

From Skimming to Scaling

How To Build A Highly Profitable Pool
Service Company That Runs Without You



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Introduction

The Truth About Growing A Pool Company

In 2022, I jumped into the pool industry with zero experience.

Not “a little” experience. Not “some”. None.

I didn’t come from construction. I hadn’t worked for another pool company. I couldn’t have told you the difference between pH and alkalinity if my life depended on it.

I came in cold.

What I did have was a fantastic business partner (Renee), a history of building and selling companies in other industries, and a growing desire to build something real and local. After selling some online and accounting companies, we wanted to take on a business that was physical, repeatable, profitable, and rooted in the real world.

So we did what we’ve always done.

We ran the numbers. Created our filters. Researched every home service vertical you could name.

And over and over, the pool industry kept rising to the top.

- Recurring revenue
- Solid profit margins
- Highly fragmented industry
- No dominant national brand
- Room to professionalize, brand, and scale

From the outside, it looked like the perfect business to grow. But what we didn’t see, and what many outsiders still miss, is this:

The pool industry is one of the hardest home services businesses to scale well.

Casey Graham
Co-Founder of Yummy Pools



This Business Is a Beast (and That's Not a Bad Thing)

If you're reading this, you probably already know what I'm about to say. The pool business isn't like HVAC, pest control, or roofing. It's not just about service—it's chemistry and water, it's unpredictable weather patterns, it's heavy equipment and untrained techs trying to troubleshoot complex systems on the fly.

And it's emotional. Unlike a roof or a foundation, your customers don't just look at your work. They jump into it.

There's no national standard, no licensing in most states, no universally accepted playbook. Every pool is different. Every week brings a new surprise. And the whole system—routes, teams, tools—is often a patchwork of trial, error, and workarounds.

And yet, somehow, this industry works.

Because of people like you.

You get up early. You lift gallons of chlorine in brutal heat. You rebuild pumps in driveways and take real pride in the simple miracle of clean water and a happy client.

You keep the system running. And most of the time, you don't get the credit you deserve.

That's why I wrote this book.

Why This Book Exists

This isn't a book about how to clean pools. You already know how to do that.

This is a book about how to build something around it—a real business. One that grows with intention. One that doesn't just rely on your hustle but creates structure, stability, and long-term freedom. One that, if you want, can eventually run without you.

But before we get into hiring, scaling, or systems, we need to confront a truth that most owners don't talk about:

**You don't have a growth problem,
you have a clarity problem.**

After speaking with over a thousand pool company owners across the U.S.—and reviewing hundreds of financials, org charts, and backend systems—I've come to recognize the same patterns, regardless of company size.

Whether they're servicing 30 pools or managing 3,000, the pain almost always comes down to one of two things:

1. They never took the time to define what success actually looks like for them.
2. They're stuck in the wrong stage of business and don't know how to move forward.

So this book is not just about business growth. It's about clarity. Direction. And building something that actually fits your life.

Let's make sure you don't grow by accident. Let's build with purpose.

The Book Is Split Into Two Parts—And That Matters

Part One: The Owner's Intent

This is where most owners get it wrong. They think the problem is growth. But the real problem is they don't know what they want. They're building without a blueprint. Part One helps you define what success looks like for you. In this part, you'll write your Owner's Intent and align your business with your life so that you can stop chasing every idea and start building something you're proud of.

Part Two: The 5 Stages of Pool Business Success

This is the roadmap. It's the model we built after studying real companies, from solo operators to multi-million-dollar enterprises. It will show you where you are, what's holding you back, and what to do next.

Here's the breakdown of the 5 stages:

1. The Solopoolneur

You're doing it all: cleaning pools, taking calls, hauling chemicals, managing every detail.

2. The Small Team

You've hired a couple techs or an admin. You're still in the field, but juggling a lot more.

3. The Steady Operation

You're out of the field, focused on sales and growth, but systems are shaky and leadership is thin.

4. The Scaled Company

You're leading, not doing. You have a real team. The business runs—but it's still demanding.

5. The Systematized Enterprise

You've built a company that runs without you. You can grow, sell, license, or pass it down.

Each stage comes with its own problems, its own people issues, and its own critical decisions. The goal of this book is to help you make those decisions with confidence and clarity.

Don't Skip Part One!

You might be tempted to skip ahead to Part Two. That's where we get tactical—the “how-to” you can act on right away.

But here's the thing: if you jump in without first doing the work in Part One, you risk building a business that looks right on paper but feels wrong in practice.

Alignment matters. Without it, growth can actually pull you further away from the life and business you want. That's when burnout creeps in. When you find yourself running a big operation but feeling disconnected, overworked, or unsatisfied.

So we begin where it really counts: with your vision, your values, and your definition of success.

Only once that foundation is clear do we move into systems and stages.

Quick Note Before We Go Any Further

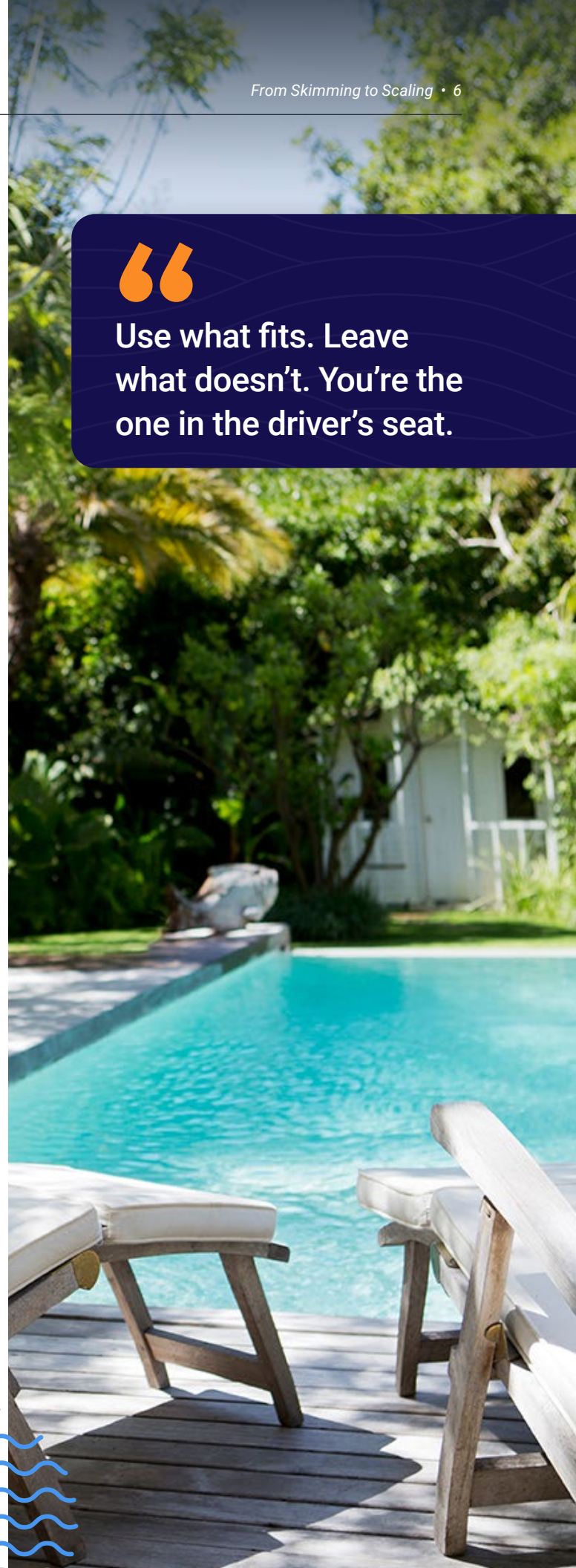
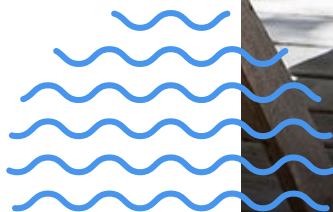
If you've been in this industry a while, you've probably had someone try to “fix” your business without ever stepping foot on a route. That's not what this book is about. These stages aren't rules—they're road signs. They're not gospel, they're guidelines.

