027-05-12	100	yes
Cycle count of the A items	Warehouse	Freya Shaw	approved	2027-05-12	83	partly
Short-pick rec overy	Warehouse	Jonas Porter	approved	2027-05-12	100	yes
Damaged goo ds quarantine	Warehouse	Mina Reed	draft	2027-05-12	40	
Will-call hand off	Warehouse	Caleb Sloan	approved	2027-05-12	100	yes
Delivery route build	Delivery	Nell Harlow	approved	2027-05-12	83	partly
Proof of delive ry	Delivery	Ellis Moss	in review	2027-05-12	75	yes
Backorder pro mise	Inside sales	Willa Keene	approved	2026-12-04	100	yes
Vendor scorec ard review	Purchasing	Hugo Doyle	approved	2027-05-12	83	partly
Purchase ord er for a stock-out	Purchasing	Freya Shaw	approved	2027-05-12	83	partly
Price exceptio n on a quote	Outside sales	Jonas Porter	approved	2027-05-12	83	partly
Outside sales call plan	Outside sales	Mina Reed	approved	2027-05-12	100	yes
New account sample order	Outside sales	Caleb Sloan	approved	2027-05-12	65	no
Inside sales q uote desk	Inside sales	Nell Harlow	approved	2027-05-12	83	partly

Process	Department	Owner	Status	Review	Health	Followed
Credit hold before release	Credit	Ellis Moss	approved	2027-05-12	83	partly
Past-due collection call	Credit	Willa Keene	approved	2026-09-30	75	yes
Cash application	Finance	Hugo Doyle	approved	2026-12-04	83	partly
Customer return authorization	Customer care	Freya Shaw	approved	2027-05-12	83	partly
Special order buy	Purchasing	Jonas Porter	approved	2027-05-12	100	yes
Seasonal buy for heating season	Purchasing	Mina Reed	approved	2027-05-12	100	yes
Safety check on the dock	Warehouse	Caleb Sloan	approved	2027-05-12	100	yes
Forklift start-of-shift	Warehouse	Nell Harlow	approved	2027-05-12	83	partly
Trailer seal check	Delivery	Ellis Moss	approved	2027-05-12	100	yes
Inventory adjustment approval	Finance	Willa Keene	approved	2027-05-12	100	yes
Core item review	Purchasing	Hugo Doyle	approved	2026-09-30	75	yes
Lost customer win-back	Outside sales	Freya Shaw	approved	2026-12-04	83	partly
Branch transfer	Warehouse	Jonas Porter	approved	2027-05-12	100	yes
Counter measure for a walk-in	Inside sales	Mina Reed	approved	2027-05-12	100	yes
Freight claim	Delivery	Caleb Sloan	approved	2027-05-12	83	partly
New hire warehouse week	People	Nell Harlow	approved	2027-05-12	83	partly
Driver vehicle inspection	Delivery	Ellis Moss	approved	2027-05-12	65	no
Night replenishment	Warehouse	Willa Keene	approved	2027-05-12	100	yes
Hot order interrupt	Warehouse	Hugo Doyle	approved	2027-05-12	65	no
Vendor invoice match	Finance	Freya Shaw	approved	2026-09-30	58	partly

Process	Department	Owner	Status	Review	Health	Followed
Rebate claim close	Purchasing	Jonas Porter	approved	2026-12-04	83	partly
Showroom sample refresh	Outside sales	Mina Reed	approved	2027-05-12	100	yes
Contract price update	Inside sales	Caleb Sloan	approved	2027-05-12	100	yes
Spill on the dock	Warehouse	Nell Harlow	approved	2027-05-12	83	partly
Key account business review	Outside sales	Ellis Moss	approved	2027-05-12	83	partly
Return to vendor	Purchasing	Willa Keene	approved	2027-05-12	100	yes
Overtime approval	People	Hugo Doyle	approved	2027-05-12	100	yes
Customer pick up staging	Warehouse	Freya Shaw	approved	2027-05-12	83	partly
Month-end inventory freeze	Finance	Jonas Porter	approved	2026-09-30	75	yes
Hiring a driver	People	Mina Reed	approved	2026-12-04	100	yes

