Comfort Pro Heating & Air

SIOP Book

November 16, 2026

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

The 80/20 Institute

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How to read this page

Sample company. These aren't your numbers.

SIOP. Demand $4,471,623. Supply $4,201,002. Inventory $3,460,145. Gap $270,621. Forecast miss 5.5% across July 2025 through October 2026. 7 proposals. $99,772. A dollar reaches the Profit Bridge only when the owner approves a measured effect. November 2026. Quads come from the invoice file. The profit and loss statement is the sum of those invoices.

A blank stays off. Nothing here posts.

Executive pack

November 2026 for Comfort Pro Heating & Air.

Demand, supply, and inventory are one plan. A dollar in this book is proposed. It is not posted to the Profit Bridge.

Monthly cycle

This month's cycle

Step	Owner	Date	Status	Decision
Product and portfolio review	Ray Delgado	2026-11-03	Decided	Keep emergency call and cooling plant as the core. Leave electrical in the tail.
Demand plan	Tasha Greene	2026-11-05	Decided	Hold emergency-call demand to the crew already on the November roster.
Supply and capacity plan	Mike Sorensen	2026-11-07	Open	Waiting on the owner.
Pre-SIOP financial and inventory reconciliation	Linda Park	2026-11-13	Late	Waiting on the owner.
Executive SIOP sign-off	Ray Delgado	2026-11-18	Held	Waiting on the owner.

Eighteen-month plan

Consensus plan by product family. Units and dollars.

Demand, supply, and inventory

Family	Month	Demand units	Demand $	Supply units	Supply $	Inventory units	Inventory $
Emergency call	November 2026	433	$540,384	433	$540,384	317	$395,616
Emergency call	December 2026	417	$520,416	417	$520,416	317	$395,616
Emergency call	January 2027	385	$480,480	385	$480,480	317	$395,616
Emergency call	February 2027	398	$496,704	398	$496,704	317	$395,616
Emergency call	March 2027	420	$524,160	420	$524,160	317	$395,616
Emergency call	April 2027	438	$546,624	438	$546,624	317	$395,616
Emergency call	May 2027	451	$562,848	451	$562,848	317	$395,616
Emergency call	June 2027	435	$542,880	435	$542,880	317	$395,616
Emergency call	July 2027	432	$539,136	432	$539,136	317	$395,616
Emergency call	August 2027	428	$534,144	428	$534,144	317	$395,616
Emergency call	September 2027	438	$546,624	438	$546,624	317	$395,616
Emergency call	October 2027	451	$562,848	451	$562,848	317	$395,616
Emergency call	November 2027	418	$521,664	418	$521,664	317	$395,616
Emergency call	December 2027	402	$501,696	402	$501,696	317	$395,616
Emergency call	January 2028	395	$492,960	395	$492,960	317	$395,616
Emergency call	February 2028	408	$509,184	408	$509,184	317	$395,616
Emergency call	March 2028	430	$536,640	430	$536,640	317	$395,616
Emergency call	April 2028	423	$527,904	423	$527,904	317	$395,616

Family	Month	Demand units	Demand $	Supply units	Supply $	Inventory units	Inventory $
Cooling plant	November 2026	188	$1,276,708	188	$1,276,708	171	$1,161,261
Cooling plant	December 2026	170	$1,154,470	170	$1,154,470	171	$1,161,261
Cooling plant	January 2027	167	$1,134,097	167	$1,134,097	171	$1,161,261
Cooling plant	February 2027	173	$1,174,843	173	$1,174,843	171	$1,161,261
Cooling plant	March 2027	182	$1,235,962	182	$1,235,962	171	$1,161,261
Cooling plant	April 2027	190	$1,290,290	190	$1,290,290	171	$1,161,261
Cooling plant	May 2027	185	$1,256,335	185	$1,256,335	171	$1,161,261
Cooling plant	June 2027	189	$1,283,499	189	$1,283,499	171	$1,161,261
Cooling plant	July 2027	187	$1,269,917	187	$1,269,917	171	$1,161,261
Cooling plant	August 2027	186	$1,263,126	186	$1,263,126	171	$1,161,261
Cooling plant	September 2027	190	$1,290,290	190	$1,290,290	171	$1,161,261
Cooling plant	October 2027	185	$1,256,335	185	$1,256,335	171	$1,161,261
Cooling plant	November 2027	181	$1,229,171	181	$1,229,171	171	$1,161,261
Cooling plant	December 2027	175	$1,188,425	175	$1,188,425	171	$1,161,261
Cooling plant	January 2028	171	$1,161,261	171	$1,161,261	171	$1,161,261
Cooling plant	February 2028	177	$1,202,007	177	$1,202,007	171	$1,161,261
Cooling plant	March 2028	176	$1,195,216	176	$1,195,216	171	$1,161,261
Cooling plant	April 2028	183	$1,242,753	183	$1,242,753	171	$1,161,261
Air handling	November 2026	259	$782,957	208	$628,784	201	$607,623
Air handling	December 2026	249	$752,727	208	$628,784	160	$483,680

