THE 80/20 INSTITUTE

Comfort Pro Heating & Air

Profit Bridge Book

November 29, 2026

This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026. Profit Bridge, from the company file.

The 80/20 Institute

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How to read this page

Sample company. These aren't your numbers.

Profit Bridge. Baseline $270K. Sized plan $104.1K. Actual $33.9K. Target $370K. Ahead $4,098. 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.

The bridge

Sized plan $104.1K. Counted once from sourced lines. The line total matches.

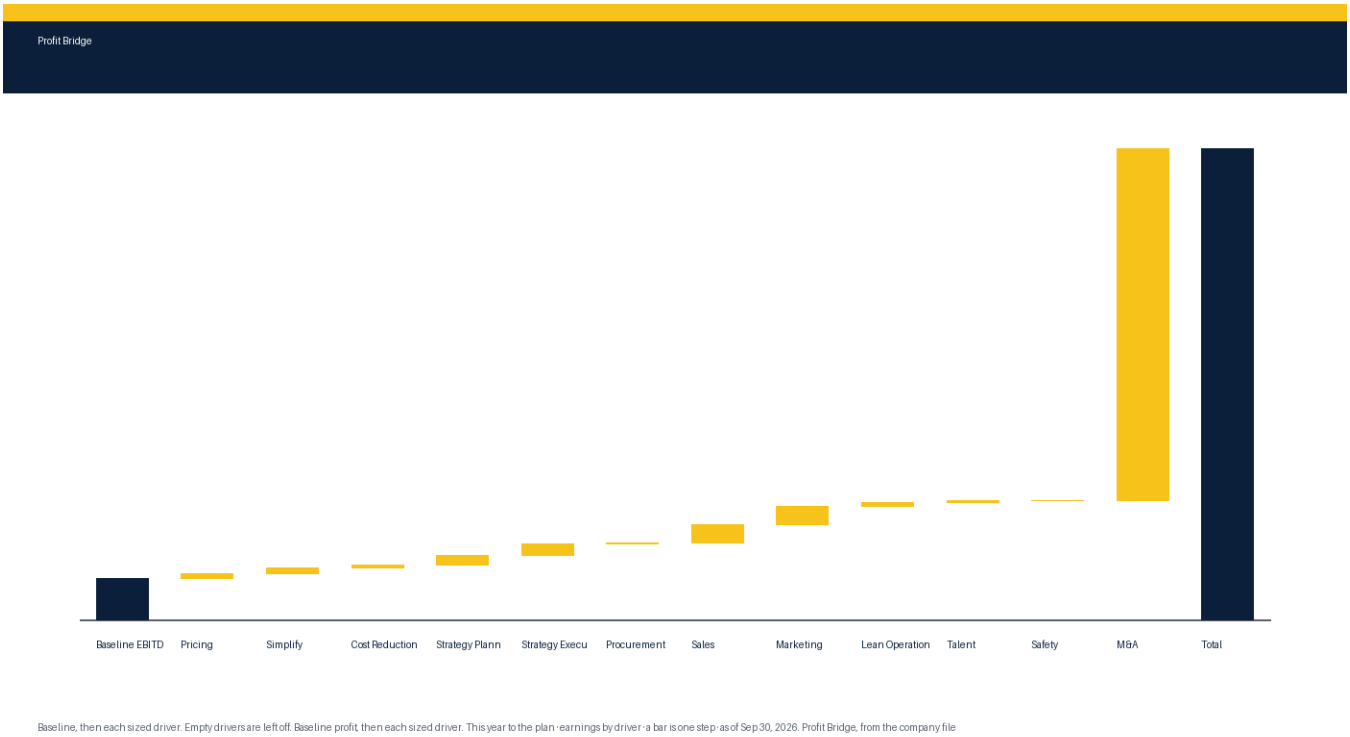
Baseline EBITDA $270K.

Sized plan $104.1K.

Recorded actual $33.9K.

