Pre-sale preparation checklist

Decide which shop records can stand up to a buyer’s questions before you share a price.

Shop / location

Review date

Prepared by

Before you discuss price

☐ Rebuild one month of sales

Tie closed repair orders, refunds and fleet billings to your ledger. Bridge merchant fees, sales tax and deposits in transit to the bank statement.

Evidence / next action

☐ Price the work you still do

Pull billed hours under your tech ID, list unpaid service-writing duties and obtain a local loaded wage estimate for each role.

Evidence / next action

☐ Test every add-back

Pair the ledger entry with an invoice and a brief explanation. Keep recurring expenses and personal assertions out of your verified total.

Evidence / next action

☐ Walk every bay

Record lift IDs, inspection dates, alignment licenses and shop-owned tools. Set aside personal toolboxes, rentals and financed assets.

Evidence / next action

Open item, responsible person and due date

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Before you invite a buyer

☐ Secure permission to share

Redact technician names and customer contact details. Agree on who approves a release and who may speak to employees or fleet customers.

Evidence / next action

☐ Read your occupancy terms

Find the signed lease, amendments and guaranties. Ask counsel to mark consent, remaining options, rent resets and notice dates.

Evidence / next action

☐ Assemble your environmental file

Gather used-oil pickup records, equipment removal receipts, drain plans and agency letters. Give open issues a named owner.

Evidence / next action

☐ Test a handoff

Let your lead run service dispatch while you observe. Record what stalled, who made the decision and what would make the next shift independent.

Evidence / next action

Open item, responsible person and due date