Reviews due

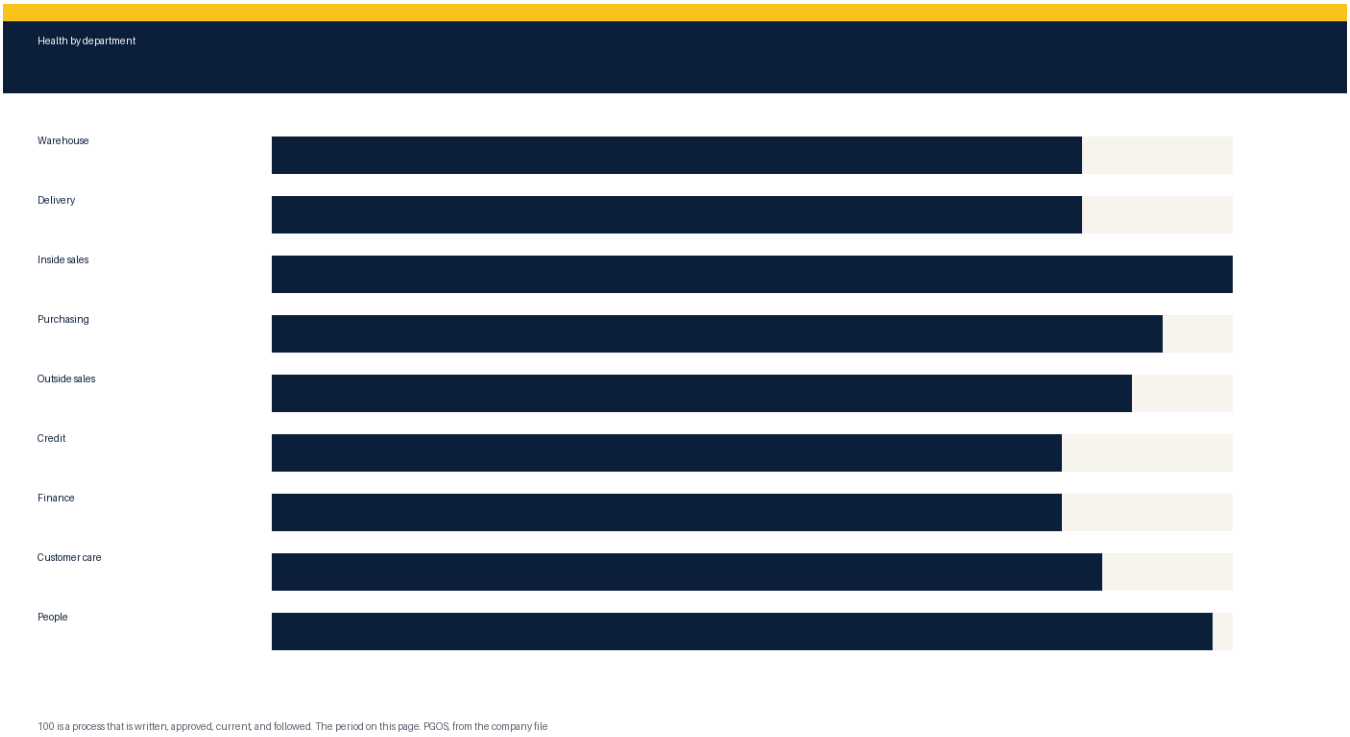
A review date inside the reminder window, or already past, is listed here.

Due reviews

Process	Owner	Review date	State
Morning wave release	Nell Harlow	2026-09-30	Overdue
Past-due collection call	Willa Keene	2026-09-30	Overdue
Core item review	Hugo Doyle	2026-09-30	Overdue
Vendor invoice match	Freya Shaw	2026-09-30	Overdue
Month-end inventory freeze	Jonas Porter	2026-09-30	Overdue
Backorder promise	Willa Keene	2026-12-04	Due soon
Cash application	Hugo Doyle	2026-12-04	Due soon
Lost customer win-back	Freya Shaw	2026-12-04	Due soon
Rebate claim close	Jonas Porter	2026-12-04	Due soon
Hiring a driver	Mina Reed	2026-12-04	Due soon

Health by department

The department score is the average health of its live processes.



100 is a process that is written, approved, current, and followed. The period on this page. PGOS, from the company file

Follow checks

Last 6 months ending November 16, 2026 · follow checks recorded · one count per month

Each point is how many follow checks were recorded in that month. A month with none is zero. This counts checks. It is not the health score.

Nothing here posts.

Jun 2026 to Nov 2026 · follow-answer health · one average per month with an answer · ending November 16, 2026. A month with no answer is left off. This is the follow part of health. It is not the four-part score.

Follow checks

Month	Follow checks
Jun 2026	23
Jul 2026	22
Aug 2026	23
Sep 2026	22
Oct 2026	0
Nov 2026	22

Follow-answer health

Month	Follow health
Jun 2026	21
Jul 2026	24
Aug 2026	25
Sep 2026	24
Nov 2026	26

Onboarding

A new hire's checklist is the processes attached to their seat.

New hires

Person	Seat	Started	Done
Iris Hale	Team lead	2026-09-08	2 of 6
Micah Quinn	Site manager	2026-06-02	4 of 6
Esme Brooks	General manager	2025-11-18	4 of 6

What is attached

47 processes name a seat.

47 processes name a measure.

47 processes name an objective.

22 follow checks are dated this month.