Family	Month	Demand units	Demand $	Supply units	Supply $	Inventory units	Inventory $
Air handling	January 2027	244	$737,612	208	$628,784	124	$374,852
Air handling	February 2027	253	$764,819	208	$628,784	79	$238,817
Air handling	March 2027	266	$804,118	208	$628,784	21	$63,483
Air handling	April 2027	262	$792,026	208	$628,784	0	$0
Air handling	May 2027	270	$816,210	208	$628,784	0	$0
Air handling	June 2027	276	$834,348	208	$628,784	0	$0
Air handling	July 2027	274	$828,302	208	$628,784	0	$0
Air handling	August 2027	271	$819,233	208	$628,784	0	$0
Air handling	September 2027	262	$792,026	208	$628,784	0	$0
Air handling	October 2027	270	$816,210	208	$628,784	0	$0
Air handling	November 2027	265	$801,095	208	$628,784	0	$0
Air handling	December 2027	255	$770,865	208	$628,784	0	$0
Air handling	January 2028	251	$758,773	208	$628,784	0	$0
Air handling	February 2028	243	$734,589	208	$628,784	0	$0
Air handling	March 2028	257	$776,911	208	$628,784	0	$0
Air handling	April 2028	268	$810,164	208	$628,784	0	$0
Controls	November 2026	141	$703,590	141	$703,590	101	$503,990
Controls	December 2026	136	$678,640	136	$678,640	101	$503,990
Controls	January 2027	133	$663,670	133	$663,670	101	$503,990
Controls	February 2027	138	$688,620	138	$688,620	101	$503,990
Controls	March 2027	137	$683,630	137	$683,630	101	$503,990
Controls	April 2027	143	$713,570	143	$713,570	101	$503,990
Controls	May 2027	147	$733,530	147	$733,530	101	$503,990
Controls	June 2027	150	$748,500	150	$748,500	101	$503,990
Controls	July 2027	149	$743,510	149	$743,510	101	$503,990

Family	Month	Demand units	Demand $	Supply units	Supply $	Inventory units	Inventory $
Controls	August 2027	139	$693,610	139	$693,610	101	$503,990
Controls	September 2027	143	$713,570	143	$713,570	101	$503,990
Controls	October 2027	147	$733,530	147	$733,530	101	$503,990
Controls	November 2027	144	$718,560	144	$718,560	101	$503,990
Controls	December 2027	139	$693,610	139	$693,610	101	$503,990
Controls	January 2028	128	$638,720	128	$638,720	101	$503,990
Controls	February 2028	133	$663,670	133	$663,670	101	$503,990
Controls	March 2028	140	$698,600	140	$698,600	101	$503,990
Controls	April 2028	146	$728,540	146	$728,540	101	$503,990
Preventive contract	November 2026	92	$446,384	68	$329,936	40	$194,080
Preventive contract	December 2026	88	$426,976	68	$329,936	20	$97,040
Preventive contract	January 2027	87	$422,124	68	$329,936	1	$4,852
Preventive contract	February 2027	84	$407,568	68	$329,936	0	$0
Preventive contract	March 2027	89	$431,828	68	$329,936	0	$0
Preventive contract	April 2027	93	$451,236	68	$329,936	0	$0
Preventive contract	May 2027	96	$465,792	68	$329,936	0	$0
Preventive contract	June 2027	98	$475,496	68	$329,936	0	$0
Preventive contract	July 2027	91	$441,532	68	$329,936	0	$0
Preventive contract	August 2027	91	$441,532	68	$329,936	0	$0
Preventive contract	September 2027	93	$451,236	68	$329,936	0	$0
Preventive contract	October 2027	96	$465,792	68	$329,936	0	$0

