SPECIAL SESSIONS

February 21-22, 2014

IFA Annual Convention
February 22-25
2014

New Orleans Convention Center
New Orleans, LA
Mission Statement

The mission of the Institute of Certified Franchise Executives (ICFE) is to enhance the professionalism of franchising by certifying the highest standards of quality training and education, and to be recognized as the premiere certification program in franchising.

Toward that end, ICFE’s Special Sessions program offers two days of robust pre-Convention educational seminars of the highest standards and professionalism.

PLEASE NOTE THAT REGISTRATION FOR THE ICFE SPECIAL SESSIONS IS NOT INCLUDED IN IFA CONVENTION REGISTRATION. THERE IS A SEPARATE AND ADDITIONAL REGISTRATION FEE FOR THE ICFE SPECIAL SESSIONS.

Registrants understand and consent that ICFE may record, edit and reproduce the courses, and use such recordings for educational, promotional and other purposes, all at its discretion.
Welcome to the 2014 ICFE Special Sessions!

Does it seem possible that another year has passed since our last convention? If you’re anything like me, the year did not “go” by….it flew by! How did I use the last 365 days? Did I spend time during the year to recharge my batteries? Did I create opportunities to learn and attend training so that I could be a better franchise executive? Well, this is our opportunity; this year’s ICFE Special Sessions are phenomenal - with many new and revamped courses. You owe it to yourself and you also owe it to your staff to take advantage of these courses.

This year at the 2014 IFA Annual Convention, the ICFE will present eight sessions over a two-day period (February 21-22). No matter if you are a new CFE candidate or a current CFE seeking credits for recertification there is a session for you!

In the past three years, more than 400 franchise executives have received their CFE, and nearly 1700 franchise executives are certified or currently working toward their certification. If you are not already enrolled in the Certified Franchise Executives™ (CFE) program, don’t wait another minute. Enroll today by using the application form, which is part of this booklet, or enroll online at our website—www.franchise.org/cfe.aspx. The ICFE Special Sessions and the CFE designation will advance you, your staff and your system – take 2014 by storm and be the best you can be!

Cynthia Gartman, CFE, CSA, NCG, TxCG
Chair, ICFE Board of Governors
President, IKOR USA, Inc. & IKOR, Inc.

The Entrepreneur’s Source is the proud educational sponsor of the Institute of Certified Franchise Executives.
Financial Boot Camp: Improving Network Unit Profitability and Performance

200 CFE EDUCATION CREDITS

Imagine leaving a one-day session with a complete set of practical, yet sophisticated, financial tools guaranteed to improve your network’s profitability and cash flow. On February 21st, that’s exactly what you’ll get when Steve LeFever and his colleague Rod Bristol present their extremely popular IFA session, Profit Mastery: Financial Bootcamp.

The extended economic doldrums have served to highlight the importance of Unit Profitability and Cash Flow as never before. This Profit Mastery program delivers key financial concepts and tools attendees can apply immediately in their own business – or in those of their franchisees. This is not ivory tower stuff; it’s hands-on finance that every owner and manager should know.

Profit Mastery turns standard financial statements into powerful financial intelligence, and you will find that the Financial Report Card – combined with the unique Financial Performance Road Map – to be unusually effective in pinpointing and quantifying the dollar impact of improved efficiency. Furthermore, the intriguing Cup Theory will point the way to use Break-even Analysis to manage the revenue/cost relationship – and prove to be an invaluable strategic tool in managing costs and, ultimately, profitability.

An added feature to the program this year will be an in-depth afternoon section on how to drive these Profit Mastery tools throughout an entire network, including implementation strategies, communication tools and franchisee motivation processes that are consistently proven to have dramatic impact on individual unit and network financial performance. You won’t want to miss it!

Clearly, improved performance translates directly into increased value – the end game. This program should be the financial foundation for every franchisor and franchisee.

