

LET'S GROW!

Franchise Sales & Development Assembly

SESSION AGENDA

Title Sponsor:



LET'S GROW!

Franchise Sales & Development Assembly

OTHER LOCATION

TRINITY

GUADALUPE/
BRAZOS/
COLORADOSAN MARCOS/
PECOS

SUNDAY, FEBRUARY 2

3:00-5:00 PM: Franchising for Good | PADDOCK BARN

5:00-9:00 PM: Registration | PADDOCK BARN

7:00-9:00 PM: Barn Party | PADDOCK BARN

Sponsored by Prospect Direct

Music by Matt Martin, Followed by Karaoke

MONDAY, FEBRUARY 3

7:00 AM-5:00 PM: Registration | ROOM: ALCOVE

7:30-8:30 AM: Breakfast with Sponsors | ROOM: TRINITY

Sponsored by Cadence Bank

8:00-8:20 AM: Welcome & Introductions

Liane Caruso & Michael Hyam, Franchise Assembly | ROOM: TRINITY

8:20-9:15 AM: Turning Leads into Leaders: Supporting Franchises Through the Franchise Cycle

Gigi Schweikert, Lightbridge Academy | ROOM: TRINITY

Join us for a dynamic workshop that takes you from "maybe" to mastery in franchise development. Learn how to coach franchisees through every twist and turn of the franchise journey with strategies that are as practical as they are productive. Because happy franchisees = successful franchisors (and fewer 3 a.m. calls)!

9:15-9:25 AM: Break/Networking

9:25-10:15 AM: Enhancing Franchise Sales with CRM and Automation

Jamshaid "Jam" Hashmi, ClickTecs & FranchiseSoft | ROOM: TRINITY

In today's competitive franchise landscape, having an optimized CRM and automated sales process is crucial for driving growth. Jam Hashmi, a seasoned expert with over 20 years in the franchising industry, has a wealth of experience from franchise sales to building a digital marketing agency and developing a franchise management software used by nearly 200 brands. His session will cover the essential steps to set up and maximize a franchise CRM, streamline the sales process through automation, and harness data to inform marketing and sales strategies. Attendees will learn actionable strategies to enhance lead management, improve conversion rates, and make data-driven decisions that propel franchise growth. Discover how technology and data can be the cornerstones of your franchise success.

9:25-10:15 AM: Building Your Franchise Development Team for Success

Greg Cook, CFE, Susan Stilwell, *The Franchise Source* | ROOM: GUADALUPE/BRAZOS/COLORADO

Dreaming of expanding your brand through a thriving franchise network? Building a high-performing franchise development team is the key to unlocking that potential. But assembling the right team and nurturing their success requires more than just hiring skilled individuals. It's about creating a dynamic, results-oriented culture where clear expectations, data-driven insights, accountability, continuous learning, and a spirit of collaboration pave the way for explosive growth. Join this insightful presentation and discover the winning formula for building a franchise development team that achieves the success you've been hoping for.

9:25-10:15 AM: Lead Gen Best Practices: How We Generated Over 500,000 Qualified Leads

Pamela LaBelle, *Biz Sold* | *Business Exchange* | ROOM: SAN MARCOS/PECOS

In this session, Pam LaBelle will guide attendees through actionable lead generation strategies critical to franchise development. The session will cover effective use of email marketing, Facebook advertising, and leveraging verified leads. Attendees will learn the importance of diversifying traffic sources, personalized communication, and face-to-face interactions at trade shows. The session will also focus on nurturing leads through automation and common pitfalls like slow follow-up. Pam will provide practical tools to streamline franchise sales and improve lead quality for sustained franchise growth.

10:20-11:10 AM: From Personal Brand to Franchise Expansion: Maximizing LinkedIn's Potential

Brooke Janousek, *Garage Experts* | ROOM: TRINITY

Executive franchise marketer, Brooke Janousek, explores how franchise leaders can leverage LinkedIn to build a strong personal brand, establish credibility, and drive franchise growth. This session will cover strategies for optimizing profiles, creating engaging content, and using LinkedIn's networking tools to connect with potential franchisees, partners, and industry influencers. Attendees will learn actionable tips for positioning themselves as thought leaders and utilizing LinkedIn as a powerful platform for franchise expansion.

10:20-11:10 AM: Show me the Money! The Do's and Don'ts of Financial Performance Representations

Marisa Faunce, *Plave Koch* | ROOM: GUADALUPE/BRAZOS/COLORADO

You've seen franchise advertisements with bold earnings claims and tiny disclaimers. Is that legal? This session will cover the rules for preparing financial performance representations and using financial data in the franchise sales process. Tips, techniques and samples will give you what you need to take your FPR to the next level.