This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026

Profit Bridge, from the company file



Baseline, then each sized driver. Empty drivers are left off. Baseline profit, then each sized driver. This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026. Profit Bridge, from the company file

Baseline, then each sized driver. Empty drivers are left off. Baseline profit, then each sized driver. This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026. Profit Bridge, from the company file

Profit Bridge

Source	Plan	Actual	Status
Pricing	$30.7K	Not recorded	at_risk
Simplify	$36K	Not recorded	at_risk
Cost Reduction	$21.5K	Not recorded	at_risk

Source	Plan	Actual	Status
Strategy Planning	$59.4K	$48.6K	On track
Strategy Execution	$73.8K	$49.5K	On track
Procurement	$7,296	$7,296	On track
Sales	$117.8K	Not recorded	at_risk
Marketing	$117.2K	Not recorded	at_risk
Lean Operations	$24K	$18.4K	On track
Talent	$12K	$5,419	Off track
Safety	$3,238	$2,799	On track
M&A	$2.3M	$2.2M	On track

Which item that stepped aside holds the dollar

This year. Each bar is a dollar that stepped aside. A blank stays off. A loss stays off. A known zero stays on. The longest bar holds the most. Nothing here is added or subtracted.

Each bar is a dollar that stepped aside and is not in the plan. It is not added and not subtracted. A blank stays off. It is not stored as zero. A loss stays off. A known zero stays on the chart. Two amounts for the same item are one bar. The longest bar holds the most. The chart shows the eight largest. The rest stay on the list.

This year. Each bar is a dollar that stepped aside. A blank stays off. A loss stays off. A known zero stays on. The longest bar holds the most. Nothing here is added or subtracted.

Item	Dollar
pricing · Small one-off job	$1,436
simplify · Callback visit	$1,309
simplify · Jasper Grain House 57	$32
pricing · Ostler Packing Hall 53	$28

Pricing

Plan $30.7K.

at_risk

Simplify

Plan $36K.

at_risk

Cost Reduction

Plan $21.5K.

at_risk

Strategy Planning

Plan $59.4K.

Actual $48.6K.

On track

Strategy Execution

Plan $73.8K.

Actual $49.5K.

On track

Procurement

Plan $7,296.

Actual $7,296.

On track

Sales

Plan $117.8K.

at_risk

Marketing

Plan $117.2K.

at_risk

Lean Operations

Plan $24K.

Actual $18.4K.

On track

Talent

Plan $12K.

Actual $5,419.

Off track

Safety

Plan $3,238.

Actual $2,799.

On track

M&A

Plan $2.3M.

Actual $2.2M.

On track

Initiatives

Initiatives

Initiative	Owner	Plan	Actual
Reprice maintenance plans at renewal	Sales	Not yet sized	Not recorded
Bill every callback and after-hours visit	Operations	Not yet sized	Not recorded
Set a minimum charge on small one-off jobs	Operations	Not yet sized	Not recorded
Hold the price floor on core accounts	Tasha Greene	Not yet sized	Not recorded
Visit every core account this quarter	Tasha Greene	Not yet sized	Not recorded
On-time delivery back to the goal	Mike Sorensen	Not yet sized	Not recorded
Exit the unprofitable tail	Mike Sorensen	Not yet sized	Not recorded
Gross margin holds at the year plan	Linda Park	Not yet sized	Not recorded
Receivables inside terms	Linda Park	Not yet sized	Not recorded
A backup named for each lead seat	Linda Park	Not yet sized	Not recorded
Open seats in the largest crew	Linda Park	Not yet sized	Not recorded
One new offer for core accounts	Ray Delgado	Not yet sized	Not recorded
Second quote on the top two vendors	Mike Sorensen	Not yet sized	Not recorded
Forecast only deals with a date and a way out	Tasha Greene	Not yet sized	Not recorded

Initiative	Owner	Plan	Actual
Name the wallet the l argest account buys elsewhere	Tasha Greene	Not yet sized	Not recorded
Name the step that s ets the promise date	Mike Sorensen	Not yet sized	Not recorded
Hold a weekly look a t scrap or callbacks	Mike Sorensen	Not yet sized	Not recorded
Close the month by t he eighth working da y	Linda Park	Not yet sized	Not recorded
Cash and the coven ant on the first page	Linda Park	Not yet sized	Not recorded
Finish the quarterly r eviews that are still b lank	Linda Park	Not yet sized	Not recorded
Decide the seat that has stopped growing	Linda Park	Not yet sized	Not recorded
Write the stop rule b efore the next offer i s funded	Ray Delgado	Not yet sized	Not recorded
Take dead items off t he quote form	Ray Delgado	Not yet sized	Not recorded
One-page pack sign ed for the last month	Ray Delgado	Not yet sized	Not recorded
Red scorecard rows have an owner	Ray Delgado	Not yet sized	Not recorded
Second source nam ed for the single-sou rce part	Mike Sorensen	Not yet sized	Not recorded
Walk away from the quote below the floor	Tasha Greene	Not yet sized	Not recorded