



IFA26 evolve.



iFA INTERNATIONAL
FRANCHISE
ASSOCIATION

From First Touch to Final Handshake: Case Studies and Workshops in Franchise Development

- Our Agenda
- Workshops
- Co-Create a Franchise Development “playbook”
- Thanks to our session sponsor, Neighborly



Your Presenters



Marci Kleinsasser, CFE

Moderator

Vice President, Marketing
Franchise Development

Home Franchise Concepts

marci.kleinsasser@gohfc.com



SCAN ME



Amanda House, CFE

Presenter

Director of Digital & Franchise
Marketing

Lightbridge Academy

AHouse@lightbridgeacademy.com



SCAN ME



Tony Nicholson

Presenter

Vice President of
Franchise Development

Scenthound

Tony@scenthound.com



SCAN ME



Jennifer Durham

Presenter

Sr. Vice President,
Franchising and Development

Potbelly Sandwich Works

jennifer.durham@potbelly.com



SCAN ME



**Pulse Poll: What
is your biggest
challenge in
Franchise
Development
today?**



Case Study #1:

From First Click to Qualified Candidate:
Fixing the Franchise Development Funnel



“
What if your biggest franchise sales problem isn't sales at all?”

The Challenge: The Top-of-Funnel Breakdown

- Strong brand awareness \neq strong lead quality
- Rising lead volume, **declining efficiency**
- Sales team spending time disqualifying instead of selling

Bottom Line:

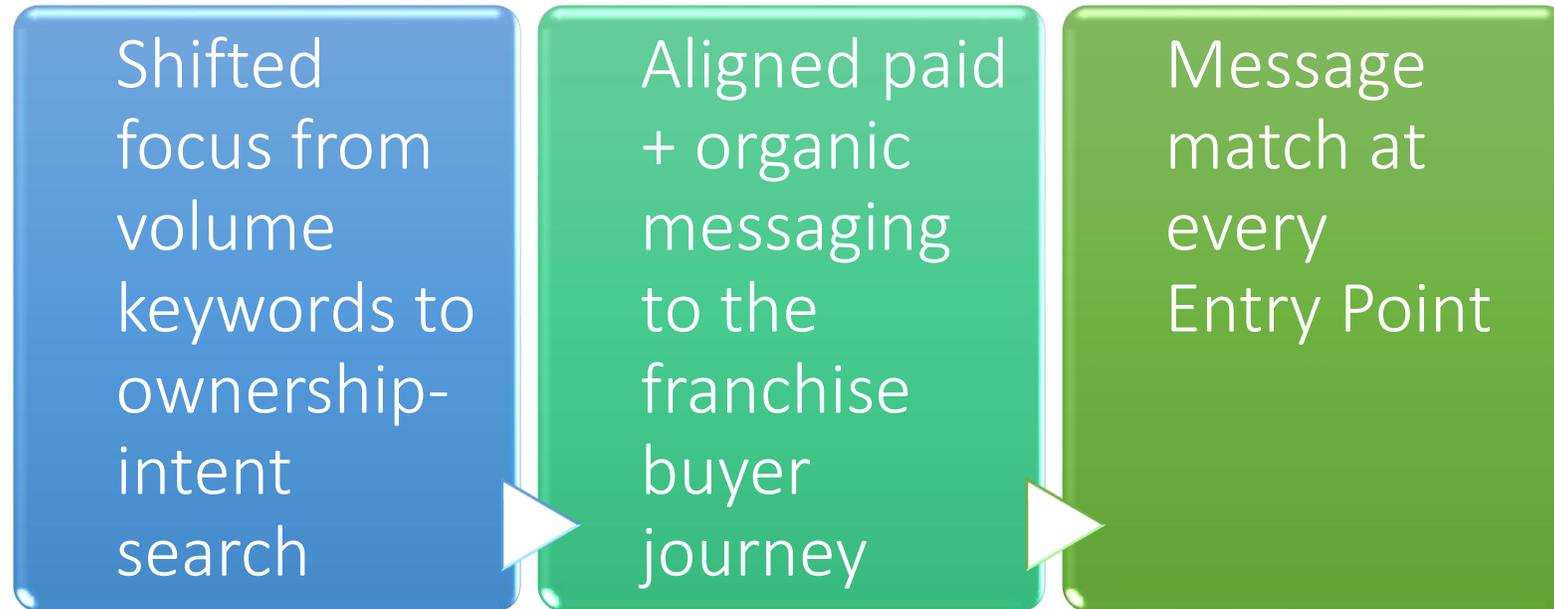
- High Interest and Low Intent



Compounded by a more cautious franchise investment environment in 2025.

