Hearthside Coaching

60-second update

November 29, 2026

The period on this page. The P&L read, from the company file.

The 80/20 Institute

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60-second update

Sample company. These aren't your numbers.

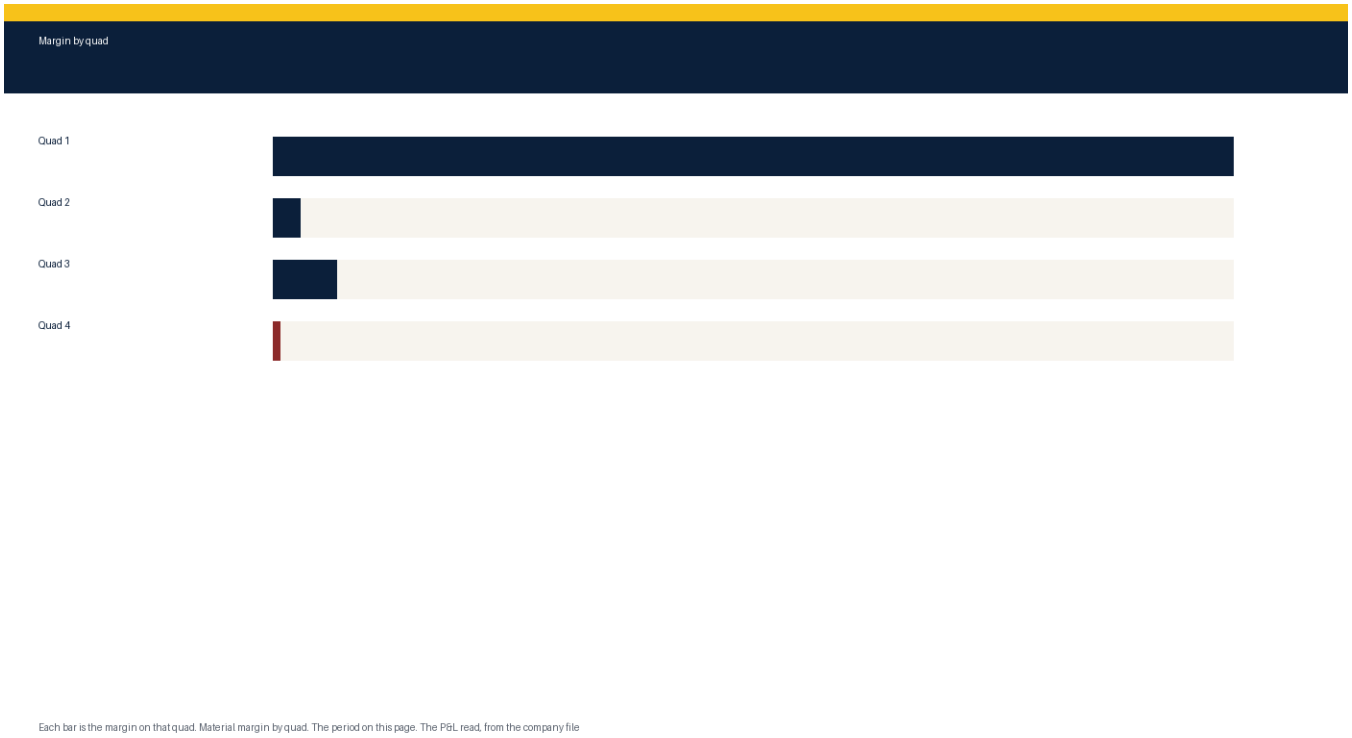
Hearthside Coaching. About $1.5M of sales in the latest full year, as of September 30, 2026, and about 8 people.

Right to Grow is 1.87.

Quad 1 is 76.7% of sales.

Quad 4 is 9.5% of sales ($142.5K).

Overhead is 26.5% of sales ($397.5K).



Each bar is the margin on that quad. Material margin by quad. The period on this page. The P&L read, from the company file

Where sales and margin sit

Quad	Meaning	Sales	Share	Margin	Margin %	Customers	Products
Quad 1	A customers buying A products	$1.2M	76.7%	$772.3K	67.1%	7	4
Quad 2	A customers buying B products	$102.8K	6.9%	$22.3K	21.7%	5	3

Quad	Meaning	Sales	Share	Margin	Margin %	Customers	Products
Quad 3	B customers buying A products	$103.7K	6.9%	$51.1K	49.3%	6	4
Quad 4	B customers buying B products	$142.5K	9.5%	−$5,700	-4.0%	8	2

The Critical Few

The Critical Few on track or done: 2 of 3.