Presenters:
Steve LeFever, MBA, CFE
Chairman & Founder, Profit Mastery

Rod Bristol, CFE
Vice President, Profit Mastery
IFA FRAN-GUARD™: IFA’s Franchise Sales Management and Compliance Program

300 CFE EDUCATION CREDITS

IFA FRAN-GUARD™ is IFA’s Franchise Sales Management and Compliance program. Through this program, we demonstrate the business case for compliance and how a culture of compliance will help you and your staff build a vibrant company while assisting you to protect your system and avoid costly mistakes. This session is especially designed for senior executives to show how you can take proactive steps to reduce risks, manage growth, and build a stronger, healthier franchise system.

Moderator & Panelist
(The Business Case for Compliance):
Cynthia Gartman, CFE
President, IKOR® USA Incorporated

Keynoters & Panelists
(Building A Culture of Compliance):
Mark Johnson, CFE
CEO, Granite Transformations

Additional Panelists:
Legal Compliance & Compliance Implementation
Rick Morey, CFE
Partner, DLA Piper US LLP
Ann Hurwitz, CFE
Partner, Baker Botts LLP
Principles of Franchise Management

200 CFE EDUCATION CREDITS

This intensive one-day course will provide an overview of key issues faced by franchise executives in managing franchise operations. Using real-life scenarios, and hypothetical formats, the course will present a series of problems that are faced by franchise executives every day. Executives will learn about the serious problems franchisors typically face, how others are solving them, and how to make good decisions concerning difficult issues.

The subjects dealt with will be the tough ones that arise, for example, when selling franchises, qualifying prospects, managing the advertising fund, changing the contract, approving and disapproving transfers, terminating, and facing a threatened lawsuit. High-level franchise executives will join the session to provide practical insights and enhance the discussions. And, so that you can learn from your fellow franchise executives, there will be extensive registrant involvement throughout the session.

Presenters:
Kathryn Boe Morgan, CFE
IFA-EF Special Advisor

Bret Lowell, CFE
Partner, DLA Piper US LLP

Joe Bourdow, CFE
Senior Advisor, Valpak

Barry Heller, CFE
Partner, DLA Piper US LLP

Mark Liston, CFE
President, Glass Doctor

Nikki Sells, CFE
Principal, Sells Development, Inc.
Leading With Excellence in Franchising

200 CFE EDUCATION CREDITS

This special CFE course is designed for C-level executives in franchising and limited to 40 participants. The focus will be on leadership in a franchise environment through a dynamic and engaging series of sessions that will educate, engage and stimulate participants. The sessions will cover:

- Strategic Planning – The Unique Aspects in a Franchise Environment
- Cultivating Talent & Organizational Structure – Two Key Ingredients for Success
- Executing with Excellence – Flawless Operations for Dynamic Global Markets
- Brand Performance and Growth – Elevating Your Brand to Facilitate Growth

Participants will be provided with current research relevant to leadership in franchising, peer development through case study analysis and strategic thinking with executive roundtable discussions. This is a unique opportunity to evaluate your organization and its leadership position in franchising in an intensive peer-learning environment. Space is limited and you must be a senior manager in a franchise organization to register.

Presenters:
Michael Isakson, CFE
IFA Past Chairman
Partner, Insight Execution

Dr. Ben Litalien, CFE
Director, Georgetown University Franchise Management Certificate Program
Principal of Franchise Well, LLC

Luncheon Speaker:
Catherine Monson, CFE
CEO, FASTSIGNS International, Inc
Ignite Brand Growth by Integrating Social Media into Your Overall Marketing Strategy

200 CFE EDUCATION CREDITS

By now, you’ve probably attended many different workshops on social media and digital marketing at franchise conferences, but have come away with the same basic information and no tangible best practices or ideas. This re-invented ICFE Special Session will teach you through impactful franchisor case studies how integrating social media into your overall marketing strategy can drive explosive brand growth through consumer acquisition and franchisee recruitment.

Most franchisees are operators and are able to devote very little time to marketing activities. However, the number of marketing channels that franchisors and franchisees have to manage has grown significantly over the years from digital media channels including Yelp, Facebook, Twitter, SEO, PPC to traditional advertising, email marketing and CRM management.

Over the course of the day, attendees will hear actual case studies from industry leaders on ways social media has been successfully applied to building awareness and sales, as well as attract qualified leads for franchise sales. The case studies will also share how roles and responsibilities should be defined for the franchisor, franchisee and agency partner. Session content will be beyond the basics of social media 101, including how franchisees can be engaged in the process and real examples how this growing medium has proven to grow your business. Session attendees will also work together and apply the learnings throughout the day to address and present solutions to two business scenarios.