10:20-11:10 AM: A.I. Use Cases for Franchise Growth

Joe Lee, *Locate.ai* | ROOM: SAN MARCOS/PECOS

Joe Lee joins us to give a session about everything A.I. We will explore the best A.I. use cases and practical know-how in real estate expansion, as well as innovative applications in our daily professional lives. Joe is the founder and CEO of Locate.ai, the #1 real estate provider for franchisors by Entrepreneur, and holds a BS in Computer Science from Stanford.

11:10-11:20 AM: Break/Networking

11:20 AM-12:20 PM: Franchise Growth Roundtables | ROOM: TRINITY

12:20-1:25 PM: Lunch/Trivia**Sponsored by** *FranchiseClique.com***David S Schwartz, FranchiseClique.com** | ROOM: TRINITY

Step away from the usual presentations and join us for an electrifying trivia experience that's as engaging as it is entertaining! Put your knowledge to the test with fast-paced, interactive trivia questions covering a mix of topics. It's not just a game—it's your chance to connect, compete, and test your knowledge! Whether you're a trivia master or just love a good challenge, this event promises fun, laughs, and surprises. Bring your A-game, a big smile, and get ready to make this the most memorable session at the expo. Trivia has never been this exciting—don't miss out!

1:25-1:35 PM: Break/Networking**1:35-2:25 PM: Finding the Right Funding Partner: How the Right Funding Partner Can Help You Grow Your Brand****Dave Woggon, Steve Bowles, Tenet Financial Group** | ROOM: TRINITY

Securing funding is the final step in turning franchise dreams into reality. Join industry experts from Tenet Financial Group for an insightful session on navigating the complexities of franchise funding. Learn the do's and don'ts of franchise financing, how to identify viable candidates, and the critical role of a funding partner in the process. Explore various funding options and combinations, along with practical guidelines for successful funding. By the end of this session, you'll have the tools to streamline the funding process, avoid common pitfalls, and help franchisees secure the resources they need to succeed.

1:35-2:25 PM: 2025 Lead Generation Trends Every Franchise Development Professional Should Know**Kirk Allen, Reshift Media** | ROOM: GUADALUPE/BRAZOS/COLORADO

Back by popular demand, this session explores strategies for finding and converting qualified franchisees in a rapidly changing digital landscape. Drawing on data from over 200 franchise organizations, it covers AI's role in lead generation, where prospective franchisees are researching online, and which digital platforms are rising or declining in effectiveness. Attendees will also learn which platforms deliver the best cost-per-lead and strategies top franchise systems are using to attract the best franchisees. Ideal for franchise development professionals looking to stay ahead of market trends through 2025.

1:35-2:25 PM: Brand Building Strategies for Franchise Growth: From Identity to Impact**Amanda Bialek, Beth Morino, Konnect Agency** | ROOM: SAN MARCOS/PECOS

This session will cover fundamental marketing concepts including tips on defining a brand, creating a consistent brand message, leveraging local marketing opportunities, and using social media effectively. Attendees will walk away with actionable insights and practical tools to start building (or enhance) a strong brand presence for their concept.

2:30-3:20 PM: Development + Operations = True Love Forever**Panelists: Jereme Shelton, Todd Lamson, ohDeer Development Corp; Amy Mosley, DreamMaker Bath & Kitchen****Facilitator: Michelle Rowan, Franchise Business Review** | ROOM: TRINITY

In franchising, the collaboration between development and operations is key to driving long-term success for franchisees and the brand. When these teams work in harmony, internal collaboration improves, franchisee support strengthens, and profitability increases. This session features top executives from both departments sharing strategies to align goals, streamline communication, and establish shared KPIs. Learn actionable methods to break down silos, foster collaboration, and enhance the franchisee experience. Real-world examples from leading brands will demonstrate how integrating development and operations can drive growth and success across your system. Walk away ready to build a more cohesive, effective organization.

2:30-3:20 PM: How to Nurture Your Franchise Leads Like a Pro

Corey Nicholson, Cindy Hill, Mackenzie Allsop, Cadence Franchising | ROOM: GUADALUPE/BRAZOS/COLORADO

You've invested in franchise lead generation and it's starting to work. Now what? Filling the top of the funnel is just the first step in your recruitment process. What methods are you utilizing to nurture your leads and advance them through your pipeline? Learn from experts about modern strategies that are driving actual results. Get insights drawn from real-world use cases and leave with actionable tips & tricks to engage and convert qualified franchise candidates.

