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 2017 ICFE Special Sessions!

With every IFA Annual Convention, there is an opportunity to begin, advance or complete CFE requirements during the ICFE Special Sessions. This year, we are offering 10 full day sessions designed to enhance your understanding of franchising and to provide you the tools needed for franchising success.

Becoming a Certified Franchise Executive is an important step in your franchise career. Knowledge is POWER and the course requirements necessary to complete your CFE provide you with POWERFUL knowledge. As you look toward future goals for your franchise organization’s success, now is the time to consider how you can best help yourself, your staff, and your franchisees not only meet those goals, but to exceed them.

In 2016, we awarded 167 franchise executives their CFE certificates. Clearly, becoming a CFE prepares you for whatever comes your way in your franchising career. This year our Board of Governors has committed to the development of more courses tailored to franchisees as well as more online courses—both of which will facilitate even more CFEs being awarded and make our franchising industry stronger because of our shared franchise knowledge.

The IFA Annual Convention offers the best educational franchise opportunity of the year. Shouldn’t you consider how your organization’s participation in this event can also help meet your system-wide plans for success? You owe it to yourself, your staff and your franchisees to make sure that they take advantage of the courses being offered at the 2017 IFA Annual Convention in Las Vegas.

No matter if you are a new CFE candidate or a current CFE seeking credits for recertification, there is a session for you! Join the over 2000 CFE candidates 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.

Join the CFE movement. Become “franchise strong”! Your decision will make a difference in your career, your business and your system. See you in Las Vegas!

Gail W. Johnson, CFE
Chair, Institute of Certified Franchise Executives
Founder and Chairman, Rainbow Station, Inc.
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
Cynthia Gartman, CFE, CSA, NCG, Tx
Publisher
Seniors Blue Book Franchising

Panelists
Rick Morey, CFE
Partner, DLA Piper LLP (US)

Ann Hurwitz, CFE
Partner, Baker & McKenzie

“We sell almost 900 franchises a year in North America. We wanted to ensure everyone inside our organization had the best possible grounding in franchise education, not just our recruitment and sales staff. We made it mandatory for everyone in the company to complete FRAN-GUARD™.”

- Tony Valle, CollegePro
Profit Mastery: Financial Boot Camp Part I – Improving Network Unit Profitability and Performance

If you are registering for this special session, we strongly encourage you to consider completing the profit mastery experience by registering for Profit Mastery: Charting a Course for the Future, which will be presented on Sunday, January 29th.

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 January 28th, that’s exactly what you’ll get when Steve LeFever and his colleague Rod Bristol present their extremely popular IFA session, Profit Mastery: Financial Boot Camp. This case-study driven program provides unique tools and a process you’ll be able to implement immediately in your network.

The extended volatile economy 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 a 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. As always, the presentation will be supported by Steve and Rod’s unparalleled style incorporating information (60%), motivation (20%), and humor (20%). The day will fly by and you’ll leave with the tools and a clear road map to drive unit profitability in your network.

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

Rod Bristol, CFE
Vice President, Profit Mastery
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 FranchiseWell, LLC

Guest Speakers:
Catherine Monson, CFE
CEO
FASTSIGNS International

Tabbassum Mumtaz
President & Owner
Apex Restaurant Management, Inc.
Leading Through Powerful 21st Century Communications

200 CFE EDUCATION CREDITS

Systematic and effective methods must be in place for leaders to communicate in a way that motivates their staff, franchisees, and employees to want to change, be energized and take action. Whether it is a system wide change in policy, a re-direct of strategy or a new and controversial marketing program, the skills to shift knowledge, behavior and attitudes are a requirement for any leader in today’s competitive, social and easily distracted world.

In this session, be prepared to embrace the paradigm of “Connect”; to your message, yourself and your audience. This is the secret sauce to consistently create buy in and move people to action.

As a result of this work session you will be able to:

1. Understand and execute on the paradigm of “Connect”
2. Shift knowledge, skills and attitudes in-person and virtually successfully
3. Develop powerful messages methodically and consistently
4. Use visuals that support the message, not overwhelm the message
5. Master the six elements of delivery for a great first and ongoing impression
6. Use nervousness to your advantage

Presenters:
Kory Kogon
Global Productivity Practice Leader
FranklinCovey
Understanding and Managing Potential Joint Liability on Franchise Operations

200 CFE EDUCATION CREDITS

The NLRB’s General Counsel’s proposed changes to the joint employer standard have potentially sweeping implications for all involved in franchising. Additional areas of potential joint liability will be discussed including vicarious liability, supply chain liability, and cyber liability. This interactive session will update participants on what is occurring with these important issues, identify potential issues with the proposed employment standards, and provide participants with tools to mitigate exposure from joint liability.