**Moderator**
Lorne Fisher, CFE  
CEO/Managing Partner, Fish Consulting

**Panelists:**
Todd Leiser, CFE  
Director, Franchise Sales  
Valpak

Jon Carlston, CFE  
Vice President of Social Development  
Process Peak LLC

Mark Kirsch, CFE  
Partner  
Gray Plant Mooty

Amit Pamecha, CFE  
CEO & Co-Founder  
FranConnect
Leading v. Managing

200 CFE EDUCATION CREDITS

A successful manager manages things; however, a successful leader leads people. At the end of the session, the participant will learn what tasks he or she may need to delegate and which skills are needed to properly motivate and lead their team.

- Identify the difference between leadership and management
- 10 skills to master to be an effective leader
- 9 characteristics of top sales leaders
- Manage things, lead people
- People don’t care how much you know until you show how much you care
- Leadership affirmations and attitudes
- 10 skills you need to master as a leader
- Are you a boss or a leader?

Closing for Champions – This module provides specific instruction and examples of proven closing techniques. The student will learn when to close and when not to close, how to create a “buying atmosphere” and powerful closing techniques that get results quickly.

- The 12 characteristics of top closers
- Signals when it’s time to close and when not to close
- 20 basic closing strategies
- Closing with passion

Turn It Up a Notch – add excitement and enthusiasm to your life and career – Covers why and how to add excitement and enthusiasm and then zero in on doing this in 3 main areas (Attitude, Alignment – Balanced Lifestyle, and Accountability) Each participant will be guided through an exercise called “Ideal Wheel” in which participants will be given a system where they can actually keep score and monitor their growth in the 7 critical areas of their life. In addition, each participants will be led through putting together a very powerful 60 day game plan to absolutely “Turn It Up A Notch” in their Life and their Career.

- 3 key reason why
- 5 strategies how to add excitement and enthusiasm to you life
- Excitement and Enthusiasm in balancing your life
- Excitement and Enthusiasm in goal setting
- Excitement and Enthusiasm with your attitude

Presenter
Gary Michels
Co-Founder, Southwestern Consulting
IFAFRAN-GUARD™: IFA’s Franchise Sales Management and Compliance Program

300 CFE EDUCATION CREDITS

IFAFRAN-GUARD™ is IFA’s Franchise Sales Management and Compliance program. Through this program, we demonstrate the business case for compliance and how a culture of compliance will help you and your staff build a vibrant company while assisting you to protect your system and avoid costly mistakes. This session is especially designed for senior executives to show how you can take proactive steps to reduce risks, manage growth, and build a stronger, healthier franchise system.

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Partner, DLA Piper US LLP

Ann Hurwitz, CFE
Partner, Baker Botts LLP
Moving from Conflict to Collaboration in a Franchise System

200 CFE EDUCATION CREDITS

This session is designed to educate franchise executives on thought-provoking strategies for identifying and managing conflicts that arise in the franchise relationship. Participants will learn techniques and best practices to navigate negotiations while creating a collaborative environment for the long-term success of all the stakeholders in the franchise system. Course takeaways include:

- Understanding how to differentiate between the 3 C’s in franchise relationships and disputes: common interests, complementary interests and conflicting interests
- Creating a stakeholder map that identifies the interests and concerns of all parties (franchisees, franchisor, vendors, brand customers)
- Identifying one’s personal negotiating style to understand how natural tendencies can influence outcomes
- Detecting everyday situations that could potentially end up in dispute
- Acquiring communication best practices that could potentially keep a franchise dispute from escalating
- Developing strategies and tactics in today’s competitive environment for:
  - Recognizing emotions
  - Building rapport
  - Managing expectations
  - Inventing solutions
  - Gaining consensus
  - Repairing trust

Attendees will participate in facilitated problem-solving exercises, role plays and group discussions. These “real-world” best practices can be used immediately to make a difference in the franchisee-franchisor relationship and improve the franchisors and franchisees bottom lines.

