

**Oh, S#it! I screwed up...**

***Can i fix it?***



<b>EMERGING</b>	<b>2</b>
<b>FRANCHISOR</b>	<b>0</b>
<b>CONFERENCE</b>	<b>2</b>
<b>NOVEMBER 2-4</b>	<b>2</b>

Nashville, TN



# Session Panelists

## David Blue

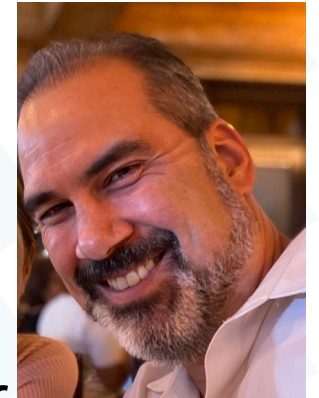
- Co-Founder, Blue Moon Estate Sales Franchise Systems
- Brand President, Homefront Brands



davidblue@bluemoonstatesales.com

## Bill DiPaola

- COO, Ballard Brands
- Brands include PJ's Coffee which its 100th location
- Former President & COO of Dat Dog Enterprises



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## Larry Oberly

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[larryoberly@gmail.com](mailto:larryoberly@gmail.com)

# Main Themes

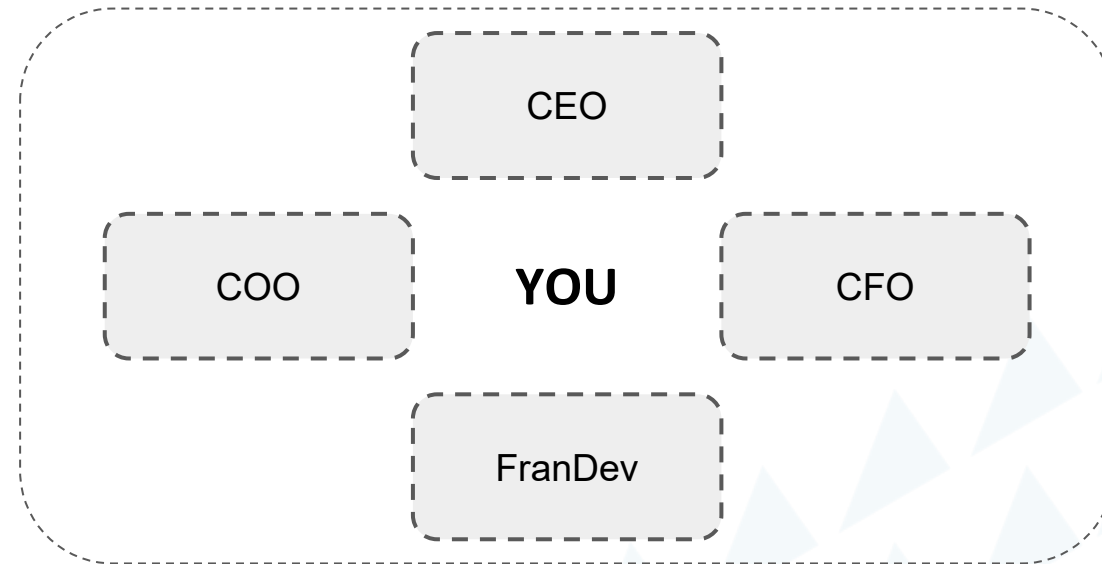
1. FDD & Franchise Development.
2. Support Team (Org structure & Team).
3. Marketing & Technology.
4. Ongoing Support, communication and keeping franchisees on track.



