TRANSFEROS

Clean financials. Fragile operating transfer.

Many small businesses sell with solid numbers while the seller's judgment stays undocumented: when a discount is allowed, which customer gets special handling, which vendor is trusted, when the owner quietly intervenes. That gap surfaces after close — as buyer anxiety, seller fatigue, and deals that wobble.

What TransferOS does

A paid Qualification Audit that tests whether operating knowledge can be reconstructed from real records, representative cases, and targeted seller/operator correction. It produces:

- A data-rights and scope check before sensitive records move
- A metadata-first view of available evidence
- Representative cases from actual workflows
- Source-linked operating claims with confidence and risk
- Specific correction questions for the seller
- A transition-risk recommendation — including decline

Best fit

- Owner-led service businesses, 3–50 employees
- Buyer under LOI or recently closed

Why brokers care

- Serious buyers get a clearer post-close transition plan
- Buyer anxiety around founder dependency goes down
- The seller's tacit knowledge transfers without an open-ended brain dump
- A diligence workstream that complements — never replaces — QoE, legal, and lending
- Post-close success protects your reputation and referrals

- Records in systems like ServiceTitan, QuickBooks, Jobber, HubSpot, or shared drives
- Seller willing to answer targeted correction questions

Example: HVAC / plumbing acquisition

TransferOS might reconstruct pricing exceptions for compressor replacements, callback routing for warranty jobs, dispatch overrides during peak weeks, and special handling for at-risk customers. Some claims become source-linked and usable; others stay blocked until the seller corrects them.

The ask: introduce us to one buyer who is worried about what happens after the seller leaves. We start narrow — three workflows, representative cases, and a clear go/no-go on whether operating judgment can be reconstructed.