Every business is different. Every owner has their own goals, constraints, and definition of success. What works for one company might not work for another, and that's okay.

Nothing in this book is meant to tell you what to do. It's meant to help you see more clearly what you want to do, and give you a framework to get there with less guesswork. Use what fits. Leave what doesn't. You're the one in the driver's seat.



Use what fits. Leave what doesn't. You're the one in the driver's seat.



PART ONE: THE OWNER'S INTENT

CHAPTER 1

What Is Success, Really?



Chapter 1

We're going to talk about how to grow your business, how to get out of the field, how to scale (if you want to) and how to do it with structure instead of stress. But before we get into any of that, I need to ask you something important.

What does success actually look like for you?

Not the version you'd post on Instagram. Not the image your competitor is chasing. Not what some business book told you to want.

I mean your version. Your life. Your definition.

Because until you define that clearly and honestly, nothing else in this book will matter. In fact, trying to grow without that clarity might actually make your problems worse.

Growth Without Direction Is a Trap

After speaking with thousands of pool company owners— from one-truck operators to eight-figure enterprises—I can tell you the most common issue isn't a lack of effort or ambition.

It's that many people don't actually love what they've built. They're tired. Frustrated. Overwhelmed. And when I ask why they started the business in the first place, the answer is almost always a shrug and something like:

I just wanted to be my own boss.

I figured I could make more money doing it myself.

I wanted more time with my family.

But the irony? Now they're working more hours than ever, making tighter margins, and family time is virtually nonexistent.

That's what happens when you chase an abstract idea of "success" without a clear definition of what it means for you.

You start stacking accounts. You hire a few techs. You get a second truck. You add a repair guy. Then suddenly you're managing a Frankenstein business that grew by default—not by design.

You never meant to build it this way. It just happened.

And here's the kicker:

Growth doesn't make you happy. It makes you more of what you already are.

- If you're unorganized, growth will scale your chaos.
- If you're overwhelmed, growth will accelerate your burnout.
- If you're unclear, growth will take you further from where you want to be.

That's why we start with your Owner's Intent. This is your personal definition of success. It's not a mission statement, or a slogan, or something you put on your website. It's your personal compass that guides you towards building the business that you want to build.

PART ONE: THE OWNER'S INTENT

CHAPTER 2

Before You Build, Define the Destination



Chapter 2

Imagine a new pool tech climbs into the truck for their first day, turns to their supervisor, and asks, “Where are we headed?”

And the supervisor shrugs: “I don’t know. Let’s just drive and figure it out.”

That’d be ridiculous. You’d never run a route that way.

And yet, that’s exactly how most business owners run their companies. They launch the business, take on work, pick up accounts, hire a buddy when things get too busy, and just keep driving—without ever stopping to set the destination.

Most of the time, they’re reacting. Saying yes to whoever calls. Hiring whoever seems decent. Putting out today’s fire without thinking about tomorrow’s direction.

They’re working themselves to exhaustion—not because they’re lazy or aimless, but because they never stopped to ask what they were actually building.

My Intent Entering the Pool Industry

When Renee and I started our pool business, we were crystal clear:

We wanted to build the largest pool cleaning company in Atlanta, then partner with private equity to take the concept nationwide.

That single sentence shaped every decision: where we spent money, who we hired, how we priced, what services we offered, and when we got out of the field.

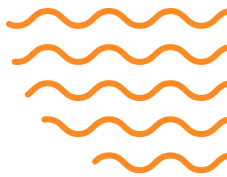
We didn’t stumble our way into scale—we aimed for it.

It’s also important to keep in mind that your Owner’s Intent can and should evolve. You can revise it, refine it, and make it more specific as you grow.

But you need a draft now. You need a **version of the future** you’re aiming at. Because the decisions you make today are either taking you toward that vision—or away from it.



It’s not about having a perfect plan. It’s about having direction.



PART ONE: THE OWNER'S INTENT

CHAPTER 3

Build a Business That Serves the Life You Want



Chapter 3

Most people don't start a pool company because they love managing payroll, leading meetings, or dealing with customer service complaints. They start because they're good at the work—cleaning, fixing, or building pools—and figure they might as well do it for themselves.

Why not earn more by cutting out the middleman?

It's a perfectly logical step. And for a while, it works.

You begin with 10 or 15 accounts. Word spreads. A few more customers come in. Before long, you're getting calls after hours, so you hire someone to help. Then comes a second truck. More work. More overhead. Now you're not just cleaning pools, you're managing people, training on the fly, and squeezing in admin at night.

You're working harder than ever. Maybe making a bit more money. But life feels tighter, not freer. The business isn't a pathway to freedom, it's something you're stuck inside.

Too often, business owners get so focused on growing the company that they forget to ask whether it's growing in a direction that actually serves them. Instead of designing the business to fit their life, they end up living by the demands of the business—reacting to problems, saying yes to everything, and losing track of why they started in the first place.



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Because ambition without alignment creates stress, not success.

One Vision Doesn't Fit All

Picture two owners:

- **Owner A wants to keep things simple:** run a tight team of two or three techs, make \$200K a year, be home by 3 PM, work four days a week, and stay lean. No interest in scaling.
- **Owner B wants to grow aggressively:** build out to 10+ trucks, hire leadership, install systems, and eventually exit to private equity or license the brand.

Now imagine both of them read the same business book about how to build a high-growth empire. If Owner A tries to follow that roadmap, he's going to end up overwhelmed—running a business that looks impressive from the outside but feels completely misaligned with the life he actually wanted.

Because ambition without alignment creates stress, not success.

This is where Owner's Intent becomes essential. When you're clear on your definition of success, you can build something that fits. Something that works for your goals, your family, and your lifestyle, not someone else's.

Growth Reveals the Gaps

Here's something no one tells you early on: growth doesn't solve your problems. It just puts them under a microscope.

If you're disorganized at 30 pools, you'll be even more disorganized at 300. If managing one tech overwhelms you, managing five will break you. If your pricing is messy now, scaling will just multiply your losses.

Growth amplifies whatever systems—or lack of systems—you've already built. It doesn't turn chaos into clarity. It turns a small fire into a wildfire.

So before we dive into strategy, marketing, hiring, or anything else in this book, you need to step back and ask yourself a few uncomfortable but necessary questions:

- Is the business I'm building aligned with the life I actually want?
- Is this structure serving me or am I constantly serving it?
- Is this company a vehicle for freedom or a trap I accidentally created?

The Power of Clarity

What I want for you isn't just growth, it's confidence. I want you to wake up knowing where your business is headed. I want you to recognize which opportunities fit your vision, and to feel empowered to say no to the ones that don't. I want you to build a company that not only runs well but actually feels good to run.

That starts with clarity.

Not a vague goal or a motivational poster, but a real, written statement about what you want this business to become, and how it should support the life you're trying to live.

That's your Owner's Intent. It's the next step in this journey, and we'll walk through exactly how to write it in the next chapter.

But understand this: if you skip that work, the rest of this book won't help you. You'll chase someone else's success. You'll grow in the wrong direction. You'll put the pedal down without realizing the car is pointed at a wall.

Let's make sure that doesn't happen.

Let's define your destination so you can build a business that's actually worth driving toward.