The Critical Few

Item	Owner	Status	Target
Move discounted pa ckages to the standa rd retainer	Sales	On track	Move discounted pa ckages to the standa rd retainer
Reprice or drop one- off workshops and s peaking	Product	Off track	Reprice or drop one- off workshops and s peaking
Fill freed coach time with retained clients	Sales	On track	Fill freed coach time with retained clients
Hold the price floor o n core accounts	Jonah Hale	On track	
Visit every core acco unt this quarter	Jonah Hale	On track	
On-time delivery bac k to the goal	Ruth Adler	On track	
Exit the unprofitable tail	Ruth Adler	Off track	
Gross margin holds at the year plan	Simone Grant	On track	
Receivables inside t erms	Simone Grant	On track	
A backup named for each lead seat	Simone Grant	On track	
Open seats in the lar gest crew	Simone Grant	Off track	
One new offer for co re accounts	Nora Pell	On track	
Second quote on the top two vendors	Ruth Adler	On track	

Item	Owner	Status	Target
Forecast only deals with a date and a way out	Jonah Hale	On track	
Name the wallet the largest account buys elsewhere	Jonah Hale	Not started	
Name the step that sets the promise date	Ruth Adler	Off track	
Hold a weekly look at scrap or callbacks	Ruth Adler	On track	
Close the month by the eighth working day	Simone Grant	On track	
Cash and the covenant on the first page	Simone Grant	On track	
Finish the quarterly reviews that are still blank	Simone Grant	Not started	
Decide the seat that has stopped growing	Simone Grant	Off track	
Write the stop rule before the next offer is funded	Nora Pell	Not started	
Take dead items off the quote form	Nora Pell	On track	
One-page pack signed for the last month	Nora Pell	On track	
Red scorecard rows have an owner	Nora Pell	On track	
Second source named for the single-source part	Ruth Adler	Not started	
Walk away from the quote below the floor	Jonah Hale	Off track	

Scorecard

Measures

Measure	Owner	Goal	Current	Owner read
Revenue	Simone Grant	$375,000	$384,462	
Gross margin	Simone Grant	56.0%	56.0%	
Overhead	Simone Grant	under $99,375	$101,882	
Overhead share of sales	Simone Grant	under 26.5%	26.5%	
Right to Grow	Simone Grant	2	1.87	
Quad 4 share of sales	Simone Grant	under 10.0%	9.5%	
On-time delivery	Ruth Adler	96.0%	91.7%	
Callbacks or rework	Ruth Adler	under 5.5%	4.7%	
Quote cycle days	Jonah Hale	under 2.8 days	2.4 days	
Core accounts covered	Jonah Hale	91.0%	92.0%	
Discount beyond the floor	Jonah Hale	under 7.0%	6.0%	
Receivables past terms	Simone Grant	under 12.0%	17.0%	
Inventory or parts turns	Ruth Adler	4.4	4.18	
Overtime share	Simone Grant	under 9.0%	9.5%	
Open seats	Simone Grant	under 4	3.44	
Reviews finished	Simone Grant	92.0%	93.0%	
Voluntary turnover	Simone Grant	under 13.0%	11.2%	

Measure	Owner	Goal	Current	Owner read
Safety near misses logged	Ruth Adler	6	6.48	
Recordable incidents	Ruth Adler	under 0.5	0.71	
First-pass yield or first-time fix	Ruth Adler	93.0%	88.8%	
Vendor bids opened	Ruth Adler	2	1.9	
Single-source items	Nora Pell	under 9	7.74	
Dead catalog items	Nora Pell	under 6	5.16	
New offer pipeline	Nora Pell	1	1.08	
Price book compliance	Jonah Hale	87.0%	88.0%	
Unprofitable customers	Ruth Adler	under 7	9.94	
Unprofitable items	Nora Pell	under 4	4.24	
Month close day	Simone Grant	4.6 days to 7.6 days	7.8 days	
Cash collected this week	Simone Grant	$11,538	$33,193	
Win rate on core quotes	Jonah Hale	37.0%	40.0%	
Training hours	Simone Grant	118 hours	127 hours	
Backlog weeks	Ruth Adler	2 to 6	4	
Scrap or warranty	Ruth Adler	under $900	$1,278	
Freight given away	Simone Grant	under $600	$636	

Measure	Owner	Goal	Current	Owner read
Decisions written	Nora Pell	2	1.9	
Client renewal rate	Jonah Hale	85.0%	86.0%	
Coach days sold	Ruth Adler	63.0% to 81.0%	72.0%	
Prep days before a session	Ruth Adler	under 4.6 days	4.0 days	
Referrals this quarter	Jonah Hale	1	1.08	
Gross profit	Simone Grant	$210,000	$215,299	
Contribution after overhead	Simone Grant	$110,625	$113,416	