Comfort Pro Heating & Air

Strategy Planning Book

November 29, 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.

Strategy Planning. The plan names $59.4K a year. The earnings lift from the price floor and the tail exit. It is not the assessment model. Planned $59.4K. Actual $48.6K. Variance −$10.8K. The Locked Number is a different number and is not posted. The year's number is saved only when you confirm it. 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 you play

Where you play: Core accounts buying the core line.

What you stop: Special prices and one-off work below cost.

The earnings lift from the price floor and the tail exit. It is not the assessment model.

Week Zero

Locked Number $370.0K by 2026-01-15. It is not posted.

The decision this plan must inform: Lift earnings at Comfort Pro Heating & Air without buying revenue in the tail..

Verdict ledger

Funded, Deferred, or Declined. A Funded verdict posts no dollar.

Verdicts

Candidate	Verdict	Rationale or year
Core account coverage	funded	
Tail cleanup	funded	
A new city the company doe s not serve	declined	

One-Page Business Plan

A simpler service company, with the tail cleaned up.

The budget is locked.

Signature sheet

Where we are: Comfort Pro Heating & Air makes its profit in a minority of accounts and items.

The number we commit to: The Locked Number is the aim. It is not a posted dollar.

The strategy that gets us there: Hold the core. Clean the tail. Bid the concentrated spend.

The system that protects it: Weekly check-in, monthly bowler, quarterly review.

What we need from you: Back the price floor when a large account pushes.

Signing adds no dollar.

Situation Assessment

Worked for Comfort Pro Heating & Air.

Status: Done.

Strategic Framework

Worked for Comfort Pro Heating & Air.

Status: Done.

Business Plan

Worked for Comfort Pro Heating & Air.

Status: In progress.

Deployment

Worked for Comfort Pro Heating & Air.

Status: In progress.

Cadence

Worked for Comfort Pro Heating & Air.

Status: Done.

Boardroom

Worked for Comfort Pro Heating & Air.

Status: In progress.

How the quarter runs

The Strategy Management Process has six phases. Situation Assessment writes the facts and the Locked Number, the earnings the board expects by a date. That number is the aim. It is not posted on the Profit Bridge.

The Strategic Framework chooses where the company plays and what it stops. The Business Plan locks one budget. Deployment hands the signed plan to the people who run it.

Cadence sets the weekly check-in, the monthly review, and the quarterly review. The Boardroom signs the reading twice. A draft can suggest words. It cannot sign, post a dollar, or name an owner.

Line of sight

Locked Number $370.0K by 2026-01-15. This is the aim. It is not a Profit Bridge dollar.

A simpler service company, with the tail cleaned up.

Grow everywhere.

This year: Hold the core and exit the unprofitable tail.

This year: Collect cash and close the month on time.

This year: Sales: Raise pocket price on the three deepest discount deals.

This year: Sales: Cover every core account at least once a month.

This year: Sales: Stop quoting the long tail below the floor.

This year: Sales: Win two new core-line accounts without a special discount.

This year: Sales: Cut the average quote turnaround to two days.

This year: Operations: Bring on-time delivery back above the goal.

This year: Operations: Clear the unprofitable tail from the active book.

This year: Operations: Shorten the longest service or make cycle.

This year: Operations: Hold a weekly look at scrap, rework, or callbacks.

This year: Finance: Hold gross margin on the $3M book.

This year: Finance: Collect the oldest receivables every Monday.

This year: Finance: Keep overhead from growing faster than sales.

This year: Finance: Close the month by the eighth working day.

This year: People: Name a backup for every lead seat.

This year: People: Fill the open technician or operator seats.

This year: People: Finish the quarterly reviews that are still blank.

This year: People: Cut voluntary turnover in the largest department.

This year: Product: Retire two catalog items that lose money.

This year: Product: Launch one offer the core accounts already asked for.

This year: Product: Put a floor on the custom or one-off work.

This year: Product: Publish the price book the sellers actually use.

This year: Operations: Bid the two vendors who hold most of the spend.

This year: Sales: Write the win rate by quad before the next forecast.

