



LET'S GROW!

Franchise Sales & Development Assembly ■

SESSION AGENDA

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TRINITY

GUADALUPE/
BRAZOS/
COLORADO

RIO GRANDE

SUNDAY, FEBRUARY 4

5:00 PM: Registration at the Paddock Barn

7:00 PM: Barn Party at the Paddock Barn

MONDAY, FEBRUARY 5

7:00-8:15 AM: Registration & Breakfast

8:00 AM: Welcome

Liane Caruso & Michael Hyam, *Franchise Assembly*

8:15-9:00 AM: Keynote: Nothing Grows in the Comfort Zone

Michael O. Browning, Jr., *Unleashed Brands*

Join us for an inspiring presentation that will challenge you to operate with a higher sense of urgency, sharpen your focus, and identify the lead pins in your business. Embrace the grind, make small, incremental improvements, and watch your business soar to new heights. Michael, our dynamic speaker, will share invaluable insights on leadership, engagement, and the power of a winning culture. Together, we'll explore how to protect your "X Factor" and make a lasting impact on your team, candidates, and more.

9:05-9:55 AM: How Much Do You Need to Spend on Franchise Development in 2024? (Marketing)

Madeleine Zook, *Netsertive*

Join Madeleine for a TED-talk-style session on budgeting for franchise development in 2024. Madeleine will reveal average CPAs across franchise verticals, discuss high-ROI strategies, vendor accountability, and answer the question - "How do I get more qualified leads?" Madeleine's no BS approach will give you the information you're looking for so don't forget to bring your notebooks and a beer.

9:05-9:55 AM: Franchise Funding 101: How to Fund Your Franchisee Successfully (Finance)
Sam Phelps, *Tenet Financial*

Congratulations on finding the perfect franchise match! Now, as your candidates prepare to embark on their franchise journey, the critical step of securing funding awaits. Join us for an insightful session with industry experts from Tenet Financial Group, where we'll cover dos and don'ts for franchise funding, identifying viable candidates, the importance of a funding partner, exploring funding options, and fundamental guidelines for success. Gain essential knowledge to identify promising franchisees early, avoid common pitfalls, and expedite the funding process. Don't miss this chance to enhance your franchise funding expertise and set your franchisees on the path to success.

10:00-10:50 AM: Setting the Stage for Franchisee Success: No Fluff, Just Real Stuff with Candidates (Sales Process)

Michelle Rowan, *Franchise Business Review*

Panel: Kim Falk, *Beans and Brews*; Madeleine Zook, *Threshold & Home Franchise Brands*; Melissa Birchett, *School of Rock Franchisee*

Set the stage for franchisee success with real insights, avoiding fluff in the development process. Learn from a current franchisee about do's and don'ts, emphasizing transparency and authentic expectations. Discover the power of open conversations, finding strategies to set realistic expectations and avoiding common communication mistakes. Gain actionable insights to enhance the candidate experience, ensuring preparedness and building a resilient franchise system. By prioritizing transparency, attract and retain committed, satisfied franchisees for mutual long-term success and growth.

10:00-10:50 AM: Facebook isn't Dead - Debunking the Digital Marketing Myths for Franchise Development (Marketing)

Karlye Atwood, *C Squared Social*

Revive your franchise strategy on Facebook by tapping into precise data. Imagine targeting five-house owners, high-income earners, or specific demographics. Leverage Facebook's potential by integrating data from existing franchisees and qualified candidates. The true magic lies in custom segment data across the digital universe. Embrace a sophisticated, data-driven approach by collaborating with partners and customizing targeting. In the dynamic digital marketing landscape, Facebook isn't dead—it's an evolving landscape of opportunities. Learn to navigate with precision, embracing data-driven insights for franchise development success.

10:55-11:45 AM: Mastering Expansion: Using A.I.-Powered Real Estate Strategies for Franchise Growth

Joe Lee, *Locate*

A successful franchise growth hinges on a well-crafted real estate strategy. This presentation delves into creating a data-driven approach by assembling the necessary tools, technology, and infrastructure. Key questions include proactive territory creation, determining optimal location numbers and placements, assessing site success potential, and building the requisite infrastructure. Join us as we guide you through these crucial steps to enhance your franchise's chances of success.

10:55-11:45 AM: Building Your Brand Awareness: The ABCs of PR for Emerging Market Players (Public Relations)

Beth Morino, Monica Guzman Escobar, & Kim Le, *Konnect PR / StartrCo*

Emerging brands in a competitive landscape require effective Public Relations (PR) strategies for brand growth and credibility. Join our interactive workshop for practical insights and tools provided by experienced PR experts. Gain actionable insights on PR fundamentals, crafting a compelling brand story, community relations, building media connections, leveraging social media for brand amplification, and measuring PR success with data-driven approaches. Whether you're a startup founder, growing market player, or marketing professional, this workshop equips you with the knowledge to navigate the PR world and establish a strong brand presence.