PART ONE: THE OWNER'S INTENT

CHAPTER 4

How to Write Your Owner's Intent (Step by Step)



Chapter 4

How to Define Your Owner's Intent

Your Owner's Intent isn't just a motivational exercise, it's your blueprint. It should ground your decisions, filter out distractions, and guide how you build the business from this point forward. Getting clarity doesn't need to be complicated, but it does require honesty. Here's how to get there.

Step 1: Define What You Want

Before anything else, get quiet and ask yourself the questions that actually matter:

- How big do I want this company to get?
- Do I see myself in the field long-term, or do I eventually want to step out?
- Am I aiming for a tight, profitable operation or do I want to build and lead a larger team?
- Is this a business I plan to sell, pass down, or keep for the long haul?
- What am I really after: freedom, flexibility, income, legacy—or a mix of all four?

Don't answer based on what sounds impressive. Be honest about what sounds right for you.

Maybe your vision looks like this:

"I want to run a lean, two-route business that pays me \$150K a year, gives me Fridays off, and gets me home by 3 PM."

Or:

"I want to grow to 10 trucks, hire a GM to run operations, and focus on expanding into other markets."

Or even:

"I want to build a company that creates great jobs in my community, serves 500 families, and lasts for the next 20 years."

There's no wrong version of success. But you can't build toward it until you name it.

Step 2: Get Clear on What You Don't Want

Sometimes it's easier to define your path by identifying the things you want to avoid. Think back to the moments in your work that drained you, frustrated you, or pulled you out of alignment.

Write those down, too:

- "I don't want to be on call every weekend."
- "I don't want to work 12-hour days forever."
- "I don't want to manage a big team if I don't have to."
- "I don't want to sell if it means sacrificing quality."

These aren't complaints, they're boundaries.

Knowing what you're not willing to build is just as important as knowing what you are. Together, your goals and your guardrails will shape a business that actually fits you.

Step 3: Anchor It to Your Life

Now zoom out. Ask yourself: What kind of life is this business supposed to support?

- What do I want my days to look like?
- How much time do I want to spend with my family?
- What do I want to be free to do?
- Where do I want to be, financially and personally, five or ten years from now?

Be specific. Be unapologetic. If you want to build something massive and exit in five years, say that. If you want to stay small, stress-free, and profitable, say that too. If your dream is summers in the mountains or more time with your kids, name it.

Your business should serve your life, not the other way around. And the only way to make that happen is to design it with your life in mind.

Step 4: Put It in Writing

It's not enough to think you know what you want. You have to write it down. Until it's written, it's just a foggy idea—easy to ignore, easy to forget.

Start with a simple framework:

"I want to build a pool company that _____, so that I can _____. I'm willing to _____ to make that happen. But I'm not willing to _____."

Or use prompts like:

- "I'm building this business so that..."
- "The business should allow me to..."
- "I want to grow to a point where..."
- "When I succeed, I want to feel..."

Write until it clicks. When you read it back and feel a sense of relief, like something just got unstuck, you'll know you've found it.

That's your Owner's Intent. It's your compass from this point forward.

This Is Your Compass

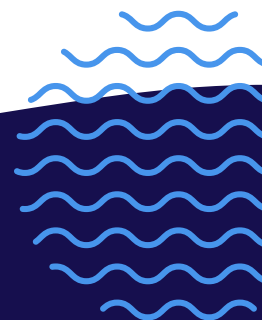
Once you've written your Owner's Intent, it becomes your north star.

Use it to:

- 👥 Decide which customers to take on (and which to say no to).
- 👉 Choose what roles to hire for next.
- 📈 Decide whether you should scale—or slow down.
- 💰 Build pricing that supports your vision (not just covers costs).

If you ever feel lost, burnt out, or unsure, go back to it. Because clarity doesn't come from the next podcast, or the next strategy, or the next marketing trick.

Clarity comes from knowing where you're going.



PART ONE: THE OWNER'S INTENT

CHAPTER 5

My Owner's Intent (So You Know Where I Stand)



Chapter 5

I'm not approaching this book as a consultant or theorist. I'm a business owner, like you.

Over the years, I've built companies that worked—and a few that didn't. I've experienced both the satisfaction of getting it right and the frustration of getting lost along the way. I've made money, made mistakes, and at times, questioned whether I was building something sustainable or just surviving the next wave of chaos.

Through all of it, the one practice that's consistently helped me move forward with more clarity and intention is this: defining exactly what I want the business to do for my life.

That's what Owner's Intent is about. And that's why it's the foundation of everything that follows.



My Owner's Intent (and Why You Need Yours)

In 2022, after building and selling a few online and accounting businesses, my business partner Renee and I decided it was time for something different. We weren't looking for another digital venture. We wanted something grounded—something real, recurring, and rooted in a local community.

So we made a list of what mattered most to us. The next business needed to offer steady, repeatable revenue. It had to be in a fragmented industry—one without a dominant player—where great service and strong branding could create a real edge. Most importantly, it had to be scalable. We didn't want to just trade our time for income; we wanted to build a system, a team, and long-term value.

After exploring a range of home service categories, the pool industry kept rising to the top. It checked all the boxes: recurring work, high customer expectations, and a serious opportunity to stand out through professionalism and operational discipline.

But what looked promising on paper quickly proved more complex in practice.

This isn't just another home service. It's chemistry. It's weather. It's logistics. It's labor. It's managing expensive equipment in unpredictable outdoor environments. It's deeply personal, too—because customers don't just see your work, they physically step into it.

We realized fast that this was going to take more than a smart spreadsheet and a good brand. We needed clarity. And we had it.

Our Intent, From Day One

From the start, Renee and I were aligned on where we were headed:

We wanted to build the largest pool cleaning company in Atlanta, then partner with private equity to take the concept nationwide.

That single sentence became our compass. It shaped every decision—who we hired, what we spent, where we focused, and which distractions we

avoided. We weren't trying to become the biggest builder. We weren't chasing awards. We weren't trying to win the popularity contest in the industry.

We were building something scalable, repeatable, and investable. Every opportunity, every challenge, every idea had to answer a simple question: Does this move us closer to that vision?

- Should we run this marketing campaign? Only if it attracts the kind of customer we can serve at scale.
- Should we acquire this company? Only if it strengthens our position in Atlanta.
- Should we offer this new service? Only if it can be delivered consistently, profitably, and across multiple locations.

That's the value of Owner's Intent. It takes the guesswork out of decision-making. It cuts through the noise. It keeps you from chasing ideas that don't belong in the business you actually want to build.

“

That single sentence became our compass.

But This Isn't About Copying Mine

I'm not sharing our intent because you should adopt it. In fact, if you're in a different season of life, it would probably be a mistake to follow what we're doing.

I'm sharing it because you need clarity too—your own version, not someone else's.

Your Owner's Intent might sound completely different:

"I want to build a boutique pool company with 2–3 techs, make a great living, and have total control over my schedule."

"I want to create a seven-figure business that provides meaningful jobs in my community and supports my family for decades."

"I want to keep things small and simple, work with great clients, and avoid unnecessary stress."

"I want to grow aggressively, sell in the next three years, and use that capital to launch my next venture."

Whatever your goal is, name it. Write it. Own it. Because the more specific and honest you are, the easier it becomes to make the right decisions and avoid the ones that would pull you off track.

Keep Coming Back to It

Your Owner's Intent isn't a one-time exercise. It's a tool you'll use again and again. I revisit mine at least quarterly.

- Whenever I'm making a hiring decision...
- Considering a new investment...
- Feeling tempted to chase something shiny...
- Or just feeling off and disconnected from the work...

I go back to the page. I remind myself what we're building and why.

It keeps me centered. Focused. Clear.

And it will do the same for you if you're willing to put in the time to define what really matters.

Let's make sure the business you're building is one you actually want to own. That starts with knowing exactly what it's for.