Family	Month	Demand units	Demand $	Supply units	Supply $	Inventory units	Inventory $
Preventive contract	November 2027	94	$456,088	68	$329,936	0	$0
Preventive contract	December 2027	85	$412,420	68	$329,936	0	$0
Preventive contract	January 2028	84	$407,568	68	$329,936	0	$0
Preventive contract	February 2028	86	$417,272	68	$329,936	0	$0
Preventive contract	March 2028	91	$441,532	68	$329,936	0	$0
Preventive contract	April 2028	95	$460,940	68	$329,936	0	$0
Electrical	November 2026	320	$721,600	320	$721,600	265	$597,575
Electrical	December 2026	308	$694,540	308	$694,540	265	$597,575
Electrical	January 2027	284	$640,420	284	$640,420	265	$597,575
Electrical	February 2027	294	$662,970	294	$662,970	265	$597,575
Electrical	March 2027	310	$699,050	310	$699,050	265	$597,575
Electrical	April 2027	323	$728,365	323	$728,365	265	$597,575
Electrical	May 2027	333	$750,915	333	$750,915	265	$597,575
Electrical	June 2027	321	$723,855	321	$723,855	265	$597,575
Electrical	July 2027	319	$719,345	319	$719,345	265	$597,575
Electrical	August 2027	316	$712,580	316	$712,580	265	$597,575
Electrical	September 2027	323	$728,365	323	$728,365	265	$597,575
Electrical	October 2027	333	$750,915	333	$750,915	265	$597,575
Electrical	November 2027	309	$696,795	309	$696,795	265	$597,575
Electrical	December 2027	297	$669,735	297	$669,735	265	$597,575
Electrical	January 2028	291	$656,205	291	$656,205	265	$597,575
Electrical	February 2028	301	$678,755	301	$678,755	265	$597,575

Family	Month	Demand units	Demand $	Supply units	Supply $	Inventory units	Inventory $
Electrical	March 2028	317	$714,835	317	$714,835	265	$597,575
Electrical	April 2028	312	$703,560	312	$703,560	265	$597,575

Forecast accuracy and bias

Accuracy is the average absolute miss. Bias above zero means the forecast ran high.

Trailing closed months

Family	Months	Accuracy miss	Bias
All families	96	5.5%	1.4%
Emergency call	16	7.9%	7.9%
Cooling plant	16	6.1%	-6.1%
Air handling	16	3.9%	4.0%
Controls	16	2.9%	-2.8%
Preventive contract	16	7.0%	7.0%
Electrical	16	5.1%	-5.1%

Capacity

Constraints

Constraint	Family	Demand	Limit	Status	Note
Crew hours for emergency call	Emergency call	433	588	Open	Emergency call has room this month.
Crew hours for cooling plant	Cooling plant	188	207	Tight	Cooling plant is inside the limit, with little room left.
Crew hours for air handling	Air handling	259	208	Over	Air handling demand is past the limit. The buy plan cannot close it alone.
Crew hours for controls	Controls	141	210	Open	Controls has room this month.
Crew hours for preventive contract	Preventive contract	92	68	Over	Preventive contract demand is past the limit. The buy plan cannot close it alone.
Crew hours for electrical	Electrical	320	347	Tight	Electrical is inside the limit, with little room left.

Plan, actual, and capacity

November 2025 through October 2026. Each point is the demand plan, the actual demand, and the capacity limit.

Nothing here posts.

Closed months

Month	Plan	Actual	Capacity
November 2025	$4,420,390	$4,449,665	$4,928,666
December 2025	$4,162,416	$4,201,477	$4,928,666
January 2026	$4,079,460	$4,105,057	$4,928,666
February 2026	$4,184,991	$4,203,357	$4,928,666
March 2026	$4,365,989	$4,381,156	$4,928,666
April 2026	$4,467,136	$4,495,163	$4,928,666
May 2026	$4,520,733	$4,564,328	$4,928,666
June 2026	$4,608,178	$4,632,209	$4,928,666
July 2026	$4,534,412	$4,552,172	$4,928,666
August 2026	$4,457,704	$4,471,623	$4,928,666
September 2026	$4,467,136	$4,495,163	$4,928,666
October 2026	$4,520,733	$4,564,328	$4,928,666

Buy plan

Suppliers are the names already on the Procurement file.