11:45 AM-1:00 PM: LUNCH

12:10 PM - 1:00 PM: How the Video Content Funnel Can Maximize Franchise Sales (Marketing)

Trevor Rappleye, FranchiseFilming

Trevor Rappleye, Storyteller and CEO of FranchiseFilming, will be discussing the power of storytelling in your validation videos - and giving away his secrets during his speech! You'll have a printed workbook to follow along with and learn. More importantly, he will be talking about how videos in your content funnel and drip campaigns can help decrease your sales cycle by up to 50% and provide the validation and engagement your team needs. He will bring to the table the knowledge his team has learned by working with Neighborly, Batteries Plus, FastSigns & More. Want to learn more? Text VIDEO to 88500

1:00-1:10 PM: BREAK

1:10-2:00 PM: Speed Networking

2:05-2:55 PM: “The Ultimate ‘Why’ – How Successful Family Owned Franchise Brands Build a Meaningful Culture and Execute Effective Growth Strategies” (Sales Process)

Graham Chapman, 919 Marketing

Panel: Mark Bollman, *Creative Colors Int'l*; Matt McCollum, *Bodybar Pilates*; Pete Baldine, *Moran Family of Brands*; Mike Mushinski, *Accurate Leak and Line*

Come check out a rock star panel of experienced franchisors (Pete Baldine of Moran Brands, Matt McCollum of BODYBAR Pilates, Mark Bollman of Creative Colors International, and Mike Mushinski of Accurate Leak and Line) who know what it takes to amplify the positives of family-owned and operated franchise concepts. Listen in as they describe the challenges they've encountered, lessons they've learned, and successes they've enjoyed working for the family, working alongside other family members, or both. Considering the personalities involved (including Graham Chapman of 919 Marketing, who is moderating the session), expect a fun crowd, a lot of laughs, and multiple meaningful takeaways (including how to refine and articulate a brand story that resonates with aspiring business owners).

2:05-2:55 PM: How Do You “Paper Up” the Franchise Sale? (Legal)

Leslie Curran, Plave Koch

Explore FDD delivery methods, emphasizing signed receipt pages. Create efficient form emails for a two-step process. Delve into hold periods and best practices for gathering franchisee party details—owners, guarantors, valid entities, and signature authority. Examine franchisee legal entity options, including corporations, LLCs, and individuals. Share a legal compliance closing checklist, emphasizing scrutiny before franchisor signatures. Implement practices for managing draft and executed agreements, including PDF circulation, change monitoring, and signature verification. Develop comprehensive franchise administration checklists and data collection sources for signed agreements, tracking deadlines and expiration dates. Elevate your franchise operations with these streamlined practices.

3:00-3:50 PM: How To Produce & Facilitate a Success Virtual Discovery Day (Sales Process)

Greg Cook & Susan Stilwell, The Entrepreneur's Source

A virtual Discovery Day (or Meet the Team Day) is a reinforcement of the information the candidate has been gathering during your awards experience. It is also a time to “meet the team” and learn more about the people behind your proven system. Join the franchise development pros from The Entrepreneur's Source to learn the tips and best practices on creating an amazing virtual discovery day that leads to more awards.

3:00-3:50 PM: Setting Realistic Expectations: Beyond Marketing in Franchise Sales (Marketing)

Garrett Gillin & Jon Vogel, *Multiple*

This presentation will delve into the multifaceted nature of franchise sales, exploring elements that are often outside the control of marketing. Garrett Gillin and Jon Vogel will discuss the importance of a well-rounded approach that includes not just marketing but also sales processes, pricing strategies, and brand validation. Special attention will be given to the challenges faced by new brands, including the lack of reputation and validation, and the likelihood that the initial 6 to 12 months may focus more on quality over quantity.

3:55-4:45 PM: Chapters Of Change: Evolving Your FranDev Narrative At Each Crossroads

Zack Fishman, *Fishman PR*

Panel: Shane Evans, *Massage Heights*; Tim Courtney, *PuroClean*; Amy Lawhorne, *Ultra Pool Care Squad*

There isn't really a secret formula to what captivates a brands' first franchisees. For some, they never achieve it. For other emerging brands, maybe it's the founding story or the invention of a new franchisor category. If your brand is lucky enough to make it past "Chapter 1", there's always a lingering question: where do I go from here? In this session, our panel will highlight how they used the power of storytelling to keep the pages turning in their franchise growth stories.