Presenters:
Ritchie Taylor, CFE  
Shareholder,  
Manning, Fulton and Skinner, P.A.

Bob McDevitt, CFE  
Senior Vice President, Franchising  
Golden Corral Buffet & Grill

Lee Barnes  
President  
Family Fare, LLC
IFA Fran-Guard™: IFA’s Franchise Sales Management and Compliance Program

300 CFE EDUCATION CREDITS

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**Moderator**
Cynthia Gartman, CFE, CSA, NCG, Tx
Publisher
Seniors Blue Book Franchising

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“We sell almost 900 franchises a year in North America. We wanted to ensure everyone inside our organization had the best possible grounding in franchise education, not just our recruitment and sales staff. We made it mandatory for everyone in the company to complete FRAN-GUARD™.”

- Tony Valle, CollegePro
Profit Mastery: Charting a Course for the Future Part II

200 CFE EDUCATION CREDITS

(It is not mandatory to take Part I Profit Mastery: Financial Boot Camp in order to register for this Part II session, but taking both is extremely powerful.)

Great news! This program focuses on identifying and managing the key cash flow drivers in a company, with a practical, plain-English application of two powerful tools: cash flow analysis and financial gap analysis (balance sheet management). Wearing a “how-to” advisory hat, we will introduce you to a step-by-step process to build a profit plan and cash budget and underscore how you can squeeze as much cash as possible from the balance sheet.

Using our familiar case-study approach, we’ll show you how to develop a realistic cash flow projection and really understand the impact of seasonal patterns. Additionally, we’ll focus in depth on the difference between “profits” and “cash flow” – explaining in plain English the biggest myth in business finance: “If we have profits, why don’t we have any money?” Next, we’ll unlock the balance sheet secrets to long-term cash flow using a unique tool we call “Financial Gap” – absolutely the best and most powerful tool to come out of the financial industry in 20+ years.

We’ll identify the only four sources available to capitalize and fund growth and you’ll see clearly see why most business owners underestimate the need for capital. This will be the most strategic tool to take back to your franchisees.

We’ll finish up with two invaluable shorter segments: (1) how to put together a winning plan for the bank and (2) how to utilize the Profit Mastery tools to develop a culture of accountability and performance among your franchisees.

It’s not enough for you to understand and use these tools; your franchisees are the ones that stand to benefit the most. Help them become better business owners!

Finally, we’ll accomplish all the above utilizing our famous recipe of 60% information, 20% motivation and 20% humor. The day will fly by and you’ll have powerful, practical tools to drive enhanced unit profitability and cash flow in your network.

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

Rod Bristol, CFE
Vice President, Profit Mastery
FranTogether

200 CFE EDUCATION CREDITS
FranTogether shows franchisors and franchisees how to build resilient, sustainable businesses through effective collaboration.

You will learn from some of franchising’s leading lights and get access to the latest evidence-based research on how to establish healthy franchise relationships. You will also engage in meaningful discussions and breakout groups focusing on “best in class” practices for creating profitable partnerships with strong unit level economics.

FranTogether is about franchise leadership. While embracing the importance of solid operations, marketing and technology, it also goes beyond these into the field of franchising psychology, culture and the drivers of franchisee satisfaction.

Key Course Takeaways:
1. How to build high levels of trust and commitment (essential ingredients) in the franchise relationship.
2. How to address differences of opinion creatively when (not if) these arise, and move from conflict to collaboration.
3. Tools and processes for improving communication at the personal and organizational level.
4. How to address the stress of innovation and change so franchisees remain profitable and franchise networks remain relevant to their customers.
5. How to constructively address real world challenges that play out in franchise systems every day.
6. Leave inspired with improved skills and confidence to apply your learning and “move the needle” in creating positive franchise relationships.

Brian Schnell, CFE
Partner
Faegre Baker Daniels LLP

Dina Dwyer-Owens, CFE
Co-Chair
The Dwyer Group

Greg Nathan, CFE
Founder Franchise Relationships Institute

Tamra Kennedy
Franchisee Owner
Taco John’s Twin City TJ’s, Inc.

