Hearthside Coaching

CEO view

November 29, 2026

This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026. Profit Bridge, from the company file.

The 80/20 Institute

Contents

1. How to read this page 3
2. The profit picture 4
3. The Critical Few 6

How to read this page

Sample company. These aren't your numbers.

Value. Baseline $240K. Goal $290K. Sized plan $769.9K. Projected EBITDA $1M. Recorded $587.4K. Recorded is what has already posted, and it is not this year's goal. Ahead $719.9K. A blank actual stays blank. 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.

The profit picture

Sized plan $769.9K. Counted once from sourced lines. The line total matches.

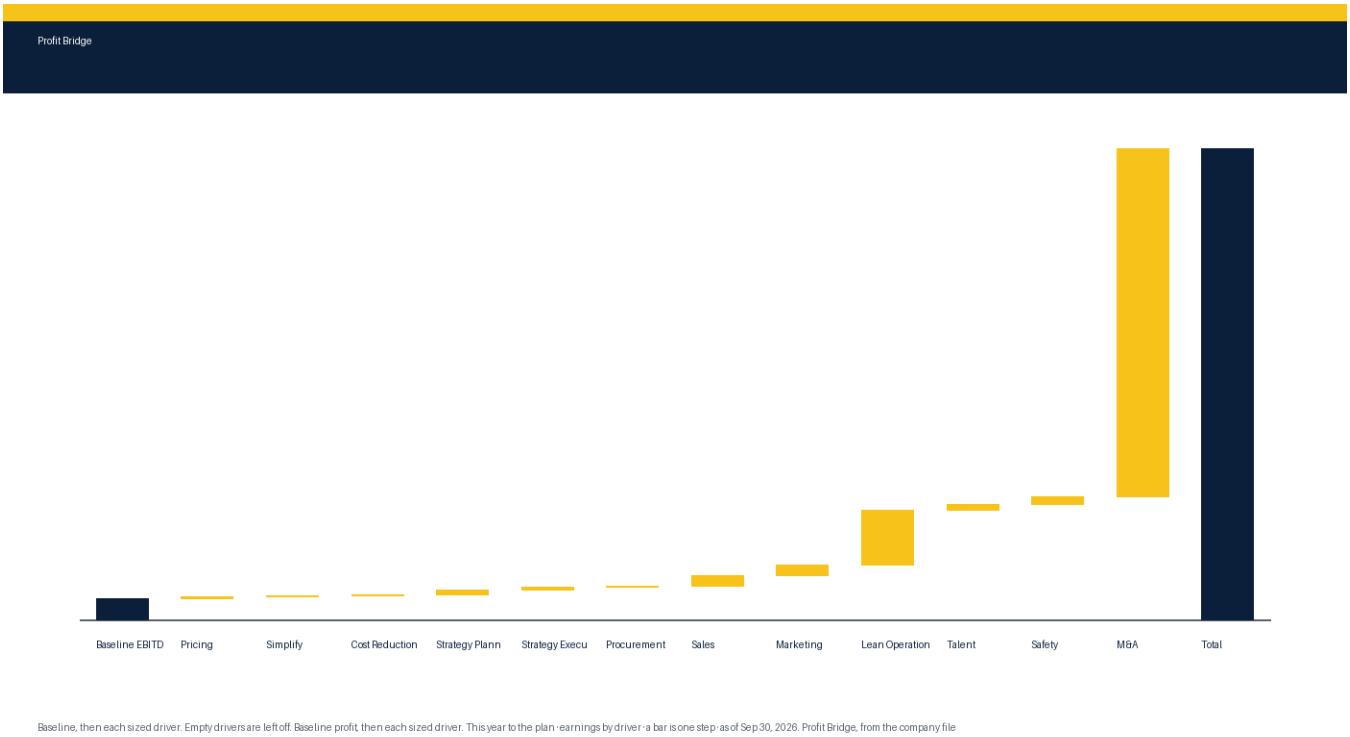
Baseline EBITDA $240K.