“

Let's make sure the business you're building is one you actually want to own. That starts with knowing exactly what it's for.



PART ONE: THE OWNER'S INTENT

CHAPTER 6

Write Your Owner's Intent



Chapter 6

If you've made it this far, it's clear you're not just trying to grow a business—you're trying to build one that works for your life.

That brings us to the most important step in this first section. Not because it's complicated, or time-consuming, but because it requires you to pause and be honest with yourself.

It's time to write your Owner's Intent.

Not just think about it. Not jot down a few vague goals. But actually write down a clear, personal definition of what you want this business to become and how it should serve your life.

Once you do, you'll have something more valuable than a mission statement or a revenue goal. You'll have a decision-making filter. A way to say yes with confidence and no without guilt. You'll have clarity.

So let's walk through how to do that.





Owner's Intent Worksheet

Use this to put words to what you're really building.

Step 1: Define What You Want

Get specific. Let go of what sounds impressive and focus on what feels right to you.

How big do I want this business to get?

Do I want to stay in the field—or eventually step out?

Do I want a lean, profitable operation or a larger team with growth potential?

Is this something I want to keep forever, sell, or pass on?

What do I value most: time, freedom, money, impact, or legacy?

Step 2: Get Clear on What You Don't Want

Define your boundaries and what you AREN'T looking for. This can include statements like:

- I don't want to be on call every weekend.
- I don't want to work 12-hour days forever.
- I don't want to manage a big team.
- I don't want to grow just for the sake of growth.

What do you not want for your life as it related to this business?

Step 3: Connect It to Your Life

Zoom out. Ask yourself:

What kind of life do I want this business to support?

What should my day-to-day actually look like?

How much time do I want with my family—or to myself?

What do I want the business to eventually make possible?

Step 4: Write Your Statement

Now bring it all together in a short, clear statement. Use this structure if it helps:

I want to build a pool company that _____ so that I can _____.

I'm willing to _____ to make that happen, but I'm not willing to _____.

Or use one of these prompts to get started:

- I'm building this business so that...
- I want to grow to the point where...
- The business should allow me to...
- I never want to be stuck doing...
- When I succeed, I want to feel...

Write until it feels right. You'll know you've landed on it when it feels like a deep exhale—like something you've been trying to name finally clicked into place.

Make It Useful

Once you've written it, keep it close. This is a working tool, not a forgotten file.

- Print it out. Post it in your office.
- Save it to your phone or computer.
- Review it monthly, or whenever you feel overwhelmed or off-track.
- Talk about it with your spouse, partner, or team.
- Use it to guide every big decision: hiring, pricing, service offerings, marketing, expansion.

When you're tempted to add something shiny or feel pulled in too many directions, your Owner's Intent brings you back to center.

Don't Wait for Perfect

Your Owner's Intent isn't permanent. It's not a contract—it's a compass. It should evolve as you grow, learn, and change. What matters is that you have a version of it today, so you can start building with direction.

If you're waiting to "get through the busy season" or find the perfect words, you'll never write it. Don't aim for polished—aim for honest.

PART TWO

The 5 Stages of Pool Business Success



The 5 Stages of Pool Business Success

Before we dive into growth strategies, we need to get clear on where you are right now.

Because if you don't know what stage you're in, you'll either:

- Try to solve the wrong problem, or
- Chase someone else's version of success

That's why so many pool business owners end up overwhelmed— they're trying to implement the wrong systems for their stage, or worse, copying companies that are years ahead of them.

What follows is a framework we've developed over the past few years: **The 5 Stages of Pool Business Success.**

This model was built from the ground up, through:

- Deep-dive operational reviews of hundreds of pool companies
- Interviews and conversations with over 1,000 pool business owners
- Ongoing data partnership with Skimmer, the largest pool software company in the U.S.
- Financial reviews of pool companies across the country as part of my role, post-acquisition

I've seen the numbers up close, analyzed the trends, and worked directly with companies as they grow, evolve, and sometimes stall.

This framework isn't a generic business lifecycle. It's rooted in the real experience of pool pros just like you and designed to give you a clear path forward, no matter your current stage.



PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS


CHAPTER 7

The 5 Stages of Pool Business Success



Chapter 7

This model applies to service-driven companies—those focused on cleaning, maintenance, and repair.

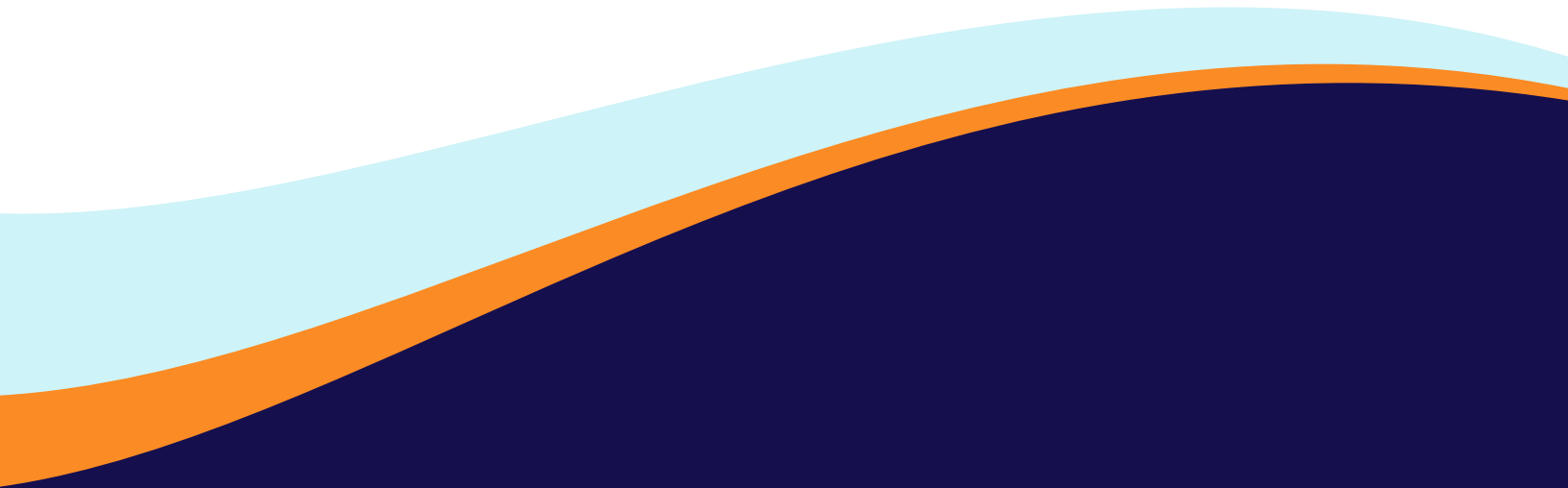
**One important caveat:** If your business includes major construction, renovations, or new builds, this chart changes drastically. Builders operate on a different timeline, risk profile, and cash cycle. This model is tailored for the service side of the industry.

Here’s the breakdown:

Stage	Revenue	Team Size	Common Blocker	% of Businesses
Solopoolneur	\$0-\$150K	1	Time	76%
Small Team	\$150K-\$350K	2-4	Sales	9%
Steady Operation	\$350K-\$1M	5-10	Marketing + Service	8%
Scaled Company	\$1M-\$3M	11-20	Hiring	6%
Systematized Enterprise	\$3M-\$10M	21-50	Strategy	1%

Most companies get stuck because they’re trying to solve challenges that belong to a different stage. A \$1.5M company might still operate like a one-man shop, while a \$500K company with great systems might outperform businesses twice its size.

This framework helps you align where you are with what actually works.



PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS

CHAPTER 8

The Solopoolneur



CHAPTER 8

The Solopoolneur

If you're reading this and thinking, "Yup, that's me" you're not alone. In fact, 76% of all pool companies in the U.S. fall into this stage.

You wake up early, load your truck, clean every pool, handle every customer call, fix what you can, invoice at night, and maybe post on social media when you remember.

You are the business.

Some days, that feels empowering. Other days, it feels like a trap.

First, Respect Where You Are

Let's be clear: this stage takes guts. You're not "just a guy in a truck", you're running an entire company by yourself. You've chosen this path because you wanted freedom, control, and the satisfaction of working on your own terms. And in many ways, you've achieved that.

But the question is: **Do you want to stay here?**

Two Mindsets at This Stage

The Happy Craftsman

You've built a solid, dependable business with 30–40 loyal customers. You take pride in your work and deliver service the big companies can't match. You value quality, relationships, and autonomy. If that's your definition of success, great. Stay there and optimize it.

But if you're starting to feel worn down, limited, or unsure how to grow without burning out, it might be time for a shift.

The Frustrated Hustler

You've tried to expand—hired someone, added routes, raised prices—and hit setbacks. You're tired of doing it all but unsure what to change. You're not failing. You're just overwhelmed. Most owners in this stage don't lack drive. They lack a roadmap.

The Real Issue: You're the Bottleneck

Everything runs through you:

- Service
- Sales
- Customer communication
- Scheduling
- Billing

If you're out sick, things stop. If your truck breaks down, work stalls. That's not a business—that's a job with a truck and a tax ID.

Growth means building a system that works even when you take a day off.

The Hidden Risk: Resentment

There's a quiet frustration that can creep in here. You might catch yourself resenting larger companies or dismissing growth altogether. But sometimes, that resentment masks something deeper—a desire for change, mixed with fear about what it takes.

You don't have to grow. But if you want more time, freedom, or income, something has to give.

The Shift: Buy Back Your Time

If you're ready to grow, the path starts by reclaiming your time. That doesn't happen overnight, and it doesn't happen at all unless you make some key moves.

Step 1: Raise Your Prices

Most Solopoolneurs charge too little. But price must be based on value and cost, not comfort. A 15–20% increase might feel risky, but it's often what creates the margin to hire help or reduce hours.

Step 2: Hire Admin Help First

Before adding another tech, bring on someone to handle admin, either part-time or full-time. They can manage:

- Scheduling
- Invoicing
- Customer communication
- Ordering supplies

This clears space for you to focus on growth instead of details.

Step 3: Systematize with Skimmer

If you're still running your business from memory or Post-it Notes, you're limiting your growth. Set up Skimmer to manage:

- Routes
- Service logs
- Invoicing
- Customer reminders

Let the system do the remembering so you can do the leading.

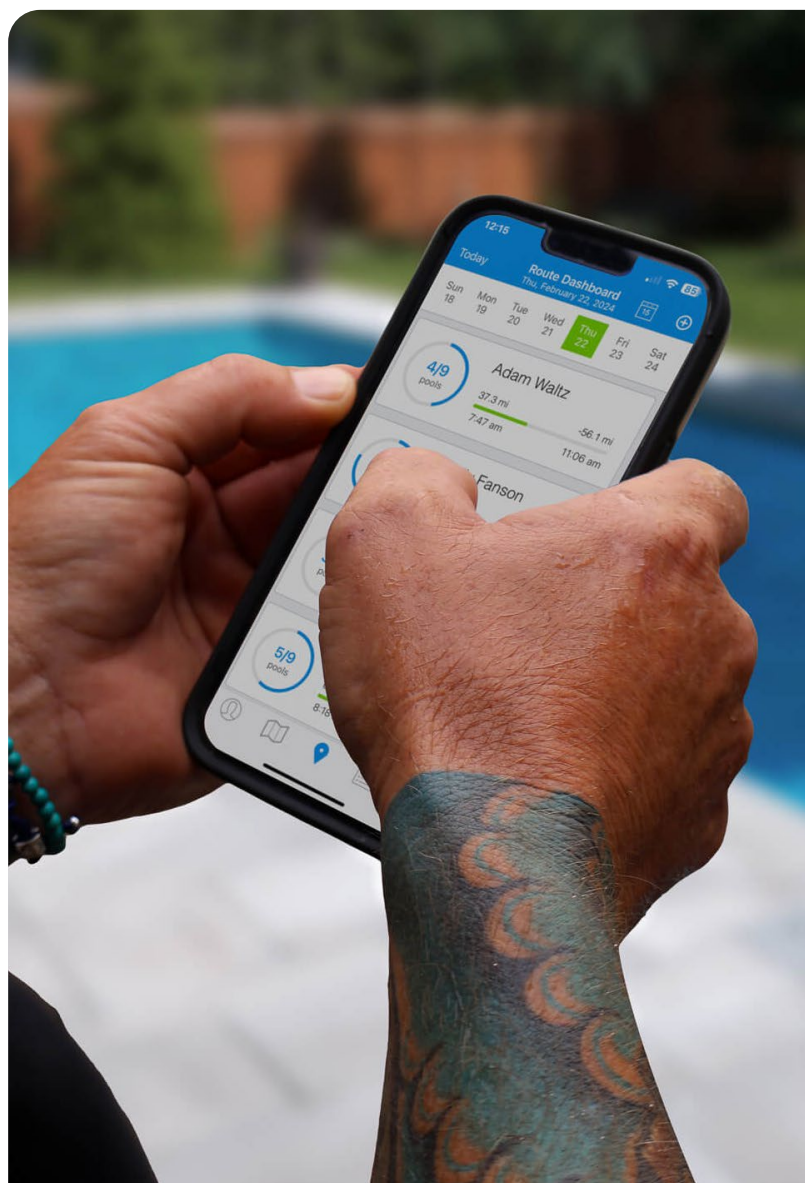
Signs You're Ready to Grow

You might be ready for the next stage if:

- You're working more than 50 hours a week
- You haven't taken a real vacation in a year
- You're nearing burnout
- Revenue has plateaued
- You feel stuck, even though you're working hard

Growth doesn't mean hiring a massive team tomorrow. It means starting the shift toward a business that can run without depending on you for everything.

If that sounds like the future you want, then let's move to Stage 2.



PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS

CHAPTER 9

The Small Team



CHAPTER 9

The Small Team

You've hired someone. Maybe two. You're out of the truck a few days a week. For the first time, you're not the only one holding it all together.

That's a big step.

But here's the part no one tells you: growth doesn't just bring relief. It brings new responsibilities and a whole new kind of stress.

Letting go sounds great. But in practice? It's hard.

You're not just offloading tasks. You're giving up control. You're trusting others to deliver the standard you've spent years building. And when they fall short, it hits hard.

You've Got Help... But You're Still in the Middle

At this stage, your company might look like this:

- A couple of loyal techs
- A spouse or friend helping with admin
- Basic software tools in place
- And you—still doing the hard jobs, fielding customer calls, and cleaning up mistakes

You're not solo anymore. But you're also not free.

You're wearing every hat: owner, sales lead, service tech, admin, manager. You're making money, but it doesn't feel like it.

Our Story: Relief Meets Reality

When we reached this stage it was both exciting and unnerving. We'd just acquired a small route (13 accounts) and with it came a seasoned tech. That tech trained us. One of us literally rode along in the truck, learning from someone who'd been doing it for years.

Eventually, we stepped back from the field, and for a brief moment, we breathed. But that moment quickly filled with doubt:

- Will they show up today?
- Will they do it right?
- What if we lose that customer?



Every next level brings new devils.

A mentor gave us a piece of advice that stuck:

This stage isn't about arrival. It's about learning to lead while things are still messy.