2:30-3:20 PM: Automation & AI: The Franchise Playbook for Scalable Growth

Josie Van Scholten, Eric Salas, Valenta | ROOM: SAN MARCOS/PECOS

Automation and AI hold the key to unlocking new levels of efficiency and profitability for franchisors. But how do you know if your franchise is ready to take the leap? In this engaging and interactive session, we'll walk you through our comprehensive readiness guide, helping you identify gaps and opportunities within your operations. You'll leave with a clear understanding of how to get your business ready for automation and AI to streamline workflows, boost productivity, and ultimately enhance your bottom line. Through group exercises and dynamic discussions, you'll gain the tools needed to maximize these technologies in your franchise.

3:25-4:15 PM: After the FDD: Streamline New Store Openings

Panelists: Ty Brewster, FranReal; Tim Matey, FC Dadson; Karen Booze, AnswerConnect; Kater Danford, Northeast Color

Facilitator: Karen Wenning, Suttle-Straus | ROOM: TRINITY

This session offers a step-by-step guide to efficiently opening new franchise locations by addressing five critical areas. Attendees will gain insights into selecting the ideal location using market research and site analysis, managing construction timelines, and sourcing the right furniture, fixtures, and equipment (FF&E). The importance of consistent signage and trade dress to maintain a strong brand identity will be emphasized. Additionally, strategies for handling inquiries and building a customer base before opening day will be explored. Moderated by an industry expert, this panel discussion by leading service providers will provide franchisors with actionable tools to streamline the store opening process for success.

3:25-4:15 PM: Using your FDD as a Sales Tool

Amy Cheng, Antonia Scholz, Cheng Cohen LLC | ROOM: GUADALUPE/BRAZOS/COLORADO

How is your FDD viewed by potential franchisees? This session prepares you to answer tough questions about your FDD and engage in meaningful discussions with prospects about all the information, including Item 19 financial data.

3:25-4:15 PM: Strategic Clarity: Knowing Which Franchise Marketing Tactics Drive Revenue and Which Support It

Elyse Lupin, MBA, CFE, Elysium Marketing Group | ROOM: SAN MARCOS/PECOS

This dynamic session reveals how to prioritize marketing tactics for maximum impact, showing you what's essential for driving revenue and what enhances the journey. Learn from real-world examples and expert insights on identifying core, must-have strategies versus complementary "nice-to-haves" that boost your brand. Attendees will leave empowered to cut through the noise, invest in high-impact initiatives, and build a streamlined, results-focused marketing plan that fuels growth across franchise networks.

4:20-5:10 PM: Who is The One? Franchise Discovery Days and the Path to Approval

Panelists: **Mitch Benson**, *A Place At Home*; **Seth Holan**, *Wild Birds Unlimited*;
Kim Collier, CFE, *Ducklings Early Learning Centers*

Facilitator: **Marcia Mead**, **Stephanie Ryan**, *M Squared Franchise Consulting* | ROOM: TRINITY

You have a funnel full of interested potential franchise owners. How do you know if they are your Wildest Dream or destined to be Trouble? Discovery Day is your moment to determine if a candidate is ready to step into your brand's spotlight. This session will dive into the art and science of evaluating potential franchise owners, from building the perfect Discovery Day experience to making the critical decision to say, You Belong With Me. Join our dynamic lineup of seasoned panelists as they share insights, strategies, and stories about making the right call. You'll leave with actionable tips and a playlist of best practices for your next Discovery Day.

4:20-5:10 PM: How to Build a Lead Gen Engine that Fuels Franchise Expansion

Joseph Mohay, MBA, *Ignite Visibility* | ROOM: GUADALUPE/BRAZOS/COLORADO

In this session, we'll dive into the 5 most effective marketing channels to drive quality franchise leads and accelerate your development pipeline. Backed by real-world data and proven strategies, you'll learn where to invest your time and budget for maximum ROI. Attendees will leave with actionable insights to identify their ideal prospects, optimize their marketing efforts, and build a lead generation engine that scales. Whether you're looking to attract new franchisees or refine your current approach, this session will equip you with practical tools to fuel sustainable growth.

