



The Valuable Pool Business Checklist

DEAL DYNAMICS

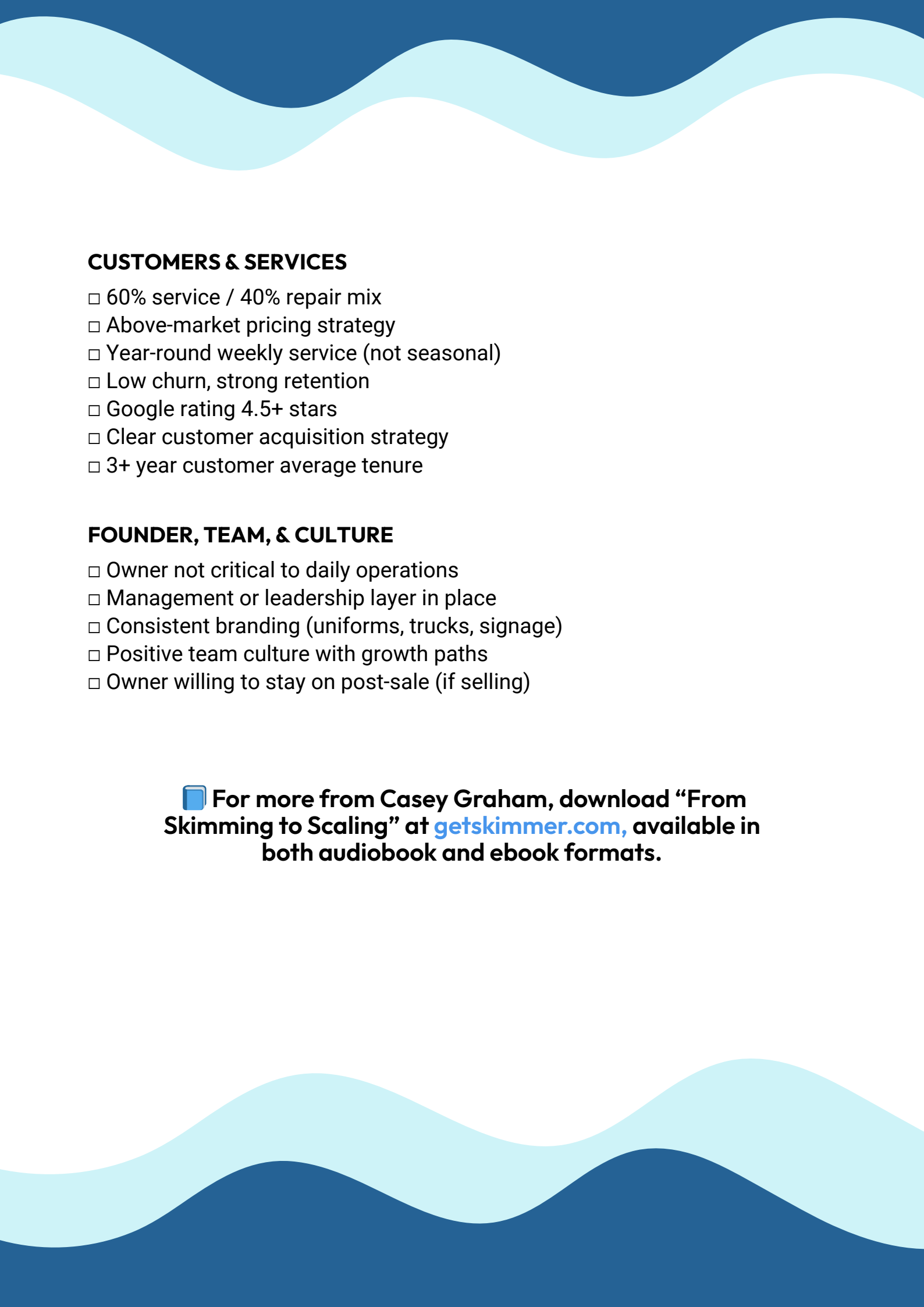
- ☐ Clear reason for sale (not burnout)
- ☐ Organized financial and operational data
- ☐ Clean tax history
- ☐ Realistic expectations about valuation

FINANCIAL PROFILE

- ☐ Annual revenue over \$1M
- ☐ EBITDA over \$250K
- ☐ MRR growth year-over-year
- ☐ Repair margins at 30–50%
- ☐ Comprehensive insurance coverage
- ☐ Fully W-2 employee structure

OPERATIONS

- ☐ Employee tenure 3+ years
- ☐ Low turnover (<20%)
- ☐ Formal training program and documentation
- ☐ Consistent pay structure
- ☐ Tech platform (e.g. Skimmer) managing routes, billing, and comms
- ☐ Automated billing and payments
- ☐ No legal disputes



CUSTOMERS & SERVICES

- ☐ 60% service / 40% repair mix
- ☐ Above-market pricing strategy
- ☐ Year-round weekly service (not seasonal)
- ☐ Low churn, strong retention
- ☐ Google rating 4.5+ stars
- ☐ Clear customer acquisition strategy
- ☐ 3+ year customer average tenure

FOUNDER, TEAM, & CULTURE

- ☐ Owner not critical to daily operations
- ☐ Management or leadership layer in place
- ☐ Consistent branding (uniforms, trucks, signage)
- ☐ Positive team culture with growth paths
- ☐ Owner willing to stay on post-sale (if selling)

 For more from Casey Graham, download “From Skimming to Scaling” at getskimmer.com, available in both audiobook and ebook formats.