Buys

Family	Item	Supplier	Units	Dollars	Need by	Status
Emergency call	Emergency call replenishment	Halden Parts Desk	47	$23,462	2026-12-15	Released
Cooling plant	Cooling plant replenishment	Orchard Fleet Fuel	17	$46,179	2027-01-05	Draft
Air handling	Air handling replenishment	Plover Subcontract	128	$154,778	2027-01-26	Held
Controls	Controls replenishment	Quin Steel Fasteners	17	$33,932	2027-02-16	Released
Preventive contract	Preventive contract replenishment	Ridge Uniforms	63	$122,270	2027-03-09	Draft
Electrical	Electrical replenishment	Sable Tools	28	$25,256	2027-03-30	Held
Emergency call	Emergency call cover stock	Tern Waste Haul	29	$14,477	2027-02-15	Held
Cooling plant	Cooling plant cover stock	Umber Insurance Desk	10	$27,164	2027-02-15	Draft

Scenarios

Gap is demand dollars minus supply dollars across the eighteen months.

Gap by family

Family	Consensus gap	Upside gap	Constrained gap
Emergency call	$0	$0	$0
Cooling plant	$0	$162,984	$95,074
Air handling	$2,874,873	$4,573,799	$4,017,567
Controls	$0	$0	$0
Preventive contract	$1,984,468	$2,935,460	$2,595,820
Electrical	$0	$299,915	$218,735

Largest gap

Eighteen months. Each bar is demand minus supply for one scenario. A surplus stays off. A blank stays off. A known zero stays on. The longest bar is the largest gap. Nothing here posts.

Each bar is demand minus supply over eighteen months. A surplus, where supply is larger than demand, stays off. A blank stays off. A known zero stays on the chart. Two scenarios with the same name stay apart. The longest bar is the largest gap. The chart shows the eight largest. The rest stay on the list. Nothing posts.

Nothing here posts.

Unmet demand

Scenario	Gap
Upside	$7,972,158
Constrained	$6,927,196
Consensus	$4,859,341

Decisions

Decisions

Decision	Owner	Date	Status	Proposed $	Follow-through
Keep emergency call staffed to the hours already sold.	Ray Delgado	2025-09-18	Kept	$4,992	Not filed
Review cooling plant before the executive meeting.	Tasha Greene	2025-10-18	Open		Not filed
Move the air handling change to the next month.	Mike Sorensen	2025-11-18	Slipped	$18,138	Not filed
Leave controls on the current plan.	Linda Park	2025-12-18	Declined		Not filed
Keep preventive contract staffed to the hours already sold.	Ray Delgado	2026-01-18	Kept	$24,260	Not filed
Review electrical before the executive meeting.	Ray Delgado	2026-02-18	Open		Not filed
Move the emergency call change to the next month.	Tasha Greene	2026-03-18	Slipped	$4,992	Not filed

Decision	Owner	Date	Status	Proposed $	Follow-through
Leave cooling plant on the current plan.	Mike Sorensen	2026-04-18	Declined		Not filed
Keep air handling staffed to the hours already sold.	Linda Park	2026-05-18	Kept	$18,138	Not filed
Review controls before the executive meeting.	Ray Delgado	2026-06-18	Open		Not filed
Move the preventive contract change to the next month.	Ray Delgado	2026-07-18	Slipped	$24,260	Not filed
Leave electrical on the current plan.	Tasha Greene	2026-08-18	Declined		Not filed
Keep emergency call staffed to the hours already sold.	Mike Sorensen	2026-09-18	Kept	$4,992	Not filed
Review cooling plant before the executive meeting.	Linda Park	2026-10-18	Open		Not filed

Profit Bridge proposals

These amounts are proposed. Nothing in this section is posted to the Profit Bridge.

Proposals

Decision	Amount	Profit Bridge
Keep emergency call staffed to the hours already sold.	$4,992	Not posted
Move the air handling change to the next month.	$18,138	Not posted
Keep preventive contract staffed to the hours already sold.	$24,260	Not posted
Move the emergency call change to the next month.	$4,992	Not posted
Keep air handling staffed to the hours already sold.	$18,138	Not posted
Move the preventive contract change to the next month.	$24,260	Not posted
Keep emergency call staffed to the hours already sold.	$4,992	Not posted

Product and portfolio review

Quad 1 is the core volume. Quad 3 and Quad 4 are the tail.