Presenters:
Denise Cumberland PhD
Assistant Professor - University of Louisville
Organizational Leadership & Learning/College of Education and Human Development

Brian Schnell, CFE
Partner, Faegre Baker Daniels LLP

Traci Tufts, CFE
Director of Learning Performance, American Poolplayers Association
About the Certified Franchise Executives Program

1. Where is the CFE Website?
The CFE section of the IFA website can be reached directly at www.franchise.org/cfe.aspx.

2. How do I log in to see my CFE credits?
Go to www.franchise.org/cfe.aspx. Click on “My CFE”. Your username is your email address as it appears in the IFA membership records. Your password is your individual IFA ID number. If you change your email or password and do not notify us you won’t be able to log in until we make the changes to your record.

3. Where are the online courses?
The CFE online courses are located at www.ifa-university.com and video-on-demand programs can be found at https://ifa.bizvision.com.

4. I can’t log in to my online courses—why do I get a message that my username/password are wrong?
Your username/password for the IFA website will not work on the IFA University site. When you register for the first time at IFA University, you will be prompted to create a unique username and password that you should save for later access to the site.

5. How do I get credits for online courses?
You may submit the request online or email directly to Rose DuPont (rdupont@franchise.org). In either case, you must print out and fax or email the certificate you receive when you successfully complete the course.

6. When must I complete my CFE credits in order to graduate?
Graduation takes place once a year at IFA’s Annual Convention. In order to be eligible to graduate, candidates must complete all the required credits by November 20th of the preceding year.

7. How long do I have to complete the program?
Candidates have three years from enrollment to complete the certification program. If you do not finish within that time period, you may re-enroll (additional fee applies) once more for another 3 years with no forfeiture of credits earned to date.

8. Where can I find information about course offerings?
The current CFE Calendar is available at www.franchise.org/cfe.aspx. You can also check the Events section of the IFA website. The calendar is updated regularly as new courses are approved for CFE credits.

9. Can you explain the types and difference in CFE credits?
There are three types of CFE credits: Experience (500 maximum can be credited); Participation (500 maximum can be credited); Education (minimum of 2500 needed).

10. What do I need to do to recertify once I have received my CFE?
Recertification applications must be filed no later than February 1st every three years. Information on the process is available at www.franchise.org/cfe.aspx - “Recertification”.
ICFE Certification Requirements

A minimum of 3500 credits is required to qualify for the Certified Franchise Executive (CFE) designation. Granting of the CFE designation to qualified candidates is determined by the ICFE Board of Governors. CFE candidates earn credits that are applied toward certification. These credits are earned in the following three areas:

**1. EXPERIENCE**
(500 credits maximum)

This area allows credit for past experience gained through work or training experiences in the area of franchising. CFE candidates will earn 100 credits (to a maximum of 500) for each year of work experience in franchising. CFE candidates may earn a maximum of 500 credits for experience in career/work experiences as a franchisor, franchisee, or other franchising professional experience.

**2. PARTICIPATION**
(500 credits maximum)

This area will provide practical experience gained from participation in events conducted by the International Franchise Association (IFA). CFE candidates must attend at least one IFA approved event each year. CFE candidates may earn a maximum of 500 credits:
- Membership in IFA or membership in other national franchise association recognized by the World Franchise Council (WFC) (100 credits per year)
- IFA Annual Convention (100 credits)
- IFA Public Affairs Conference (100 credits)
- IFA Franchise Business Network (50 credits per meeting)
- Women in Franchise Network (50 credits per meeting)
- International Franchise Expos (IFE) (50 credits per event)
- Other programs as designated
- IFA Webinars (50 credits per event)

**3. EDUCATION**
(2500 credits minimum)

Education credits are earned by taking ICFE approved courses or sessions that cover fundamental skills and knowledge considered essential for a franchise executive. These topics include:
- Diversity
- Economics, Accounting or Financing
- Franchisee Recruitment and Training
- Franchisor/Franchisee Relations
- Franchise Law Regulations
- Human Resource Management
- Management & Operations
- Marketing
- Social Media

In addition candidates may earn credits in ICFE approved courses or sessions in special interest areas such as:
- Franchising Concepts
- Franchise Conventions
- Franchising Trends
- Insurance
- International Franchising
- Public Relations/Communications
- Real Estate and site selection
- Resource Management
- Technology
- Other interest areas

All Candidates who enroll in the Certified Franchise Executives program must successfully complete the CFE Study Guide Exam (online) as part of their requirements to receive their CFE designation.
The CFE program provides a forum that supports continued professional development and adherence to the highest standards in franchising. It is also a wonderful way to form valuable relationships and generate new ideas from different perspectives.

