Comfort Pro Heating & Air

Software Book

November 29, 2026

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

The 80/20 Institute

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Software

Sample company. These aren't your numbers.

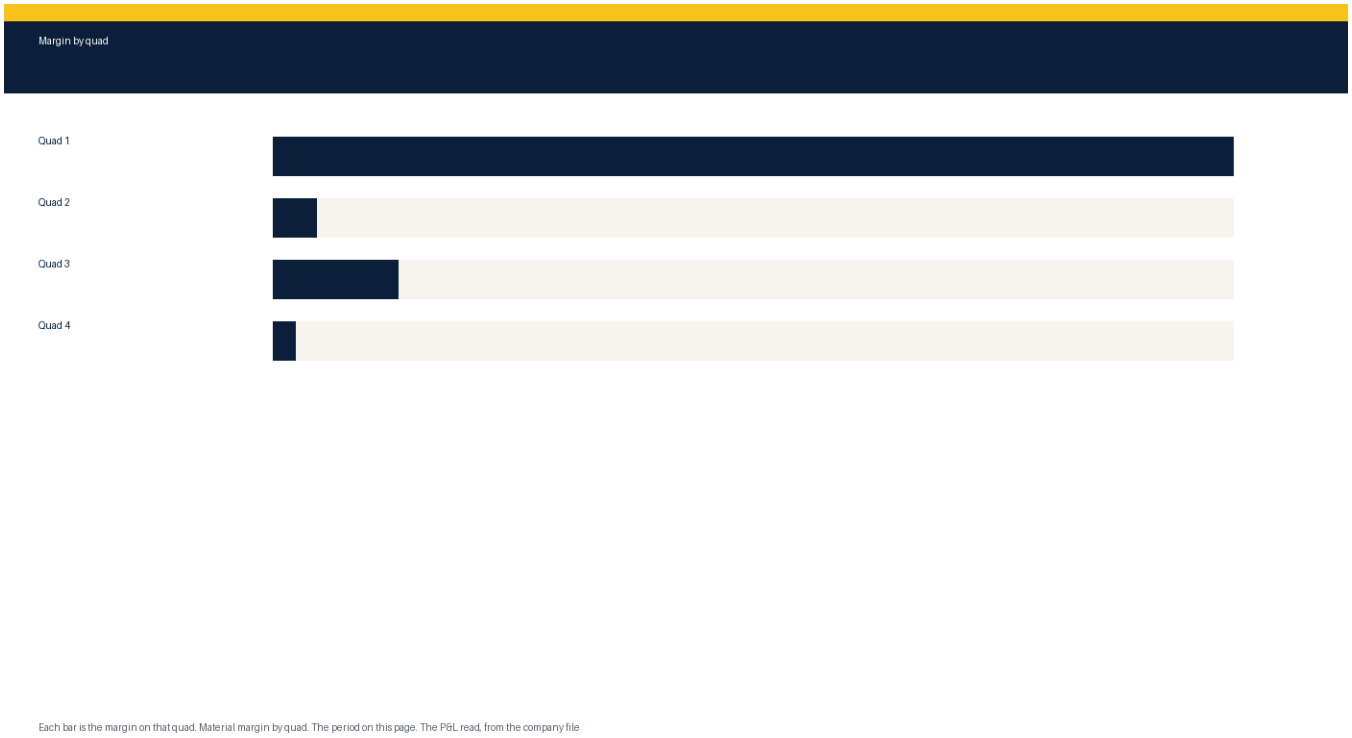
Comfort Pro Heating & Air. About $3M of sales in the latest full year, as of September 30, 2026, and about 25 people.

Right to Grow is 1.41.

Quad 1 is 76.2% of sales.

Quad 4 is 6.0% of sales ($180K).

Overhead is 22.2% of sales ($666K).