Families by quad

Family	Quad	Role	Units	Dollars	Share
Cooling plant	Quad 1	Core volume	188	$1,276,708	28.6%
Air handling	Quad 1	Core volume	259	$782,957	17.5%
Electrical	Quad 1	Core volume	320	$721,600	16.1%
Controls	Quad 1	Core volume	141	$703,590	15.7%
Emergency call	Quad 1	Core volume	433	$540,384	12.1%
Preventive contract	Quad 4	Tail complexity	92	$446,384	10.0%

Launches and sunsets

Family	Move	Effect	Owner
Controls	Launch	Controls retrofit is the launch. It needs crew time that emergency call already uses.	Ray Delgado
Electrical	Sunset	Electrical one-off work is the sunset. It adds calls and little margin.	Ray Delgado

Which quad holds the volume

The period on this page. The current cycle. Each bar is the volume dollars in one quad. A quad with no families stays off. A loss stays off. A known zero stays on. The longest bar holds the most. Nothing here posts.

Quad 1 holds $4,025,239. Quad 4 holds $446,384. The table appears when three quads have volume.

Each bar is the volume dollars already rolled into that quad. A quad with no families 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. Nothing posts.

Demand plan

Unconstrained demand beside consensus

Family	Quad	Consensus units	Consensus $	Unconstrained units	Unconstrained $
Emergency call	Quad 1	433	$540,384	485	$605,280
Cooling plant	Quad 1	188	$1,276,708	211	$1,432,901
Air handling	Quad 1	259	$782,957	290	$876,670
Controls	Quad 1	141	$703,590	158	$788,420
Preventive contract	Quad 4	92	$446,384	103	$499,756
Electrical	Quad 1	320	$721,600	358	$807,290

Customer demand signals

Customer	Family	Direction	Signal
Bramble Facilities 01	Emergency call	up	Pull the December emergency-call cover forward one week.
Pellam Grain House 01	Cooling plant	flat	Cooling-plant hours stay on the contracts already signed.
Northwick Packing Hall 01	Electrical	down	Hold the electrical tail. Two campuses pa used the one-off list.

Assumptions

Assumption	Owner	Date
November keeps the price already on the invoice.	Linda Park	2026-11-04
No new line or crew is added inside this month.	Mike Sorensen	2026-11-07

Assumption	Owner	Date
The forecast moves only wh en a named customer signal is written down.	Tasha Greene	2026-11-05

Pre-SIOP reconciliation

Inventory turns: 15.5.

Days on hand: 23.

Cash tied up in Quad 3 and Quad 4 this month: $194,080.

On time in full, from shipped units against demand: 100.0%.

This month's working-capital pictures

Picture	Ending inventory	Gap
Consensus	$3,460,145	$270,621
Upside	$3,261,091	$469,675
Constrained	$3,331,076	$399,690

Executive sign-off

Each row is a timestamped receipt. An empty month is left out.

Receipts

Date	Owner	Signed at	What was signed
2026-10-20	Ray Delgado	2026-10-20T15:00:00+00:00	October demand, supply, and inventory were signed as one plan.

Operating playbook

Rank product families by volume. The few that hold about 80 percent are Quad 1, the core. Quad 3 and Quad 4 are the tail: more codes, more setups, and cash that sits still. Name each launch and each sunset before anyone forecasts the month.

Write the unconstrained forecast by family and by quad. Then read the miss and the bias. A forecast that runs high builds stock. A forecast that runs low misses the customer. Log the assumption and the customer signal that moved the number.

Put demand on the plant, the line, the crew, or the warehouse. Utilization past the limit is a bottleneck. Labor hours and supplier lead time are constraints. The choices are make, buy, or shift the work.

Set demand beside supply. Read the gap, the turns, the days on hand, and the cash tied up in Quad 3 and Quad 4. On time in full is a trade against that cash. Pick the picture the company can fund.

One owner signs the month: demand, supply, and inventory, together. Decisions and open issues leave with a name and a date. The receipt is the record. A dollar reaches the Profit Bridge only when that owner approves a measured effect on throughput, working capital, or service level.

- Week 1. Product and portfolio review. Confirm Quad 1 and the tail. Name launches and sunsets.
- Week 1. Demand review. Lock the unconstrained forecast, the miss, and the bias.
- Week 2. Supply review. Name the bottleneck, the labor limit, and the supplier lead time.
- Week 2. Pre-meeting reconciliation. Close the gap, the days on hand, and the cash.
- Week 3. Executive meeting. Sign the one plan. File the issues. Leave with owners and dates.