4:20-5:10 PM: Thinking Strategically to Grow Faster, Drive Revenue, & Create Efficiencies in Your Business

Kimberly Hill, *Infiniti HR* | ROOM: SAN MARCOS/PECOS

How can small businesses access Fortune 500-level resources and purchasing power? This session explores the power of aggregation—leveraging collective buying to secure wholesale pricing and reduce costs. Discover how outsourcing to aggregators enables small businesses to compete with large enterprises while accessing top-tier resources. We'll also address the critical concept of being the “source of the wage” and its associated liabilities, including compliance risks and cost implications. Attendees will gain insights into calculating total labor costs, which extend beyond wages to include taxes, insurance, and more. Learn to think strategically and leverage innovative tools to optimize your bottom line.

6:00-8:00 PM: Networking Party | BIG SHOTS

Sponsored by *Northeast Color & Suttle-Straus*

TUESDAY, FEBRUARY 4

7:00-8:00 AM: Breakfast with Sponsors | ROOM: TRINITY
Sponsored by *Bank of America*

8:00-8:50 AM: 5 Best Practices of Fran Dev Teams that Crush It

Dave Hansen, *ClientTether* | ROOM: TRINITY

Ever wonder how a single consultant can close 65 territories by himself in a year, how some emerging brands award 230 locations in 20 months, or how some FranDev teams 3X their franchise sales year over year without changing team size or marketing budgets? Join Dave Hansen, CEO of ClientTether, in this session to learn the behaviors, processes, and tools these market leaders are using to scale their FranDev teams and stay ahead of market headwinds and regulatory changes coming our way in 2025.

8:00-8:50 AM: Leveraging AI Tools to Create Engaging Training Content

Doug Mark, Cassie Mark, *Learning Zen* | ROOM: GUADALUPE/BRAZOS/COLORADO

LearningZen President, Training enthusiast and AI advocate Doug Mark takes you on an exploration of AI content creation tools. Learn about the power of chat-based prompting tools to create training videos, outlines, avatars, scripts, timelines, language transcriptions, voiceovers, quiz questions and so much more. There are so many AI creation tools on the market and people are starting to understand that there's not one tool for every job you need the right AI tool for the job. Let's look at some huge time-saving and simple-to-use AI content creation tools. Let's explore the future of content generation together.

8:00-8:50 AM: M&A Implications For Your Franchise Development Process

Alicia Miller, *NACD.DC, CMAA, CFE, Emergent Growth Advisors* | ROOM: SAN MARCOS/PECOS

Private equity has become a powerful force in franchising, but what does this mean for franchise development teams today? In this dynamic session, we'll explore how sophisticated buyers evaluate your franchisee talent, sales process, and development funnel. Through case studies and a "reverse engineering" of the PE valuation process, you'll uncover how enterprise value can be created—or destroyed—by your approach to franchise sales. Key takeaways include understanding the math of royalty contribution, sales commissions, and franchisee support, as well as creating a realistic growth plan. Whether or not you plan to partner with private capital, this session offers valuable insights into building a sustainable and attractive business.

8:55-9:45 AM: Franchise Development and Marketing Alignment: The Power Duo

**Panelists: Jack Humbert, *Empower Brands*; Carrie Evans, *Dine Growth Group*;
Jim DiRuggeris, *Amanda House, Lightbridge Academy***

Facilitator: Jeff Horst, *Thryv* | ROOM: TRINITY

In today's competitive market, the synergy between franchise development and marketing is more critical than ever. Join top executives from leading franchise brands as they reveal how aligning these two functions drives brand growth and improves franchise recruitment. This panel will explore best practices for collaboration, crafting unified messaging, and leveraging data to attract and engage the right candidates. Learn how successful brands integrate development goals with marketing strategies to optimize lead generation, nurture prospects, and close deals. Walk away with actionable insights to break silos, enhance teamwork, and unleash the full potential of your franchise growth engine.

8:55-9:45 AM: Insider's Playbook: Geo-Targeting in Franchise Development Marketing

Madeleine Zook, *Rolling Suds* | ROOM: GUADALUPE/BRAZOS/COLORADO

Struggling to grow your franchise in key markets despite your best marketing efforts? You're not alone—this is one of the toughest challenges in franchise development. After years of research and hands-on testing across diverse industries and budgets, Madeleine has crafted a proven blueprint for effective geo-targeting. By the end of this session, you'll walk away with a practical, results-driven marketing playbook packed with actionable strategies to drive your geo-targeting success in 2025.

8:55-9:45 AM: The Franchise Growth Framework: Predictably Convert Prospects into Raving Franchisees through Automation

Renée Boudakian, *Rubicon Franchise Partners* | ROOM: SAN MARCOS/PECOS

During this session, you'll learn about the Franchise Growth Framework, a proven system powered automation that seamlessly and subtly turns franchise leads into raving franchise partners. Discover the top three automations that every franchisor must implement to predictably maximize franchise sales.