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	$2.3M	76.2%	$1.6M	67.9%	9	3
Quad 2	A customers buying B products	$230.3K	7.7%	$70.8K	30.7%	9	12

Quad	Meaning	Sales	Share	Margin	Margin %	Customers	Products
Quad 3	B customers buying A products	$304.1K	10.1%	$202.2K	66.5%	15	3
Quad 4	B customers buying B products	$180K	6.0%	$36K	20.0%	51	12

The Critical Few

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

The Critical Few

Item	Owner	Status	Target
Reprice maintenanc e plans at renewal	Sales	On track	Reprice maintenanc e plans at renewal
Bill every callback an d after-hours visit	Operations	Off track	Bill every callback an d after-hours visit
Set a minimum char ge on small one-off j obs	Operations	On track	Set a minimum char ge on small one-off j obs
Hold the price floor o n core accounts	Tasha Greene	On track	
Visit every core acco unt this quarter	Tasha Greene	On track	
On-time delivery bac k to the goal	Mike Sorensen	On track	
Exit the unprofitable tail	Mike Sorensen	Off track	
Gross margin holds at the year plan	Linda Park	On track	
Receivables inside t erms	Linda Park	On track	
A backup named for each lead seat	Linda Park	On track	
Open seats in the lar gest crew	Linda Park	Off track	
One new offer for co re accounts	Ray Delgado	On track	
Second quote on the top two vendors	Mike Sorensen	On track	

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

Scorecard

Measures

Measure	Owner	Goal	Current	Owner read
Revenue	Linda Park	$750,000	$781,267	
Gross margin	Linda Park	62.0%	62.0%	
Overhead	Linda Park	under $166,500	$173,441	
Overhead share of sales	Linda Park	under 22.2%	22.2%	
Right to Grow	Linda Park	2	1.41	
Quad 4 share of sales	Linda Park	under 10.0%	6.0%	
On-time delivery	Mike Sorensen	95.0%	96.0%	
Callbacks or rework	Mike Sorensen	under 4.5%	6.4%	
Quote cycle days	Tasha Greene	under 3.2 days	3.4 days	
Core accounts covered	Tasha Greene	90.0%	85.9%	
Discount beyond the floor	Tasha Greene	under 6.0%	5.2%	
Receivables past terms	Linda Park	under 11.0%	9.5%	
Inventory or parts turns	Mike Sorensen	6.4	6.91	
Overtime share	Linda Park	under 8.0%	6.9%	
Open seats	Linda Park	under 6	8.52	
Reviews finished	Linda Park	91.0%	86.9%	
Voluntary turnover	Linda Park	under 12.0%	12.7%	

Measure	Owner	Goal	Current	Owner read
Safety near misses logged	Mike Sorensen	8	8.64	
Recordable incidents	Mike Sorensen	under 2	1.72	
First-pass yield or first-time fix	Mike Sorensen	92.0%	93.0%	
Vendor bids opened	Mike Sorensen	4	4.32	
Single-source items	Ray Delgado	under 11	15.62	
Dead catalog items	Ray Delgado	under 8	8.48	
New offer pipeline	Ray Delgado	3	2.85	
Price book compliance	Tasha Greene	86.0%	87.0%	
Unprofitable customers	Mike Sorensen	under 9	7.74	
Unprofitable items	Ray Delgado	under 6	5.16	
Month close day	Linda Park	5.0 days to 8.0 days	6.5 days	
Cash collected this week	Linda Park	$57,692	$117,441	
Win rate on core quotes	Tasha Greene	36.0%	34.2%	
Training hours	Linda Park	120 hours	114 hours	
Backlog weeks	Mike Sorensen	4 to 8	6	
Scrap or warranty	Mike Sorensen	under $4,500	$3,870	
Freight given away	Linda Park	under $3,000	$2,580	

Measure	Owner	Goal	Current	Owner read
Decisions written	Ray Delgado	4	4.32	
Emergency response hours	Mike Sorensen	under 6 hours	9 hours	
Contract renewal rate	Tasha Greene	87.0%	83.1%	
Technician utilization	Mike Sorensen	68.0% to 84.0%	85.0%	
First-visit fix	Mike Sorensen	81.0%	82.0%	
Gross profit	Linda Park	$465,000	$484,386	
Contribution after overhead	Linda Park	$298,500	$310,944	