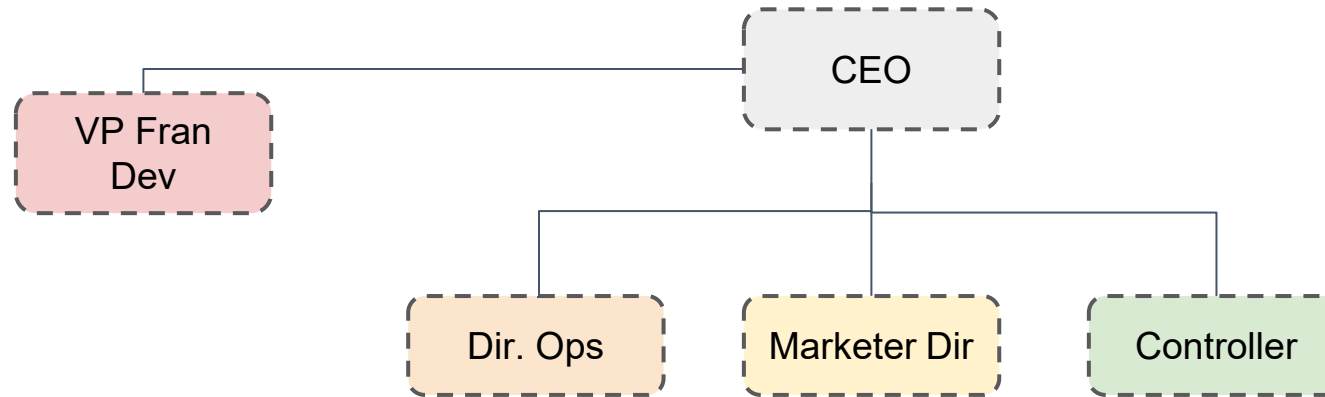
# Personnel and Organizational Charts



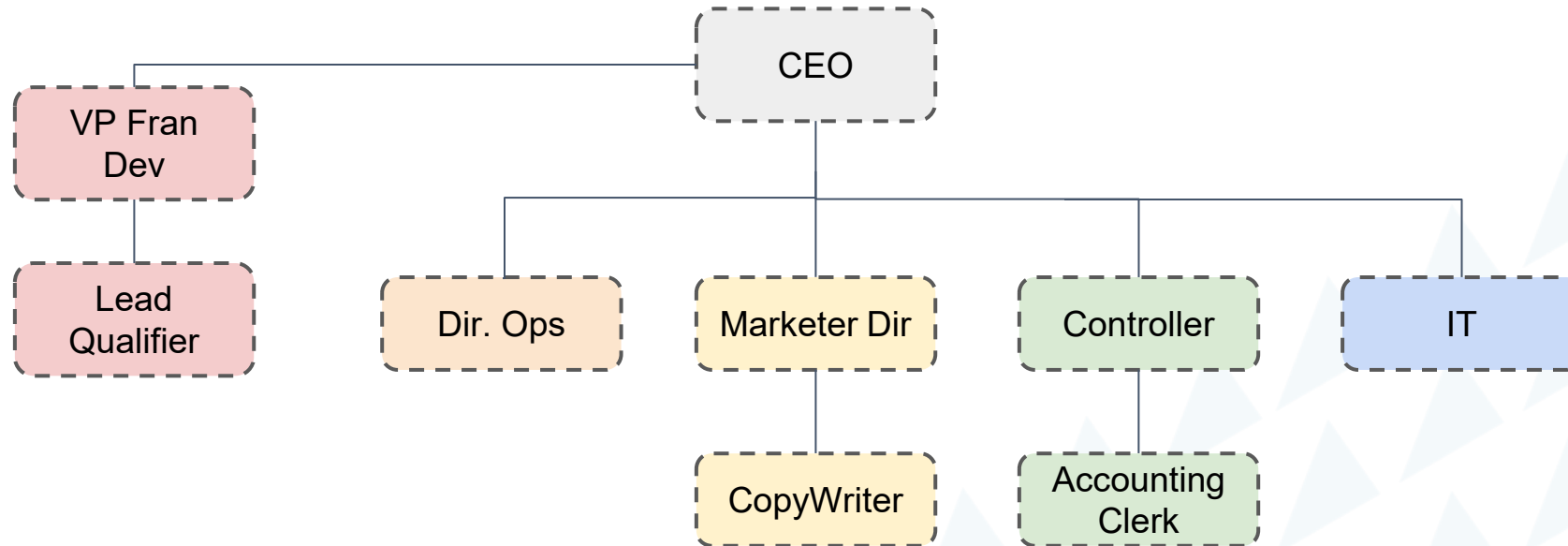
# Sample Organizational Chart- Start-Up



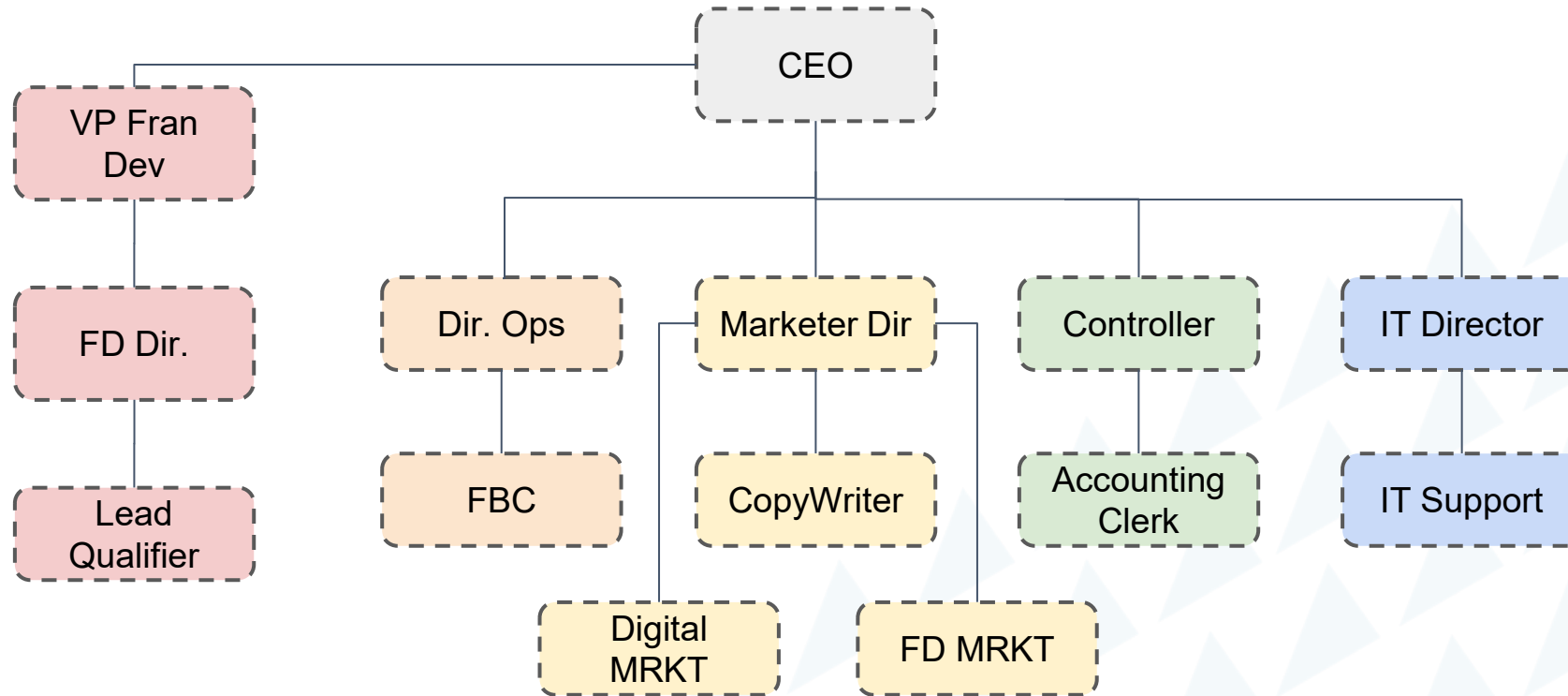
# Sample Organizational Charts- Step 1



# Sample Organizational Charts- Step 2



# Sample Organizational Charts- Step 3







# Marketing Fund & Local Store Marketing



# Marketing Planning

## Marketing Fund from Inception to \$500,000

Brand's start-up marketing by budget \$	\$50,000	+\$50,000	+\$100,000	+\$100,000	+\$100,000	+\$100,000
Cumulative Annualized Budget	\$50,000	\$100,000	\$200,000	\$300,000	\$400,000	\$500,000
Marketing Plan						
Consultant or Employee	C	C	E	E	E	E
Brand Assets						
URL's						
Website						
Social Media and Local Business Listings						
SEO						
Reputation Management						
Public Relations						
Online Lead Generation						

