Hearthside Coaching

Simplify

November 29, 2026

The period on the sales file. Simplify, from the company file.

The 80/20 Institute

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Mix for the board

Sample company. These aren't your numbers.

The same standard as the board pack, for Jan 15–Dec 15, 2025.

Board pack. Earnings are $1,401 behind plan. −$1,401. Jan 15–Dec 15, 2025. The pages on this screen use the file period. They are not added again. Quads come from the invoice file. The profit and loss statement is the sum of those invoices.

Sales and margin by line, Jan 15–Dec 15, 2025.

A blank stays off. Nothing here posts.

Mix for the board

Line	Sales	Last year	Margin
Annual retained coa ching	$451,560	$418,110	$279,967
90-day coaching	$316,092	$292,677	$195,977
Leadership offsite	$225,780	$209,055	$139,983
Discounted starter p ackage	$135,468	$125,435	$83,990

How to read this page

Simplify. Planned $16.0K. Actual Not recorded. Variance Not recorded. Quad 4 share of sales 9.5%. A savings dollar is only a known loss on an exit or a starve. 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 the sales sit

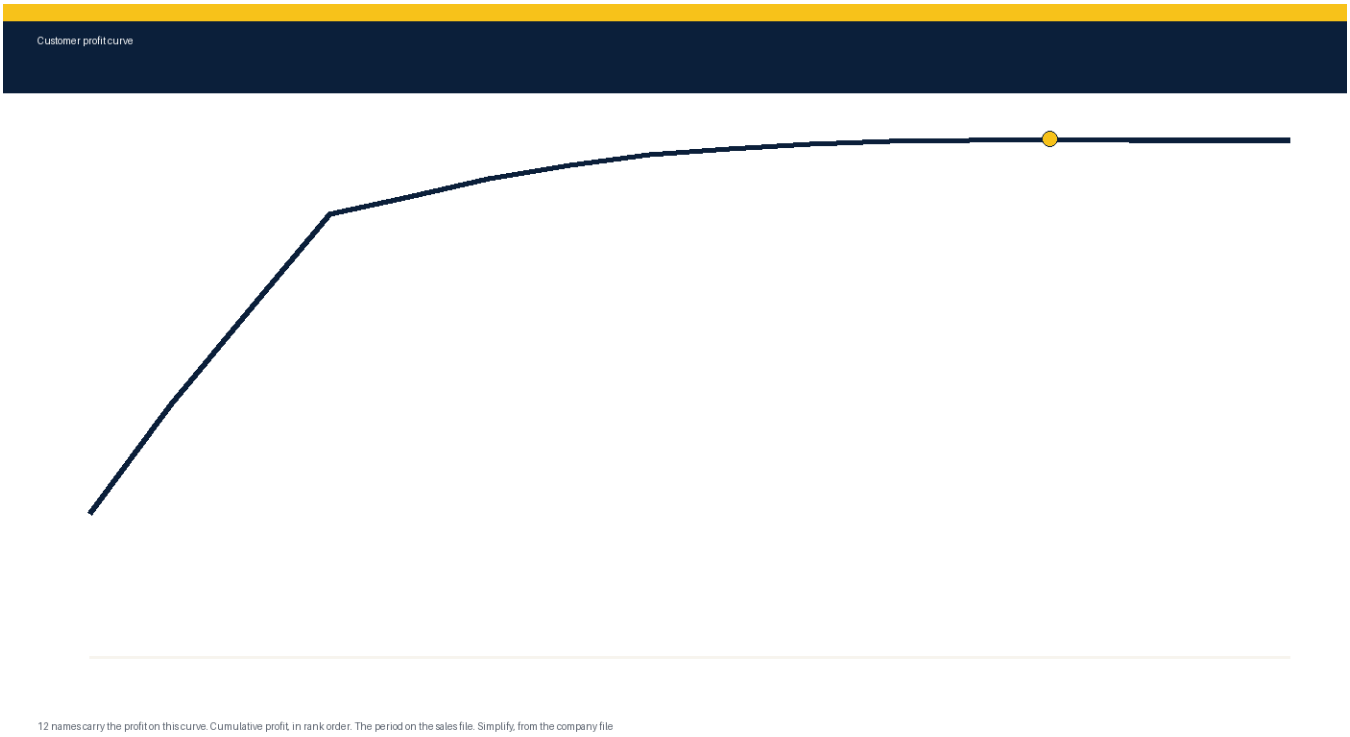
12 Quad 4 names from the uploaded lines. A savings dollar is only a known loss on an exit or a starve.

8 customers make 9.5% of your sales at -4% margin.