9:50-10:40 AM: From Inquiry to Sale: Optimizing the Prospect Journey

Panelists: Kelly Tope, *Full Speed Automotive*; Paul Dorsey, *Jantize*; Jania Bailey, *FranNet*; Rob Lancit, *Stratus Building Solutions*

Facilitator: Jamshaid "Jam" Hashmi, *ClickTecs & FranchiseSoft* | ROOM: TRINITY

Discover how top franchise brands streamline the franchise development process to turn inquiries into successful franchise sales. In this dynamic panel discussion, industry-leading executives will share proven strategies for creating a seamless and engaging franchisee journey. Topics include crafting compelling first impressions, leveraging technology for lead nurturing, and building trust through transparent communication. Attendees will gain actionable insights into personalizing the candidate experience, overcoming common obstacles, and maintaining momentum through the sales cycle. Whether you're a CEO, sales leader, or marketer, this session offers valuable tools to elevate your franchise development strategy and drive sustainable growth.

9:50-10:40 AM: 3 Things to Do (Or Die) in Franchise Development Marketing

Garrett Gillin, MBA, Jon Vogel, MBA, *units. & 215 Marketing* | ROOM: GUADALUPE/BRAZOS/COLORADO

In this session, learn how to craft a franchise marketing strategy that drives results, starting with clear, measurable goals. Gain insights into understanding demand and evaluating audience size to target the right candidates effectively. Explore key marketing channels, including paid search, directories, and social media, and learn how to build realistic assumptions for your campaigns. Discover the essential assets required—such as a website and attribution tools—and how to use them to track and measure success. Walk away with a practical framework for developing and executing a data-driven marketing plan tailored to your franchise growth objectives.

9:50-10:40 AM: Tools, Tech, and Processes for your Brand

Monty Miller, Madhav Surapaneni, *Orchatect* | ROOM: SAN MARCOS/PECOS

Unlock the power of a well-integrated franchise technology stack to drive operational efficiency, improve communication, and maintain brand consistency. This session will explore how leveraging a unified tech stack can streamline processes, enhance data sharing, and provide insights for informed decision-making. Discover how franchisors can ensure compliance, support franchisees with essential tools, and achieve operational excellence. Learn why a robust technology infrastructure is key to sustaining growth, enhancing the franchisee experience, and maintaining brand integrity across all locations.

10:45-11:35 AM: Beyond Emerging: Keys to Grow and Expand your Brand

Dawn Abbamondi, Shannon Wilburn, Joanne Hoyer, *SMB Franchising* | ROOM: TRINITY

As a franchise founder or executive, lean into the people who have been there and done that. The team at SMB Franchise Advisors has worked with over 500 brands in all stages of growth helping them bring on 1000s of franchisees in the U.S.A. and internationally. This session offers straightforward, actionable takeaways that can be put into place immediately, plus strategies to continue expansion for 2025 and beyond. From retail to restaurant and home services to professional brands, founders work with SMB because of their insights, relationships and experience.

10:45-11:35 AM: Ten Reasons Why You're Not Making More Franchise Sales and What to Do About It

Art Coley, *ROS® powered by CGI Franchise* | ROOM: GUADALUPE/BRAZOS/COLORADO

In this session, Art Coley will share the key reasons why your franchise development team isn't selling more franchises. He will share specific examples of questions, statements, and language patterns that you can train your team to get to the heart of the concerns franchise candidates have. He will also show you how to better position and present information about your franchise while scheduling your next presentation in the Discovery Process while simultaneously building excitement about joining your brand, and specific examples of how to create urgency so that they want to buy your franchise now. If you've been struggling with consistency in hitting your new franchise sales goals, this presentation will give you the tools to get back on track and shatter your sales records in 2025.

10:45-11:35 AM: Franchise Sales During Dark Periods

Megan Center, *Quarles & Brady LLP* | ROOM: SAN MARCOS/PECOS

This presentation, titled "Franchise Sales During Dark Periods," explores the legal and practical challenges franchisors face when franchise sales are restricted due to regulatory requirements. We will define "dark periods," outline compliance obligations, and highlight strategies for managing franchise sales during these times. Attendees will learn how to communicate effectively with prospective franchisees, maintain brand engagement without violating regulations, and avoid costly penalties. We'll also discuss the use of compliance technology and best practices to proactively prevent issues. The presentation concludes with key takeaways, actionable advice, and a Q&A session for in-depth discussion.