## Unit Marketing, Start-up to \$1M in Sales

Annual Sales	Percent of Sales	Monthly Invest	Step 1	Step 2	Step 3	Step 4
\$1,000,000	3.00%	\$2,500	PPC	Cold Calling	Direct Mail	Display Ads
\$900,000	3.25%	\$2,438	PPC	Cold Calling	Direct Mail	
\$800,000	3.50%	\$2,333	PPC	Cold Calling	Direct Mail	
\$700,000	3.75%	\$2,188	PPC	Cold Calling	Direct Mail	
\$600,000	4.00%	\$2,000	PPC	Cold Calling		
\$500,000	4.25%	\$1,771	PPC	Cold Calling		
\$400,000	4.50%	\$1,500	PPC	Cold Calling		
\$300,000	4.75%	\$1,188	PPC			
\$200,000	5.00%	\$833	PPC			
\$100,000	Start-up Marketing Plan/Spend					



# Onboarding using FranConnect



# Sample FranConnect New Sale Checklist



Item Name	Responsibility Area(s)	Schedule Start	Send Complete Reminder	Schedule Completion
<b>4 Weeks Prior</b>				
Update mapping software with territory & zip code	FranDev/Ops	30 Day Prior		15 Days Prior
FDD Disclosure sent and signed	FranDev	30 Day Prior		30 Days Prior
Name Approval	FranDev	30 Day Prior		15 Days Prior
Send territory proposal for approval	FranDev/Ops	31 Day Prior		16 Days Prior
Send FA Prep Sheet	FranDev	30 Day Prior		15 Days Prior
Create territory for location	FranDev	35 Day Prior		20 Days Prior
Discovery Day attendance	FranDev	30 Day Prior		30 Days Prior

# Sample FranConnect New Sale Checklist

Item Name	Responsibility Area(s)	Schedule Start	Send Complete Reminder	Schedule Completion
<b>Within a Week</b>				
Email HO team about new owner(s).	Operations	1 Day After		1 Day After
Create Hub & University Account(s)	Support	0 Day After	7 Days Prior	0 Day After
Send Sales Kit & Marketing Collateral	Operations	2 Days After		2 Days After
Obtain Studio ACH/banking information	Accounting	1 Day After	7 Days Prior	7 Days After
Send power requirements and example layout to franchisee	Operations	2 Days After		2 Days After
Set up Corebridge	Support	0 Day After	7 Days Prior	0 Day After
Add to Milestone reporting dashboard for website	marketing	2 Days After	2 Days Prior	2 Days After
Send credentials email to owner with account information	Support	1 Day After	7 Days Prior	1 Day After
Send Welcome/Marketing Kit	Operations	2 Days After		2 Days After

# Sample FranConnect New Sale Checklist

Item Name	Responsibility Area(s)	Schedule Start	Send Complete Reminder	Schedule Completion
<b>4 Weeks After</b>				
Business Training: Sales, Recruitment & Retention, & Leadership Culture	Hire/Train	30 Days After		90 Days After
Business Training: PP&A, CoreBridge, and Hub	Support	30 Days After		90 Days After
Business Training: Financial Management	Accounting	30 Days After		90 Days After
Business Training: Marketing	marketing	30 Days After		90 Days After
Have owner visit with local vendors in the area and get credit applications for next 30 days	Consultant	30 Days After		30 Days After
<b>6 Weeks After</b>				
Schedule In-Depth Marketing Call	marketing	45 Days After	7 Days Prior	45 Days After
Provide 6-week followup on customer sales training after Business Training	Hire/Train	45 Days After		45 Days After