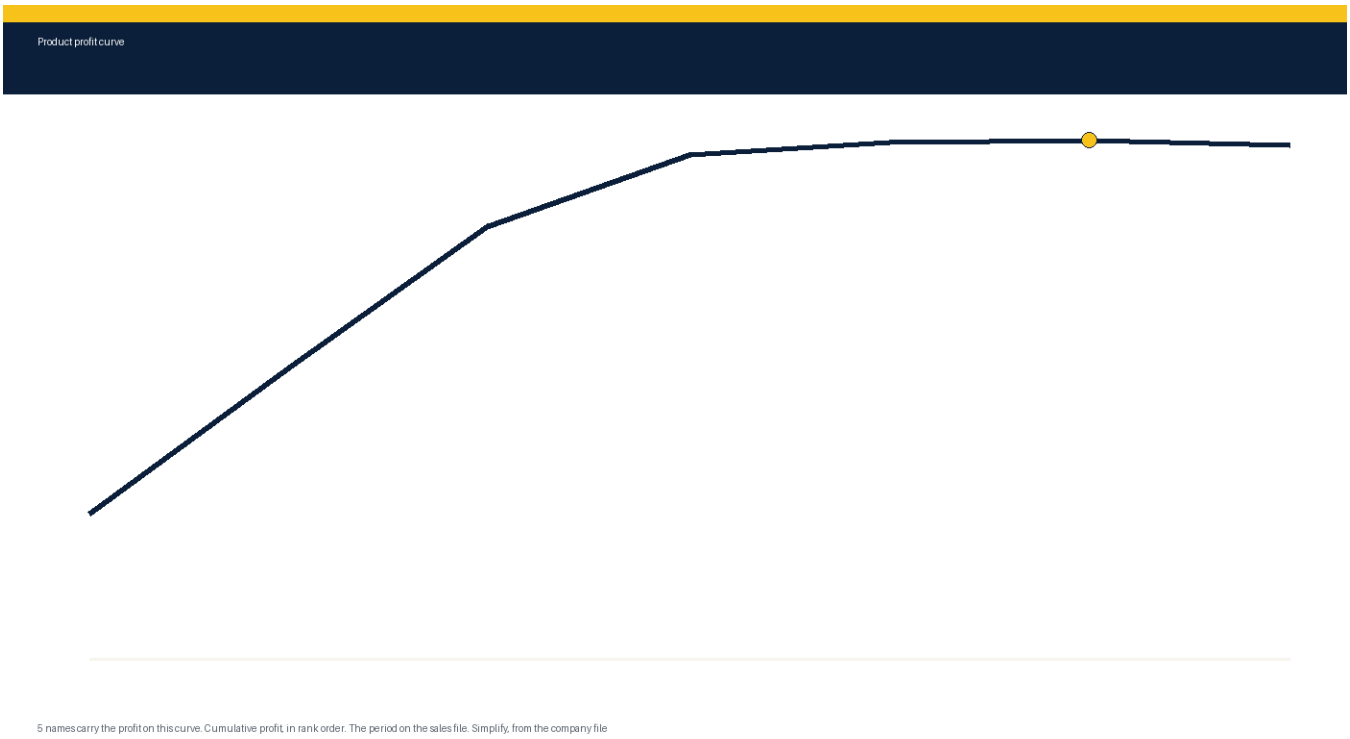
Quad grid

Quad	Sales	Share	Margin	Margin %	Customers	Products
Quad 1	$1.2M	76.7%	$772.3K	67.1%	7	4
Quad 2	$102.8K	6.9%	$22.3K	21.7%	5	3
Quad 3	$103.7K	6.9%	$51.1K	49.3%	6	4
Quad 4	$142.5K	9.5%	−$5,700	-4%	8	2

Profit curves



12 names carry the profit on this curve. Cumulative profit, in rank order. The period on the sales file. Simplify, from the company file



5 names carry the profit on this curve. Cumulative profit, in rank order. The period on the sales file.

Simplify, from the company file

Decisions

Quad 4 decisions

Name	Kind	Quad	Decision	Sales	Margin	Sized loss
Ostler Packing Hall 13	customer	Quad 4	exit	$2.9K	−$115	$115
Harlow Glass Works 15	customer	Quad 4	reprice	$4.6K	−$184	Not yet sized
Ives Facilities 16	customer	Quad 4	starve	$4.6K	−$184	$184
Yarrow Grain House 12	customer	Quad 4	keep	$5.7K	−$229	Not yet sized
Hest Glass Works 05	customer	Quad 4	exit	$27.5K	−$10.0K	$10.0K
Tern Clinic Plant 09	customer	Quad 4	reprice	$28.4K	$7.8K	Not yet sized
One-off workshop	product	Quad 4	starve	$35.8K	$7.5K	Not yet sized
Speaking engagement	product	Quad 4	keep	$106.7K	−$13.2K	Not yet sized
Quad 4 cut list	customer	Quad 4	exit	Unknown	−$5.7K	$5.7K
Annual retained coaching	product	Quad 1	reprice	$326.9K	$97.1K	Not yet sized

Which quad holds the sales

January 15, 2025 to December 15, 2025 · sales and margin by quad · as of December 15, 2025. Across those days. Sales by quad. Each bar is one quad. A quad with no sales figure stays off. A loss stays off. The longest bar holds the most sales. Nothing here posts.

Each bar is the sales already named for that quad. A blank sales figure stays off. It is not stored as zero. A loss stays off. A known zero stays on the chart. The longest bar holds the most sales. Nothing posts.

Sales by quad

Quad	Sales
Quad 1	$1.2M
Quad 4	$142.5K
Quad 3	$103.7K
Quad 2	$102.8K

Treat each quad differently

Loss stopped on the bridge: $16.0K. That dollar posts once. A reprice stays on Pricing. The assessment model is not added again.

Sign the cut list only when every Quad 4 row has a decision, a reason, and an owner, or a written note that it stays open.

Quad playbook

Quad	Move	How to treat it
Quad 1	Protect and grow	A customers buying A products. Treat them differently. Do not average them into the rest of the book, and do not put them on the cut list.
Quad 2	Move the mix	A customers buying B products. Move the volume toward an A product, or reprice the B product. The price owner still approves any price.
Quad 3	Grow the account	B customers buying A products. Grow the relationship. Do not exit an A product because the customer is small today.
Quad 4	Simplify, reprice, or exit	B customers buying B products. This is the cut list. Exit, reprice, starve, or keep. A known loss can be sized. A profit is not a savings. A reprice belongs to Pricing and is not counted here again.