11:35-11:45 AM: Break/Networking

11:45 AM-12:45 PM: Lunch | ROOM: TRINITY

Sponsored by *Profit Keeper*

12:15-12:25 PM: Welcome to Day 2

Liane Caruso & Michael Hyam, *Franchise Assembly* | ROOM: TRINITY

12:25-1:00 PM: Ask Me Anything: Insights from Franchise Development Executives

Panelists: Keith Dziki, CFE, *Wireless Zone*; Jonathan Weathington, *Shuckin' Shack Oyster Bar*; Christina Chambers, CFE, *DOXA Talent*; Amy Elder, CFE, *Papa John's*; Paige Robinson Dosch, CFE, *American Family Care*; Pete Baldine, *Moran Family of Brands* | ROOM: TRINITY

Get ready for an engaging and interactive session where you'll have the opportunity to ask top franchise development executives your burning questions. This open-format panel brings together seasoned leaders to share their expertise, experiences, and candid insights on topics ranging from lead generation and franchisee recruitment to navigating market challenges and driving system-wide growth. Whether you're curious about emerging trends, best practices, or real-world problem-solving, this session is your chance to gain valuable perspectives from industry veterans. Don't miss this unique opportunity to learn from the best and take actionable advice back to your franchise development strategy.

1:05-1:55 PM: AI Power Moves: Architect Your 2025 Breakthrough

Ingrid Schneider, Patti Rother, *Stay in Your Lane* | ROOM: TRINITY

Stop chasing AI basics—it's time to make power moves. In this high-velocity session, watch us demonstrate the advanced AI plays that will define market leaders in 2025. We'll crack open real business cases, showcase unexpected AI applications, and reveal strategic budget allocations that maximize ROI. Bring your laptop and your boldest questions as we tackle the meaty challenges: How do you structure teams around AI? Where should your AI budget flow in 2025? Which emerging applications deliver actual value? Get answers in real-time, see live examples of next-level implementations, and craft your competitive edge while others are still figuring out the fundamentals. This isn't AI 101—it's your blueprint for market dominance.

1:05-1:55 PM: The 5 Immutable Laws of a Lead-Generating Franchise Website

Madalina Iordache, CFE, *Bright Pink Agency* | ROOM: GUADALUPE/BRAZOS/COLORADO

Is your franchise development website failing you? It's not just about looking pretty; it's about working hard as a lead-generating machine. In this session, you'll discover the 5 Immutable Laws that every successful franchise development website follows—laws that turn traffic into serious franchisee prospects. With over a decade of experience in franchise marketing, Madalina will walk you through what works (and what doesn't), leaving you with actionable takeaways. Get ready for an interactive session where we'll evaluate real websites and put these laws to the test. Can your website live up to these 5 unbreakable rules?"

1:05-1:55 PM: Revitalize to Recruit: Brand Refreshing as a Franchisee Magnet

Dawn Kane, Shelly Bythewood, *Hot Dish Advertising* | ROOM: SAN MARCOS/PECOS

In today's competitive franchise landscape, standing out is essential—not just to customers, but to prospective franchisees. Join us to explore the transformative power of a strategic brand refresh that enhances franchisee recruitment. This session will unpack the 'why' and 'how' of brand refreshing, illustrating how a fresh, relevant brand can captivate franchisees, signal growth, and build a loyal, invested franchise community. Attendees will gain insights into aligning brand identity with franchisee motivations, crafting a modern, compelling message, and avoiding common pitfalls. Don't miss this opportunity to learn how reinvigorating your brand can attract the right partners for sustainable growth.

2:00-2:50 PM: Key Growth Strategies For Emerging Franchisors

Mike Bickford, Mike Brugger + Panel, *Accurate Franchising* | ROOM: TRINITY

Learn the top growth strategies for growing your emerging brand to the next level from a franchisor with over 4 decades of franchising experience. Get exposed to the importance having a focused approach to both growing your franchise system, but also having an equal approach on making sure you have a successful foundation of franchisees in your network to continue to build your brand from.

2:00-2:50 PM: Lights, Camera, Conversion: The Power of Real Stories in Franchise Development

Carli Showmaker, *Showmaker Productions* | ROOM: GUADALUPE/BRAZOS/COLORADO

Authentic, real-life testimonials from successful franchisees are the cornerstone of a strong franchise development campaign. This session explores how to harness the power of franchisee stories to build trust and inspire prospective franchisees. By filming bulk content with several franchisees in just one or two days, you can create a video bank to use across your website and social media for months of marketing. Learn how to effectively capture and share these compelling narratives to fuel franchise growth and drive conversions, while maximizing your video production efforts.