This year: Sales: Log every open deal with a date and a way out.

This year: Operations: Name the constraint that sets the promise date.

This year: Operations: Close the oldest near miss with a changed step.

This year: Finance: Put cash and the covenant on the first page of the pack.

This year: Finance: Split overhead into the few accounts that actually move.

This year: People: End the talent review with a hire, a move, or a backup.

This year: People: Decide what happens to the seat that has stopped growing.

This year: Product: Write the stop rule before the next offer is funded.

This year: Product: Take dead items off the quote form this quarter.

This year: Ceo: Keep the weekly list to the vital few.

This year: Ceo: Read the red rows before the check-in, not after.

From the aim to this week

Charter	Owner	Milestone	Measure	Weekly to-do
Reprice the three deepest discounts	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	Core accounts covered	
Monthly call plan for core accounts	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	Price floor held	

Charter	Owner	Milestone	Measure	Weekly to-do
Walk-away rule on one-off quotes	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	New core accounts	
New-account list for the core line	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	On-time delivery	
Quote desk standard reply	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	Unprofitable customers	
On-time recovery on the late jobs	Mike Sorensen	Review it in the monthly meeting. Write the countermeasure if it is red.	Callbacks or rework	
Tail-customer exit list	Mike Sorensen	Review it in the monthly meeting. Write the countermeasure if it is red.	Gross margin dollars	
Callback or rework review	Mike Sorensen	Review it in the monthly meeting. Write the countermeasure if it is red.	Receivables past terms	
Overtime cap on the largest crew	Mike Sorensen	Review it in the monthly meeting. Write the countermeasure if it is red.	Month close day	

Charter	Owner	Milestone	Measure	Weekly to-do
Vendor bid on t he top spend	Mike Sorensen	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Open seats	
Second source f or the single-so urce part	Mike Sorensen	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Reviews finishe d	
Weekly cash an d receivables	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Backups named	
Overhead freez e on open reqs	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Dead catalog ite ms	
Month-close ch ecklist	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	New offer pipeli ne	
Discount leakag e report	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Price book com pliance	
Backup chart fo r lead seats	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Vendor bids op ened	

Charter	Owner	Milestone	Measure	Weekly to-do
Hiring plan for t he open crew	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Core accounts c overed	
Quarterly revie ws finished	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Price floor held	
Stay interviews i n the largest de partment	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	New core accou nts	
End two money- losing items	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	On-time deliver y	
New offer the c ore accounts as ked for	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Unprofitable cus tomers	
Floor price on c ustom work	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Callbacks or re work	
Price book the s ellers use	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	Gross margin d ollars	

Charter	Owner	Milestone	Measure	Weekly to-do
Catalog cleanup of dead items	Ray Delgado	Review it in the monthly meeting. Write the countermeasure if it is red.	Receivables past terms	
Freight allowance rules	Mike Sorensen	Review it in the monthly meeting. Write the countermeasure if it is red.	Month close day	
Contract renewal calendar	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	Open seats	
Inventory or parts turns	Linda Park	Review it in the monthly meeting. Write the countermeasure if it is red.	Reviews finished	
Trainer for the new hires	Linda Park	Review it in the monthly meeting. Write the countermeasure if it is red.	Backups named	
Win rate by quad on the forecast	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	Dead catalog items	
Wallet map for the ten largest accounts	Tasha Greene	Review it in the monthly meeting. Write the countermeasure if it is red.	New offer pipeline	

Charter	Owner	Milestone	Measure	Weekly to-do
Constraint on th e promise date	Mike Sorensen	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	
Second source f or the part that stops the line	Mike Sorensen	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	
Covenant and c ash on page on e	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	
Overhead acco unts that do not serve the core	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	
Talent review th at ends in a dec ision	Linda Park	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	
Stop rule written before the next offer	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	
Dead items off t he quote form	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	

Charter	Owner	Milestone	Measure	Weekly to-do
One-page pack for the last clos ed month	Ray Delgado	Review it in the monthly meetin g. Write the cou ntermeasure if it is red.	A named owner and a monthly c heck.	