3:55-4:45 PM: Closing the Deal. Taking Your Prospect Across the Finish Line (Sales Process)

Tipton Shonkwiler, *Accurate Franchising*

Looking for tried and proven steps for taking your franchise prospects through the sales process? "Closing The Deal , Taking Your Prospect Across The Finish Line", is designed to teach you the proper sales steps to control the sale, along with bringing you more consistency to your sales process to produce more sales production for your brand.

9:30 AM-12:00 PM: Mastermind Session 1

1:00-5:00 PM: Mastermind Session 2

5:30-7:30 PM: PARTY at BigShots

TUESDAY, FEBRUARY 6

7:30-8:00 AM: Breakfast

8:00-8:50 AM: Effective Legal Compliance to Enhance Value of the System for Future Transaction (Legal)

Amy Cheng, *Cheng Cohen*

Franchisors ensure compliance with applicable franchise laws mainly to avoid potential liability. However, having an organized and documented compliance system may also increase the value of your company. This session will discuss effective ways to comply with franchise laws while adding value to the company and creating streamlined processes to ensure compliance throughout the organization.

8:00-8:50 AM: Franchise Tech Stack: the What, the Why, the When, the How, the Where (Technology/Operations)

Madhav Supraneni & Monty Miller, Orchatect

Franchise tech stack refers to the integrated set of digital tools and technologies designed to streamline and enhance the operations of a franchise business. It encompasses a wide range of software and hardware solutions catering to various franchise management aspects, from inventory control and employee scheduling to customer relationship management and marketing. A well-designed franchise tech stack is a powerful tool for optimizing franchise operations, ensuring brand consistency, and staying competitive in the modern business landscape. Its adoption should be carefully planned and tailored to the franchise network's specific needs and growth stage.

8:55-9:45 AM: What You Don't Know You're Missing in the Sales Process (Sales Process)

Marcia Mead, M Squared Franchise Consulting

Uncover the secrets to optimizing your franchisee discovery process in our enlightening session, "What You Don't Know You're Missing in Your Potential Franchisee Discovery Process." Gain insights into overlooked elements hindering your ability to identify top franchisees. Explore psychological profiling, behavioral interviews, data-driven decision-making, and the importance of cultural fit. Designed for franchisors and development professionals, this session provides invaluable strategies for aligning potential franchisees with your brand's values. Learn to conduct effective interviews, leverage data analytics, and ensure cultural alignment for long-term success. Transform your franchise discovery process and elevate your brand with this essential session.

8:55-9:45 AM: How To Sell Your First 5 Franchises - Getting Your Franchise Development Started (Sales Process)

Chris Conner, FMS

The process of selling and executing your first five franchise agreements. How to manage franchise lead generation, franchise negotiations and establishing your credibility as a new Franchisor. Your perspective as a new franchise system needs to be different, you are a start up and you need to approach your early deals with this perspective. In this workshop, we will discuss the steps, sales model and how to navigate your first franchise deals effectively to position your brand for larger and faster growth.

9:50-10:40 AM: Franchise 2.0: The Power of Automation with Software Robots (Technology/Operations)

Jayesh Kasim, Valenta

Discover practical applications of AI, ChatGPT, and Generative AI in this session, addressing the common challenge businesses face in implementing these solutions. Explore the use of software robots in franchise development and various business functions. Learn how leveraging technology can delight franchise candidates, significantly increasing conversion rates while reducing administrative burdens. CEOs are increasingly adopting conversational AI for client engagement, with potential cost reductions of 15-70%. Explore how software bots can extend beyond franchise development to enhance finance, IT support, HR, and more. Prepare your franchise system for the future by harnessing data-driven insights with the help of software robots.

9:50-10:40 AM: 2024 Lead Generation Trends Every Franchise Development Professional Should Know (Marketing)

Kirk Allen, Reshift Media

Discover the latest trends and strategies shaping franchise development in this insightful session. Backed by data from over 200 franchise organizations, explore the impact of AI on franchisee lead generation, where prospects research online, and the evolving landscape of digital platforms for lead generation. Uncover the platforms with optimal cost-per-lead and trends in cost. Gain valuable insights into the strategies employed by top-performing franchise systems to find the best franchisees. Ideal for franchise development professionals, this session provides a forward-looking perspective on the market and the practices that set top-performing franchises apart.