The Institute for Certified Franchise Executives (ICFE) offers a wide range of continuing education programs for professional development culminating in the Certified Franchise Executive™ (CFE) designation. Our mission is to enhance the professionalism of franchising by certifying the highest standards of quality training and education.

For more information about getting your CFE, contact Rose DuPont at 202-628-8000 or visit franchise.org/cfe

“I am a CFE because... I am committed to excellence in franchising through on-going learning!”

Rosemarie Hartnett, CFE
President
Abrakadoodle

“I am a CFE because... You can always learn more, be better.”

Mark Johnson, CFE
EVP & CEO, Granite Transformations

What Others Are Saying...
“At Safeguard, our #1 priority is to provide businesses with the right solutions to get and keep customers. That not only applies to the end customer but especially to our franchisees. Today, all of our franchisee support managers and development staff are either CFE certified or working toward earning their CFE, which means they are well prepared to provide the best guidance, solutions and growth strategies to every one of Safeguard’s independent distributors and prospects.

As Safeguard drives this exciting period of record-breaking growth and success, the knowledge we have gained through the CFE program allows us to offer existing and new franchisees the latest business strategies and the best in service and support. Thank you, ICFE, for making us the best at what we do!”
APPLICATION FEE: $350 IFA Member $600 Non-member
Application fee as of 1/1/2014: $650 Non-member

Application and Personal Data Statement, please print or type all information.

Name ___________________________ Title ___________________________

Company _________________________ Address ________________________

City ____________________________ State ___________ Zip ______________

Telephone (___) ______ Fax (___) ______ Email Address __________________

Position/Activity ______________ Committee __________________________

Dates: From ______________ To ______________ Total Years __________

Education. List educational institutions attended beyond high school.

Institution __________________________ Degree __________________ Dates __________

Institution __________________________ Degree __________________ Dates __________

Special Achievements. List any special achievements such as: awards, publications, IFA presentations, or special achievements you have received:

________________________________________________________________________

INTERNATIONAL FRANCHISE ASSOCIATION EDUCATIONAL FOUNDATION/INTERNATIONAL FRANCHISE ASSOCIATION ACTIVITY

List your involvement with the IFA or the IFA-EF:

Position/Activity __________________ Committee __________________________

Dates: From ______________ To ______________ Total Years __________

Position/Activity __________________ Committee __________________________

Dates: From ______________ To ______________ Total Years __________

Franchising Experience. (500 credits maximum; 100 credits per year for work experience in franchising field.) (Attach additional page if necessary.)

Company __________________________ Position ________________________

Dates: ______________ Total Years __________

Company __________________________ Position ________________________

Dates: ______________ Total Years __________

Participation. (500 credits maximum; candidates must attend at least one IFA approved event each year.) (Attach additional page if necessary.)

Course/Date ______________

________________________________________________________________________

ICFE Credited Programs Attended (2,500 credits). List ICFE approved courses in these areas: Diversity, Economics, Accounting or Financing, Franchisee Recruitment and Training, Franchisor/ Franchisee Relations; Franchise Law Regulations; Human Resource Management; Management & Operations; Marketing; Dual Concepts in Franchising, Franchise Conventions; Franchising Trends; Insurance; International Franchising; Public Relations/Communications; Real Estate & Site Selection; Resource Management; Technology; other interest areas. Courses must have been taken within one year of application for enrollment to be considered. (Attach additional page if necessary.)