2:00-2:50 PM: Establishing a New Franchise Brand for Massive Scale – Culture, Strategies, Approach, Critical Mass, Evolving Your Value Proposition and Understanding Perspective

Chris Conner, *FMS Franchise* | ROOM: SAN MARCOS/PECOS

Launching a franchise brand is one thing; scaling it for massive growth is another. This session dives into the essential elements of building a scalable franchise system, from creating a strong culture to developing strategies that drive rapid expansion. Learn how to achieve critical mass, evolve your value proposition, and adapt to market needs while maintaining brand integrity. Gain insights into fostering the right mindset and perspective to lead your franchise toward sustainable growth. Whether you're just starting or looking to scale, this session provides actionable tools and strategies to position your franchise for long-term success.

2:55-3:45 PM: The Importance of the Financial Health of Your First 10-20 Franchisees

Brook Cohen, Tyra Haizlip, *FranFund* | ROOM: TRINITY

Explore how the success of early franchisees lays the foundation for your brand's long-term growth. Qualified, well-capitalized franchisees not only validate your brand but strengthen critical items in the Franchise Disclosure Document (FDD) that lenders and prospective candidates rely on. This presentation will highlight how to ensure funding processes avoid snags and allows your candidates to reach their awarding day faster by diving into financial qualification criteria, and a deeper understanding of how funding bridges the gap between "Candidate" and "Owner". Learn how a strong start with your first franchisees can drive sustainable growth, attract quality candidates, and build a lasting, credible brand.

2:55-3:45 PM: Franchise Sales 401: Building an Advanced, Predictable, and Measurable Sales Systems

Scott Mellon, *Mellon Franchising* | ROOM: GUADALUPE/BRAZOS/COLORADO

Join Scott Mellon, Founder and President of Mellon Franchising, for a cutting-edge session on optimizing franchise sales systems for predictable, measurable growth. With over 25 years of experience across start-ups, PE-backed brands, and IPO success stories, Scott will share expert strategies for designing advanced sales programs that deliver consistent results. Discover how to leverage AI-driven lead generation to identify high-potential candidates, integrate automated and human-driven processes for seamless collaboration, and harness technology to track performance at every stage of the sales funnel. Whether scaling a start-up or growing an established brand, this session offers the tools to build a scalable, data-driven franchise sales engine.

3:50-4:40 PM: Creating and Structuring Item 19 Financial Performance Representations in your FDD

Adam J. Siegelheim, Esq., *Stark & Stark* | ROOM: TRINITY

Crafting an accurate and compelling Item 19 is a critical component of your Franchise Disclosure Document (FDD). This session provides a step-by-step guide to creating and structuring Financial Performance Representations (FPRs) that comply with legal requirements while offering valuable insights to prospective franchisees. Learn how to collect and present data effectively, avoid common pitfalls, and ensure transparency to build trust with candidates. Industry experts will share best practices and real-world examples, helping you strike the right balance between showcasing opportunity and managing expectations. Walk away with actionable strategies to enhance your FDD and attract the right franchise candidates.

3:50-4:40 PM: Make Growth Happen!**Jason Trink***a*, **Joe Gagnon**, *RaYn***maker** | ROOM: GUADALUPE/BRAZOS/COLORADO

This presentation is about a modern approach to operating within franchise systems for home-based services, focusing on lowering stress, increasing revenue, and sustaining growth. Key tactics include diversifying lead sources, improving lead quality, and speeding conversion through quick response times and well-established talk tracks. By prioritizing recurring customers or new customer acquisition, franchises boost lifetime value and retention rates. Data and analytics guide informed decision-making, helping owners optimize pricing and align marketing, sales, and operational processes. Collaborating with a dedicated sales center or partner eases workloads, strengthens brand consistency, and ensures an agile, tech-powered strategy for continuous improvement. Ultimately, it's about selling better and delivering customer experiences.

4:40 PM: Conclusion

LET'S GROW!