10:40-10:50 AM: BREAK

10:50-11:50 AM: Roundtables

12:00-1:30 PM: WORKING LUNCH

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

Liane Caruso, Michael Hyam, Franchise Assembly

12:25-12:45: Keynote: It's the Candidate's Process Not Yours

Aaron Harper, Rolling Suds

A franchise sales process is necessary for scalability and keeping prospective buyers moving along through the buying process. However, each buyer has their own needs and desires and consumes information differently. With that in mind, the sales process needs to feel like it is the buyers process, and be flexible, instead of the age-old process that leaves buyers feeling like they are being jammed into a process that doesn't fit them. Learning this years ago transformed and absolutely skyrocketed my franchise sales allowing me to consistently sell over 100 units a year for the last 3 years in a row with multiple brands. In this discussion we're going to talk about how I do it.

12:45-1:30: Ask Me Anything Panel

Aaron Harper, Rolling Suds; Paul Pickett, Wild Birds Unlimited; Rob Lancit, Stratus Building Solutions; JT Thiessen, Home Franchise Concepts, Kim Falk, Beans & Brews; Jim DiRuggeris, Lightbridge Academy

This interactive session will give our attendees the unique opportunity to directly connect with seasoned fran dev professionals who have experienced every imaginable scenario. Combining hundreds of years of experience and a melting pot of industries these respected execs will share their expert advice, knowledge and ideas. This AMA panel promises a diverse range of perspectives so bring your burning questions and ask them ANYTHING!

1:30-1:40 PM: BREAK

1:40-2:30 PM: 5 Best Practices of Fran Dev Teams That Crush It (Leadership)

Dave Hansen, Client Tether

Ever wonder how a single consultant can close 72 territories by himself in a year, or how some FranDev teams 5X their franchise sales year over year without changing team size or marketing budgets? Join Dave Hansen in this session to learn the behaviors, processes, and channels you need to engage if you want to replicate their results and drive the franchise unit adoption you're hoping for.

1:40-2:30 PM: Harnessing AI to Maximize Fran Dev & Ops Efficiency (Technology/Operations)

Islam Tawfik, Franchisely; Ben Woodruff, WOOPS!

Stay ahead in Franchise Development by embracing the transformative power of Artificial Intelligence (AI). Tailored for professionals in Franchise Development & Operations, our session covers key areas:

1. *New Wave of AI Tooling: Explore the latest AI trends and technologies, discovering how it streamlines operations, enhances decision-making, and optimizes resource allocation.*
2. *Generic AI vs. Franchise-Tailored AI: Learn the crucial distinction and benefits of AI customized for Franchise Development, addressing unique challenges such as market analysis, location selection, and performance optimization.*
3. *Profitability Enhancement: Harness AI for data-driven decision-making, improved experiences, and increased operational efficiency. Gain actionable insights to drive growth. Elevate your franchise by unlocking AI's potential.*

2:35-3:25 PM: Stages of Growth: How to Navigate Through the Predictable Stages of Growth & Crises (Sales Process)

Rebecca Monet, Zorakle

Franchisors ensure compliance with applicable franchise laws mainly to avoid potential liability. However, having an organized and documented compliance system may also increase the value of your company. This session will discuss effective ways to comply with franchise laws while adding value to the company and creating streamlined processes to ensure compliance throughout the organization.

2:35-3:25 PM: 5 Easy Steps to Incorporate Company Culture into your Training Videos (Operations/Training)

Doug Mark, Learning Zen

In this fun and interactive workshop, you will learn how to articulate your core company values into your training materials. We aim to teach you new ways to do this by incorporating employee stories and testimonials, integrating your visual branding elements, and engaging franchisees and employees in the development of new materials. Together we will unearth new ways your training can radiate with your culture, mission, and vision.

3:30-4:25 PM: How To Attract More Franchisees with Proven (Advanced) Full Funnel Digital Marketing and Technology (Marketing)

John Lincoln, Ignite Visibility

In this session, you'll learn the most cutting-edge strategies in franchise development. Take an interactive journey through full-funnel digital marketing franchisee acquisition strategy. Walk away with customized systems, tools, the right ad networks, messaging, and a plan for 2024. Strategies based on real data, first-hand feedback, and true results.

3:30-4:25 PM: Grow Your System with a Strong Resale Program That Builds Long Term Value and Sustainability

Pete Baldine, Moran Family of Brands

As franchisors we want to grow our brands by awarding new franchises to strong candidates. We also want them to run successful, profitable businesses as franchisees. Another very important component in your franchise program should be to help franchisees exit when they are ready at a good value for the business they have built. In this session we will cover how to build a robust resale program covering all the key aspects that are critical in helping your franchisees exit successfully when they are ready. As a franchisor a robust resale program protects your interests in many different ways and is an important part of your growth and development.

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