Why Most Pool Companies Get Stuck Here

Roughly 85% of pool businesses never grow beyond this stage. And it's not due to lack of ambition. It's about control.

At this level, most owners:

- Still give customers their personal number
- Micromanage instead of delegate
- Jump back in the field at the first sign of trouble
- Build habits, not systems

They end up overworked, stressed, and unaware that they've become the ceiling of their own company.

The Real Role of a Small Team Owner

To move forward, you need to make a shift: from doing everything to focusing on what drives growth.

That means pulling three big levers:

Lever 1: Make Recruiting a Habit

People will leave. No matter how great your culture is, turnover happens. The key is to stay ahead of it.

- Post job ads regularly, not just when you're desperate
- Interview consistently
- Keep a bench of potential hires

Think of recruiting like sales. It's a pipeline. And if it dries up, so does your momentum.

Lever 2: Turn Sales Into a System

Sales isn't just about finding new customers. It's about unlocking more value from the ones you already have.

Start by:

- Walking equipment pads regularly
- Recommending upgrades before problems arise
- Teaching techs to spot and suggest improvements
- Offering referral bonuses and tracking results

You're not selling aggressively—you're helping proactively. That shift builds trust and revenue.

Lever 3: Build a Real Training Program

Most techs fail because they're thrown in without guidance.

Training isn't a luxury. It's how you scale.

Start with:

- Shadowing days
- Clear SOPs and checklists
- Weekly coaching sessions
- A defined path for growth

Well-trained techs make fewer mistakes, stay longer, and give you room to lead.

Let's Get Practical

This stage is where many owners stall. Here's how to move forward.

1. Make Recruiting Part of Your Week

- Post job ads every month
- Interview 2 candidates weekly (even if you're not hiring)
- Keep a shortlist of solid "maybe" hires

2. Build a Monthly Upsell Routine

- Walk pads and snap photos
- Script simple upgrade offers
- Train your team to pitch value—not just complete tasks

3. Install a Repeatable Training System

- Start small: shadowing, checklists, review sessions
- Use videos or documentation to reinforce
- Measure performance and coach regularly

This is where your team becomes a business. And that business? It's the bridge to your next chapter.

PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS

CHAPTER 10

The Steady Operation



CHAPTER 10

The Steady Operation

You've made it past survival mode.

You've built a team, handed off the day-to-day, and you're finally seeing the benefits of real systems. Welcome to the Steady Operation stage—where the business can run without you being in every detail.

Take a minute. That's a huge accomplishment.

But with new capability comes a new challenge: sustaining and strengthening what you've built.

Why This Stage Is So Rare

Fewer than 1 in 4 pool companies ever make it here. Most either stay small by choice or stall out trying to grow without systems.

But if you've reached this point, it means you've done something most never do. You've turned a hustle into an operation. And that's worth celebrating.

What Makes This Stage Great

Here's what changes:

- You can step away without the business falling apart
- Your team feels like a tight-knit group
- Customers are happy, and complaints are fewer
- There's momentum—and room to breathe

You're still involved, but not essential to every fire. And maybe for the first time, you're starting to enjoy the business.

But There's a Catch

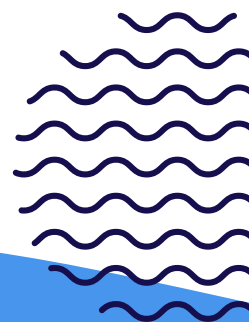
The habits that got you here won't take you further. You need:

- Defined roles and responsibilities
- Clear SOPs, not just “we've always done it this way”
- Meeting rhythms, reporting, and alignment
- A leadership mindset—not just a manager's

Without this structure, the machine starts to shake:

- Routes slip through the cracks
- Communication breaks down
- Staff get frustrated and quit
- Customers notice the inconsistency

You're not fixing pools anymore. You're building people. That's the new job.



What to Focus On

To grow past this stage—or even just to stabilize it—you need to focus on three key areas:

1. Promote a Field Leader

You can't be everyone's point person. Hire or promote someone to:

- Train new techs
- Handle issues in the field
- Liaise with the office
- Maintain service standards

This gives you leverage and keeps the business running cleanly.

2. Treat Marketing Like a Department

At this level, referrals and word-of-mouth aren't enough.

You need:

- Local SEO and online reputation management
- Paid ads (Google, Meta)
- A structured referral program
- Tools that measure ROI

Marketing isn't a maybe, it's the engine that drives steady growth.

3. Create a Culture of Communication

You're not a crew anymore. You're a company. And companies need rhythm.

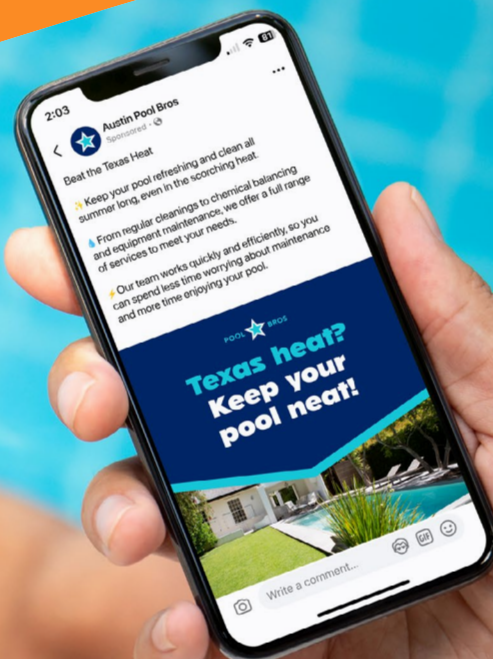
- Weekly team meetings
- A visible org chart
- Shared goals and priorities
- Real feedback loops

Culture is no longer what happens by accident—it's what you lead intentionally.

In this stage, you stop doing everything yourself and start building the team that does it well without you.

It's challenging. But it's also one of the most rewarding transitions in your journey.

Ready for Stage 4? Let's keep going.



PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS

CHAPTER 11

The Scaled Company



CHAPTER 11

The Scaled Company

Reaching Stage 4 isn't common. Staying here—and thriving—is even more rare.

If you've made it to the Scaled Company stage, you've earned your spot. You've survived the early grind, built a real team, put systems in place, and created something that doesn't fall apart when you step away for a week.

That alone makes you a standout.

At this level, the work shifts. You're not in reaction mode anymore. You've seen most of the common problems and you've built the muscle to handle them. Now, the focus is refinement.

From Chaos to Capability

In the earlier stages, everything ran through you. Every decision, every issue, every fix.

Now? You have people. Systems. A team that gets things done even when you're not watching every move.

It's not perfect. But it works. And more importantly, it works without you in the center of it all.

This is what real leverage feels like.

Why This Is a Sweet Spot

There's a reason many owners choose to stay here:

- The chaos has calmed down
- You've got financial stability
- Your days are more predictable
- You can take vacations without guilt
- You can focus on big-picture goals instead of daily tasks

It's one of the most satisfying places to operate from. When we hit this stage, the business finally felt... fun. We had enough revenue and team strength to relax into the role of true leadership. No more scrambling. No more fires every five minutes.

We weren't just running the business. We were shaping its future.

Real Profit, Real Freedom

This is the first stage where true profitability kicks in.

Say your company brings in \$1.5M per year. If 60% of that comes from recurring cleaning, 40% from repair, and you're running at a 15% net margin? You're clearing around \$250K a year.

And you're not earning it with your hands anymore—you're earning it through your systems.

You've built something that pays you back.

But There's a Ceiling

This is a great place to be. But if you ever want to sell the business, expand into new markets, or build something that outlasts you, there's a catch:

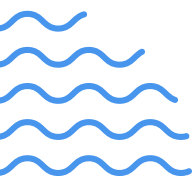
Your company may still revolve around you.