Franchise Sales & Development Assembly

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MONDAY, FEBRUARY 3RD, 11:20 AM-12:20 PM: FRANCHISE GROWTH ROUNDTABLES

Table	Facilitator(s)	Company	Roundtable Topic
1	Madalina Iordache & Matt Cancino	Bright Pink Agency	Navigating SEO in the Age of AI Search
2	Jam Hashmi	ClickTecs & FranchiseSoft	Franchise Lead Generation and Franchise Sales CRM
3	Dave Hansen & Keith Levenson	ClientTether	How to Scale FranDev Lead Conversion and Close Rates
4	Alexander Gulish	Consumer Fusion	How Having a Strong Reputation Helps Grow Franchise Sales
5	Elyse Lupin	Elysium Marketing Group	Why and How Brand Marketing is Important in Franchise Marketing Strategy
6	Alex Smereczniak & Chris Wright	Franzy	Using AI & Software to Enrich Leads and Optimize Costs
7	Kimberly Hill	Infiniti HR	Cutting Labor Costs and Mitigating Employer Liability in 2025
8	Joe Lee	Locate.ai	Using A.I. in Franchise Real Estate Expansion
9	Jereme Shelton	ohDEER Development Corporation	Water Drop or Shotgun; How Do You Expand into New Markets
10	Madhav Surapaneni & Monty Miller	Orchatect	Franchise Tech Stack: When, Where, What, How
11	Riley Wingerd & Emily Jones	ProfitKeeper	How to Drive Unit Profitability Within Your Brand
12	Connie Wallis	Prospect Direct	Organic Leads vs Paid Leads - Franchise Development Budget
13	Megan Center	Quarles & Brady LLP	Crafting Financial Performance Representations That Drive Development.
14	Joe Gagnon & Jason Trinko	RaYnmaker	AI in Small Business - Staying Ahead and Winning
15	Kirk Allen	Reshift Media Inc.	The Use of Landing Pages for Franchise Development
16	Lynne Shelton	Shelton Law & Associates Law Firm	Vendor Agreements & New Privacy Laws
17	Joanne Hoyer & Dawn Abbamondi	SMB Franchise Advisors	Grass Roots and Low Cost Tactics to Find and Close Your First Franchise Owners
18	Greg Cook & Susan Stilwell	TES	Accelerating Your Franchise Story – What's Your Why?
19	Matthew Jonas	TopFire Media	Best Practices to Build a Franchise Development Website That Converts
20	Renée Boudakian	Rubicon Franchise Partners	Build Better Relationships with your Franchise Prospects by Sending MORE Sales Emails

MONDAY, FEBRUARY 3RD, 11:20 AM-12:20 PM: FRANCHISE GROWTH ROUNDTABLES

Table	Facilitator(s)	Company	Roundtable Topic
21	Garrett Gillin & Jon Vogel	215 Marketing/Units	3 Things to Do (Or Die) in Franchise Development Marketing
22	Mike Bickford & Mike Brugger	Accurate Franchising	Top Focus Areas for New Franchisors in Their First 24 Months of Franchising
23	Karen Booze	AnswerConnect	Technology and Innovation: The Role of AI and Automation in Franchising
24	Steve Shumate & Hugo Somerstein	Bank of America	Preparing for Your Loan Application and the Expectations of the Process
25	Cindy Hill & Corey Nicholson	Cadence Franchising	Modern Lead Nurturing Tips & Tricks
26	Antonia Scholz	Cheng Cohen	Risks and Rewards of Working With Brokers
27	Alicia Miller	Emergent Growth Advisors	M&A Discussion - How To Get Paid For the Value You've Created
28	Tyra Haizlip & Brook Cohen	FranFund	How ROBS (Rollover for Business Startup) Can Save a Candidate
29	Dawn Kane & Shelly Bythewood	Hot Dish Advertising	Fran Dev - National vs. Regional Growth Strategies: How to Determine What's Right for Your Brand
30	Joseph Mohay	Ignite Visibility	Content That Converts: Storytelling Strategies for Franchise Growth
31	Stephanie Ryan & Marcia Mead	M Squared Franchise Consulting	What Do You Do When Your Franchise Development Discovery Process Stalls?
32	Mark Magers	Mellon Franchising	How to Repair a Broken Sales System
33	Nick Sharpe	Netsertive	Franchise Development Marketing Best Practices
34	Marisa Faunce	Plave Koch PLC	Best Practices for Franchise Resales
35	Steve Bowles & Dave Woggon	Tenet Financial	Overcoming the Fear of Funding
36	Laura Sellers & Lee Bui	The Brandit Agency	Brand Identity & AI
37	Josie Van Scholten & Eric Salas	Valenta	Building an Automation Playbook
38	Gretchen Kaufman	Xpressdocs	Local Marketing: Do I Have the Right Mix for Success?
39	Quinn Miller	Thryv	Mastering Multi-Unit Franchise Development: Opportunities & Challenges

LET'S GROW!

Franchise Sales & Development Assembly