Sized plan $769.9K.

Recorded actual $587.4K.

This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026

Profit Bridge, from the company file



Baseline, then each sized driver. Empty drivers are left off. Baseline profit, then each sized driver. This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026. Profit Bridge, from the company file

Baseline, then each sized driver. Empty drivers are left off. Baseline profit, then each sized driver. This year to the plan · earnings by driver · a bar is one step · as of Sep 30, 2026. Profit Bridge, from the company file

Profit Bridge

Source	Plan	Actual	Status
Pricing	$15.3K	Not recorded	at_risk
Simplify	$16K	Not recorded	at_risk
Cost Reduction	$6,484	Not recorded	at_risk

Source	Plan	Actual	Status
Strategy Planning	$52.8K	$43.2K	On track
Strategy Execution	$37K	$24.8K	On track
Procurement	$3,169	$3,169	On track
Sales	$117.8K	Not recorded	at_risk
Marketing	$117.2K	Not recorded	at_risk
Lean Operations	$600K	$460.5K	On track
Talent	$63.2K	$53.8K	On track
Safety	$80.9K	$70K	On track
M&A	$3.8M	$3.8M	On track

The Critical Few

Initiatives

Initiative	Owner	Status	Plan	Actual
Move discounted packages to the standard retainer	Sales	On track	Not yet sized	Not recorded
Reprice or drop one-off workshops and speaking	Product	Off track	Not yet sized	Not recorded
Fill freed coach time with retained clients	Sales	On track	Not yet sized	Not recorded
Hold the price floor on core accounts	Jonah Hale	On track	Not yet sized	Not recorded
Visit every core account this quarter	Jonah Hale	On track	Not yet sized	Not recorded
On-time delivery back to the goal	Ruth Adler	On track	Not yet sized	Not recorded
Exit the unprofitable tail	Ruth Adler	Off track	Not yet sized	Not recorded
Gross margin holds at the year plan	Simone Grant	On track	Not yet sized	Not recorded
Receivables inside terms	Simone Grant	On track	Not yet sized	Not recorded
A backup named for each lead seat	Simone Grant	On track	Not yet sized	Not recorded
Open seats in the largest crew	Simone Grant	Off track	Not yet sized	Not recorded

Initiative	Owner	Status	Plan	Actual
One new offer f or core account s	Nora Pell	On track	Not yet sized	Not recorded
Second quote o n the top two ve ndors	Ruth Adler	On track	Not yet sized	Not recorded
Forecast only d eals with a date and a way out	Jonah Hale	On track	Not yet sized	Not recorded
Name the wallet the largest acco unt buys elsewh ere	Jonah Hale	Not started	Not yet sized	Not recorded
Name the step t hat sets the pro mise date	Ruth Adler	Off track	Not yet sized	Not recorded
Hold a weekly l ook at scrap or callbacks	Ruth Adler	On track	Not yet sized	Not recorded
Close the mont h by the eighth working day	Simone Grant	On track	Not yet sized	Not recorded
Cash and the c ovenant on the f irst page	Simone Grant	On track	Not yet sized	Not recorded
Finish the quart erly reviews that are still blank	Simone Grant	Not started	Not yet sized	Not recorded
Decide the seat that has stoppe d growing	Simone Grant	Off track	Not yet sized	Not recorded
Write the stop r ule before the n ext offer is fund ed	Nora Pell	Not started	Not yet sized	Not recorded

Initiative	Owner	Status	Plan	Actual
Take dead items off the quote form	Nora Pell	On track	Not yet sized	Not recorded
One-page pack signed for the last month	Nora Pell	On track	Not yet sized	Not recorded
Red scorecard rows have an owner	Nora Pell	On track	Not yet sized	Not recorded
Second source named for the single-source part	Ruth Adler	Not started	Not yet sized	Not recorded
Walk away from the quote below the floor	Jonah Hale	Off track	Not yet sized	Not recorded