Even at \$2M+ in revenue, most pool companies are still owner-dependent. You may have solid people, but you probably don't have true leadership in place yet.

And that limits your options.

If you disappear for too long, things start to slip—quality, culture, accountability. And if you ever want to sell? That dependence knocks down your valuation.

So the next evolution isn't about growing revenue, it's about growing leaders.



What Got You Here Won't Get You There

Up to now, you've hired good people—team players who care. But to reach the next level, you need specialists. People who've done this before.

You need leaders.

- **A Financial Controller** who owns the books, the reports, the billing, and the forecasting.
- **An HR Lead** who standardizes hiring, onboarding, culture, and compliance.
- **An Operations Director** who can run the field, optimize logistics, and hold the team accountable.

This is where your job changes again.

You become the **Chief Recruiter of Leaders**—the one who brings in the next generation of thinkers, operators, and builders.

Your job isn't to do. It's to build the team who can do better than you.

The Cost: Short-Term Sacrifice, Long-Term Scale

Hiring this kind of talent isn't cheap. And in the short term, it may mean taking home less money.

But it's the only path to real scale.

If you want a business that can:

- Run without you
- Grow without chaos
- Sell at a premium
- Expand to other cities

...you'll need a leadership team in place. Not just helpers. Not just hard workers. Actual leaders.

That shift is what separates good companies from great ones.



Let's Get Practical

Here's how to take the leap from a solid, stable business to something built to last.

1. Identify What You Still Own

Take inventory. What's still tied to you?

- What tasks can't happen unless you're involved?
- What would fall apart if you took a month off?

Now highlight the strategic roles—finance, operations, HR—and flag the ones that need real leadership. That's your next org chart.

2. Start Hiring Like a Grown-Up Company

This is where you move beyond gut instinct. You write real job descriptions. You build a hiring process. You search for people who have led teams, built systems, and delivered results.

You may need:

- Recruiters
- Referrals
- Higher salaries

That's the cost of real talent. But it's also the bridge to a business that runs without you.

3. Revisit Your Owner's Intent

Now that you've arrived here, pause.

Do you want to stay in this sweet spot—earning well, working less, and keeping things tight?

Or do you want to build an asset that could one day sell for seven figures, operate across cities, or outlast your own involvement?

Neither path is wrong. But it's time to decide.

Because what you choose here sets the course for everything that comes next.

Final Thought

Reaching Stage 4 means you've led well. You've worked hard. You've built something real.

You can stay here. Or you can take the leap to Stage 5.

But if you do choose to grow, know this: your future isn't built by doing more. It's built by building better people, better systems, and better leadership around you.

Let's get into what that looks like in the final stage: the Systematized Enterprise.



PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS

CHAPTER 12

The Systematized Enterprise



CHAPTER 12

The Systematized Enterprise

If you've made it to this stage, you've done what 99% of pool company owners never do. You've built a real business. Not just a service. Not just a job. A machine that runs with or without you.

And now, you're standing at a unique crossroads.

You can keep operating, keep optimizing, and keep enjoying the life you've built. Or you can build something bigger. Something that scales beyond your city. Something you could one day sell for millions or pass down as a legacy.

But to do that, you need more than just great service and solid systems. You need leadership. Vision. Precision. And above all—distance.

Because at this level, **you are no longer the operator**. You're the architect.

The Goal: A Business That Works Without You

At Stage 5, the mission is clear:

Build a company that runs well without your daily involvement.

This doesn't mean disappearing completely. It means elevating your role to focus only on the highest-leverage moves:

- Long-term strategy
- Mergers and acquisitions
- Market expansion
- Executive development
- Protecting vision and values

If the business can thrive while you take a six-week sabbatical, you're doing it right.

What Makes This Stage Different

At this level, everything changes again. The way you think, hire, lead, and measure success all shift.

You're no longer thinking about how to fill the schedule.

You're thinking about:

- How to enter new markets
- How to build durable culture at scale
- How to create systems that protect quality as you grow
- How to increase enterprise value for a potential exit

This is where business ownership becomes business stewardship.

Real Leadership Teams

The foundation of a systematized company is your leadership team. Not just managers. Not just helpers. **Leaders who lead leaders.**

You'll need to fully empower:

- **A Controller or CFO** who owns every dollar—forecasting, budgeting, reporting.
- **A strong Ops Director or COO** who runs day-to-day across field and admin.
- **An HR Lead or People Ops Head** who builds scalable hiring, training, and culture systems.
- **A Marketing Director** who turns growth into a predictable machine.

These are no longer nice-to-haves.

They are required for scale.

Metrics That Matter

In earlier stages, you watched revenue. Then profit. Then customer retention.

At this stage, the focus shifts to:

- EBITDA (earnings before interest, taxes, depreciation, amortization)
- CAC and LTV (customer acquisition cost vs. lifetime value)
- Team productivity per tech or route
- Revenue per department, location, or division
- Bench strength (your readiness to promote from within)

Because now, you're not just building for today. You're building for valuation.

The Exit Conversation

Whether or not you plan to sell, **you should build like you will.** Why?

Because businesses built for acquisition are also the ones built to last:

- Clean books
- Solid margins
- Defined leadership roles
- Process-driven delivery
- Culture that can scale
- Clear brand differentiation

You may never sell. But if you build as if you will, you create optionality—and leverage.

When the day comes that someone knocks with a serious offer, you'll be ready.

And if that day never comes? You'll still own an exceptional company that runs beautifully.

The Tradeoffs at This Level

Stage 5 comes with freedom—but also a new kind of weight.

You're responsible for more people.

More complexity. More pressure to protect what you've built.

You're not the hero anymore. Your team is.

Your job becomes setting the direction, aligning the organization, and making the hard calls no one else can make.

It's less glory. More guidance. And if done well, it's the most rewarding version of the whole journey.



“

Whether or not you plan to sell, you should build like you will.

Let's Get Practical

Here's how to move with purpose at this level:

1. Build a Succession Plan

Ask yourself:

- If I disappeared for 90 days, who runs what?
- Who's ready for promotion and who needs support?
- What roles have no backup?
- What's my true plan for retirement, sale, or legacy?

Put it in writing. Review it annually. This is how you protect what you've built.

2. Clarify Your 3-Year Vision

Where is this business going?

- More cities?
- More trucks?
- Higher profit?
- Exit or transfer?

Write it out. Share it with your leadership team. Make it part of your quarterly rhythm.

3. Treat Culture Like a System

At this size, culture doesn't happen by accident.

You need rituals, language, and clear behaviors that get rewarded.

- Run quarterly all-hands meetings
- Develop internal leadership training
- Celebrate wins and values lived out
- Hire for alignment, not just skill

Strong culture scales everything else.

Final Thought

Stage 5 isn't about being the biggest. It's about building the most **transferable, valuable, and sustainable** version of your company.