Course/Date ______________

________________________________________________________________________

I certify that the information contained in this Application & Personal Data Statement for the Institute of Certified Franchise Executives (ICFE) is true and correct in all material respects. I understand that the purpose of this document is to enroll me in the Institute of Certified Franchise Executives and provide relevant information for evaluation to determine credits toward certification to which my educational and franchising experience and achievements may entitle me. I understand that filing this document does not entitle me to the CFE designation and that I must complete the prescribed curriculum of the ICFE educational program, including any prescribed and/or written examinations, in order to become eligible for certification. Hereby further certify that I adhere to the Code of Ethics of the International Franchise Association.

Signature __________________________ Date ______________

Payment

VISA MasterCard American Express Name ________________________

Card Number ________________________ Exp. Date ___________ Signature ______________________

Card Billing Address __________________________

For information on the CFE scholarship program, please contact Rose DuPont. Mail or fax to:
INSTITUTE OF CERTIFIED FRANCHISE EXECUTIVES 1501 K Street, NW, Suite 350 Washington, D.C. 20005-1412 Telephone: 202/628-8000 Fax: 202/628-0812 Email: rdupont@franchise.org • www.franchise.org/cfe.aspx
Registration for the ICFE Special Sessions is not included in your IFA Convention registration. There is a separate and additional registration fee for the ICFE Special Sessions. REGISTRATION FOR ALL SESSIONS IS ON FIRST COME-FIRST SERVED BASIS.

Registrants understand and consent that ICFE may record, edit and reproduce the courses, and use such recordings for educational, promotional and other purposes, all at its discretion NOTE: A test will be distributed at the conclusion of each Special Session which must be completed and submitted by attendees to the course presenter. CFE credits will only be granted to those who submit and pass the test. No exceptions will be made.

Name __________________________________________________________________ Title___________________________________________________________
Company _____________________________________________________________________________________________________________________________
Address _______________________________________________________________________________________________________________________________
City ___________________________________________________________________ State ______________ Zip ________________________________________
Telephone _______________________________Fax __________________________ Email Address __________________________________________________

CFE CREDITS
IFA FRAN-GUARD™ program: 300 CFE education credits . All other programs: 200 CFE education credits

REGISTRATION FEES
IFA Member: $550.00 per session, Non-Member: $800.00 per session. Registration includes: Program, program material, lunch & breaks.
☐ Check here if you require special assistance to fully participate.
☐ Please register me for the following ICFE Special Session(s).
Name (for badge): __________________________________________________________________________________________________________________

FULL DAY: FRIDAY, FEBRUARY 21, 2014 Select only ONE session on each day.
☐ Financial Boot Camp: Improving Network Unit Profitability and Performance $550 $800
☐ IFA FRAN-GUARD™: IFA’s Franchise Sales Management & Compliance Program $550 $800
☐ Leading with Excellence in Franchising (C-Level Executives ONLY–limited to 40) – NEW $550 $800
☐ Principles of Franchise Management $550 $800

FULL DAY: SATURDAY, FEBRUARY 22, 2014 Select only ONE session on each day.
☐ IFA FRAN-GUARD™: IFA’s Franchise Sales Management & Compliance Program $550 $800
☐ Leading v. Managing – NEW $550 $800
☐ Moving from Conflict to Collaboration in a Franchise System – NEW $550 $800
☐ Ignite Brand Growth by Integrating Social Media into Your Overall Marketing Strategy $550 $800

TOTAL REGISTRATION FEE: $___________   $___________

PAYMENT
I want to pay by: ☐ Check  Please make checks payable to: Institute of Certified Franchise Executives (Federal Tax #01-062-7992)
Credit Card:  ☐ VISA ☐ MasterCard ☐ American Express

Name _______________________________________________________________________________________________________________________________
Card Number _______________________________ Exp. Date ____________ Signature________________________________________________
Card Billing Address ____________________________________________________________________________________________________________________

Please mail or fax to: INSTITUTE OF CERTIFIED FRANCHISE EXECUTIVES, Attn: Rose DuPont, 1501 K Street, NW, Suite 350 Washington, D.C. 20005-1412. Telephone: 202/628-8000 • Fax: 202/628-0812 • Email: rdupont@franchise.org • www.franchise.org/cfe.aspx

CANCELLATION POLICY:
Full refunds for cancellations received in writing by December 6, 2013. Cancelations received after that date subject to a 50% penalty. No refunds after January 2, 2014. Substitutions permitted.