Steve Hockett
President
Great Clips, Inc.
Create a Culture of Extraordinary Productivity

200 CFE EDUCATION CREDITS

21st-century knowledge workers and leaders are paid to think, plan, communicate, and execute with excellence. Franchise executives know this better than most. And, trying to do these vitally important things and grow revenue is even more difficult in the midst of overwhelming demands, distractions, crises, and more. It can be hard work to represent the brand effectively, develop leads, build long-term winning strategies, foster key relationships, and improve systems.

In this session, be prepared to learn the measurable processes to consistently make high value decisions; focus attention in the midst of unprecedented distractions; and create the energy required to execute with excellence.

As a result of this work session, you will be able to:

1. Act on the important rather than react to the urgent
   - Learn to consistently “Pause, Clarify and Decide” to increase your Return on the Moment (ROM)
2. Go for extraordinary results on the things that matter most.
   - Create a framework of what success looks like in your current most important roles in life today.
3. Deliberately allocate your attention to priorities and activities that move the needle to success
   - Regain control of your work and life through a cadence of planning and execution.
4. Control your technology
   - Optimizing gadgets and technology platforms like Microsoft Outlook and Google.
5. Nourish your “fire” rather than become burned out
   - Benefit from the latest in brain science to consistently recharge your mental and physical energy.

Presenters:
Suzette Blakemore, CFE
Managing Director
FranklinCovey

Kory Kogon
Global Productivity Practice Leader
FranklinCovey
Principles Of Franchising

200 CFE EDUCATION CREDITS

This one-day course will provide an introduction to some of the key problems faced by management of franchisors, along with the “principles” used to help solve those problems.

Using a hypothetical franchisor, and a series of unique and entertaining skits, the course will take you through the life cycle of a franchisor – from the early stage to the mature years. Along the way, you will learn from high-level presenters about the problems that real-life franchisors actually encounter. The problems presented will be the tough ones that often arise when selling franchises, qualifying prospects, managing the advertising fund, changing the system, approving and disapproving transfers, terminating for default, dealing with a franchisee association, and facing a threatened lawsuit. Come learn – through the trials and tribulations of this franchisor – how it can go terribly wrong! And – from the presenters and your fellow attendees – how to do it right! Share your experiences, and help us navigate through a series of all-too-real franchise dilemmas. If you have not yet encountered these knotty situations, you certainly will in the future!

Presenters:

Kathryn Boe Morgan, CFE
IFA-FERF Special Advisor

Bret Lowell, CFE
Partner, DLA Piper LLP (US)

Joe Bourdow, CFE
Senior Advisor, Valpak

Barry Heller, CFE
Partner, DLA Piper LLP (US)

Mark Liston, CFE
President, Glass Doctor
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.

2. How do I log in to see my CFE credits?
Go to www.franchise.org/cfe. 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?
There are several online training portals for CFE courses. Check the most current CFE calendar for details. The CFE calendar can be found at www.franchise.org/cfe and is updated on a regular basis.

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 Franchise University site. When you register for the first time at Franchise University, you will be prompted to create a unique username and password that you should save for later access to the site.

5. I can’t log in to my online courses—why do I get a message that my username/password are wrong?
Every online training portal is independent and separate. When you first decide to take a course at one of the online training sites, you must register as a new user and create a unique username and password to access the site going forward. You need to save the login information for later access to the site.

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. 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. Where can I find information about course offerings?
The current CFE Calendar is available at www.franchise.org/cfe and is updated on a regular basis. You can also check the “Events” section of the IFA website – www.franchise.org. You should also watch for the monthly “CFE Enews” electronic newsletter sent to all members on a monthly basis.
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 Franchise Action Network Annual Meeting (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 (e.g. WednesdayWise, etc.) (50 credits per event)
   - IFA Legal Symposium

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
The Institute for Certified Franchise Executives (ICFE) offers a wide range of continuing education programs for professional development culminating in the Certified Franchise Executives (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 www.franchise.org/cfe.
“I am a CFE because leadership requires continual growth. In today’s world, the only sustainable competitive advantage a company has is the speed at which the business learns. That’s why we have CFE graduates and students throughout all of our companies.”

“The CFE program serves as a foundation on which the leaders in our companies can grow. There is no need to reinvent the wheel in franchising – the principles and best practices of franchising are available to all companies and leaders through the CFE program.”

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