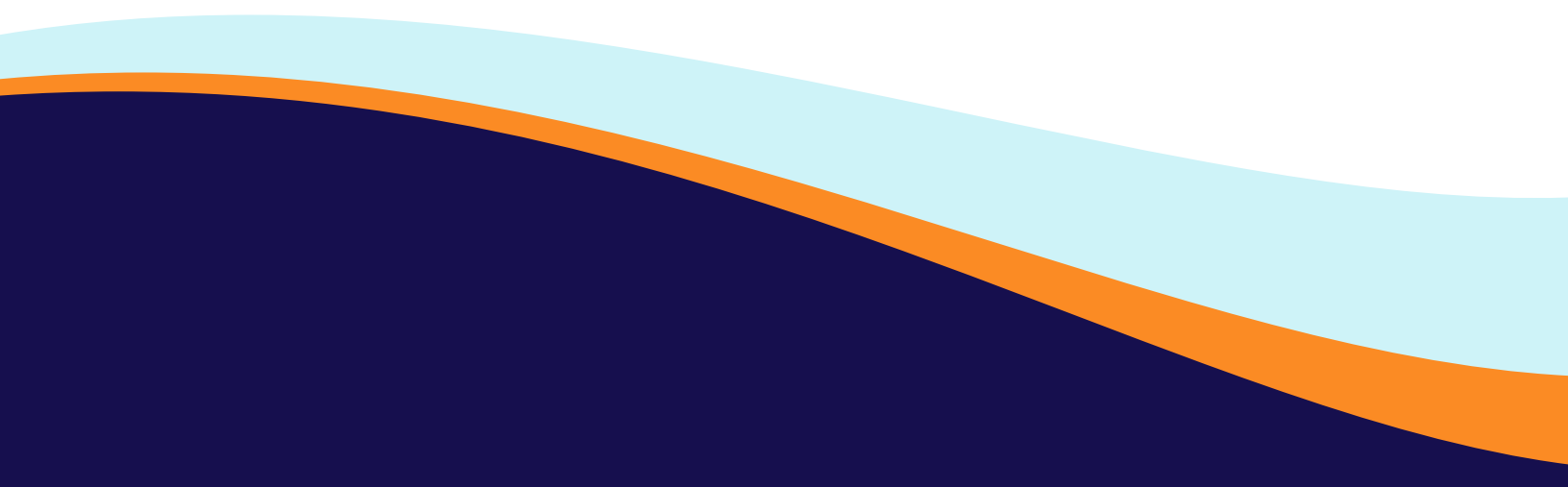
It's not the right goal for everyone. But if it's your goal—go all in.

Because the pool industry is evolving. And the companies that win the next decade won't be the ones with the flashiest marketing or the most trucks.

They'll be the ones that build intentionally. Lead wisely. And create businesses that work with or without them.

If that's the path you want...you now have the roadmap.

Let's finish strong in the final chapter.



PART TWO: THE 5 STAGES OF POOL BUSINESS SUCCESS

FINAL CHAPTER

Where Do We Go From Here?



Final Chapter

You made it. You've read through every stage, from solopreneur to systematized enterprise. And if you've gotten this far, it means you're serious—not just about growing a pool company, but about building something intentional, sustainable, and yours.

Now comes the part no one else can do for you. **You have to decide where you're going and why.**

Revisit Your Owner's Intent

Back in Part One, we talked about **Owner's Intent**—your personal definition of success. Now that you've seen the full map, it's time to return to it.

Each stage has its own rewards. Each stage comes with tradeoffs. There's no right answer—only the answer that fits you.

You've seen that:

- Some stages offer more freedom. Others bring more complexity.
- Some increase profit. Others increase pressure.
- Some require a bigger team. Others require better systems.

If you don't clarify your intent, growth will become guesswork.

And even if you "succeed" by outside standards, you may not feel successful at all.

You Have to Choose

Let's make it plain one last time:

- Want to stay a one-person shop with a loyal route and a flexible life? Perfect.
- Want to build a \$5M brand with a full leadership team and multiple markets? Great.
- Want to sell in 3 years, or pass the business to your kids in 20? Amazing.
- Want to build a profitable, low-stress company that supports your family and gives you Fridays off? Beautiful.

They're all valid. But they require different choices.

So choose.

Not once—but often.

Make space regularly to ask yourself: *Is this still what I want?*

Because your business should serve your life—not the other way around.

“

You have to decide where you're going—and why.

Reflect and Refocus

Here are a few questions to guide your next steps. Use them alone, with a business partner, your spouse, or your leadership team.

Owner's Intent

- What do I want this business to give me?
- What does success look like in 3, 5, and 10 years?
- If my business disappeared tomorrow, what would I regret never building?
- Am I building something to keep, to sell, or to pass on?

Stage Awareness

- What stage am I in right now?
- Which challenges do I face daily? Which chapter described them the best?
- What would need to be true for me to move to the next stage?
- Am I content here, or am I restless?

Leadership + Team

- Who are the people I can't build the future without?
- Where am I still the bottleneck?
- Have I built real leaders—or just helpers?
- Who do I need to hire, promote, or coach?

Culture + Systems

- Is our culture intentional—or just inherited?
- Are we operating on systems, or on memory and habit?
- Where does tribal knowledge still exist?
- What habits could create better alignment?

Strategy + Future

- Do I want to expand services or go deeper with what we already do?
- Should we grow in this city, this state, or beyond?
- How does our business model need to evolve?
- What's the next bold decision I need to make?

Final Words

You don't need all the answers right now. But you do need to know:

- What you're building
- Why you're building it
- And what stage you're in

Because when you have clarity on those three things:

- Problems become solvable
- Opportunities become intentional
- Growth becomes aligned

The pool industry is full of talented, hardworking people. And we believe the future belongs to companies that lead with purpose, grow with wisdom, and build with intention.

You can be one of them.

Let's keep building.



Questions to help you get the most out of the content in this book

Owner's Intent

- Why did I start (or take over) this business?
- What kind of work do I want to do more of—and what do I want to do less of?
- What would 'success' look like in 3 years?
- What would a business that supports the life I want actually look like?
- What am I not willing to sacrifice for this business?

Stage Awareness

- Which stage of business am I currently in?
- What are 2–3 signs or symptoms that confirm this?
- What did I learn about this stage that I hadn't considered before?
- What key systems, skills, or habits am I missing at this stage?
- What fears or false beliefs might be keeping me stuck here?

Leadership + Team

- Where am I still the bottleneck in my business?
- What decisions still rely solely on me?
- Who on my current team could grow into a leadership role?
- What leadership qualities do I need to strengthen in myself?
- If I took 30 days off, what would break—and why?

Culture + Systems

- Do I have a clearly defined culture—or just a vibe that changes week to week?
- What unspoken rules or norms shape the way we work?
- What recurring problems could be solved with a better system?
- Where are we relying too heavily on 'the right person' instead of the right process?
- What's one communication rhythm we could start that would improve alignment?

Strategy + Future

- What do I want to be true about my business in 5 years?
- What new services, locations, or models am I excited about?
- What would I need to systematize in order to scale?
- What partnerships, tools, or talent would unlock that growth?
- What's one bold move I've been putting off?

Commitments

- What stage am I in today—and how do I know?
- What's the clearest version of my Owner's Intent right now?
- What's one system I need to improve in the next 30 days?
- What's one leadership habit I want to strengthen?
- What's one brave move I'll commit to making in the next 90 days?

About The Creators Of This Book

At **Skimmer**, we believe pool service professionals deserve better tools, better support, and better business outcomes. That's why we built the leading software platform specifically for pool and spa service companies.

Over **30,000 pros across North America** rely on Skimmer to streamline their routes, get paid faster, and scale their operations—all while delivering consistent, professional service to their customers. Our mission is simple: modernize the industry and empower the people who keep it running.

Casey Graham has spent his career building companies that grow fast and make an impact. He's launched, scaled, and exited businesses across four different industries—including his most recent venture, Yummy Pools, which expanded rapidly in the Atlanta market and was later acquired by Trivest.

Now, as VP of M&A for the Yummy Pools platform, Casey is focused on helping other pool companies grow and thrive through acquisition and operational excellence. He brings real-world insight from the front lines of pool business ownership, along with a strong sense of purpose rooted in family, community, and his own "why."

We decided to collaborate on this ebook because we share a belief: building a successful pool service business isn't only about profit—it's about clarity of purpose, consistency in execution, and the right systems to support your goals. Whether you're just getting started or leading a growing team, we hope this guide helps you reconnect with the reasons you started and equips you with practical strategies to move forward.