The Solution: Reengineering the Funnel—Starting at First Touch

We didn't chase more leads. We redesigned how the *right* leads entered.



The Solution: Qualification Before Sales Ever Engaged

What Made This Different

- Marketing-owned **pre-qualification standards**
- Clear MQL definition shared with sales
- Built friction *on purpose* at the top

- Smarter inquiry forms (not longer—*intentional*)
- Educational content that pre-answers hard questions
- Clear “who this is for / not for” language



Marketing filters. Sales validates.

The Results: Fewer Leads. Better Outcomes.

2024: Volume Driven Year

- 86% Lead Increase from 2023
- 23% Increase in Agreements
- Broad Demand, Lower Filtering
- Avg 3-4% Progression through the Funnel

2025: Intent Driven Year

- 19% Lead Decrease from 2024
- 13% Decrease in Agreements (stabilized)*
- Higher Intent in a Tighter Market
- Avg 7-8% Progression through the Funnel*

Key Takeaway and Next Steps:

In volatile markets, funnel design becomes a growth strategy.

What to Do Next:

- Audit intent and where qualification really begins
- Align messaging to your buyer journey
- Identify where sales is compensating for funnel gaps
- Build friction on purpose
- Design your funnel to do the hard work earlier

If sales is filtering too much, your funnel isn't working hard enough.



Workshop #1 – First Touch to Qualified Candidate

-  If demand dropped by 20% tomorrow, which part of your funnel would break first?
-  Which leads frustrate your sales team the most—and why are they getting through?

Case Study #2:

Analyzing and Enhancing Your Sales Process



The Challenge:

- Ineffective sales process
- Candidates were falling out of the funnel at a high rate
- Potential investors were stuck in the pipeline for ~9.5 months
- Full recruiting potential (candidates) was not being met
- Fran dev goals were not accomplished



Pre Solution work:

- Before a solution can be implemented, some analysis is needed
 - People, process & systems
- Where are candidates falling out of the funnel
 - Why are they falling out of the funnel
 - Why are they staying in the funnel for a longer time frame
 - What's the conversion %

Some of the Findings:

- Candidates weren't being contacted fast enough
- We didn't have a great reputation (industry & brokers)
- We were playing at a "JV" level

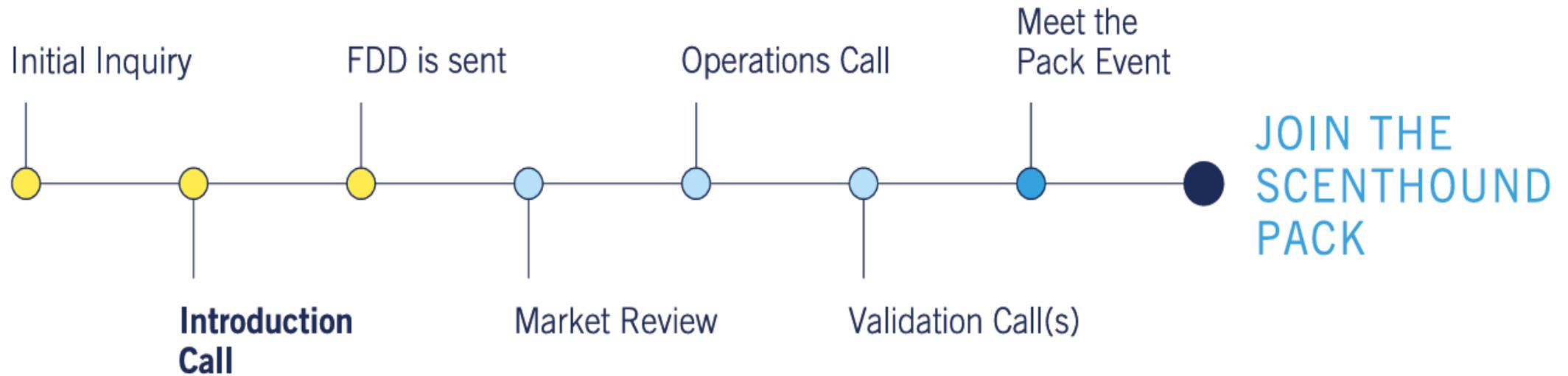


The Solution:

- Hired some varsity players
- Re-launched with all of the broker networks
- Began attending industry & broker events
- Rolled out re-vamped sales process
 - Sample on next slide



Discovery Process Timeline



The Results:

- We took sales from ~30 (units) a year, to over 130 a year
- Much higher close/conversion rate: 83% (start – MTP)
- We condensed the sales process from 9.5 months, to ~43 days
- We started landing larger, multi-unit deals, with more sophisticated buyers
- We started to get our brand's "MOJO" back



Key Takeaway and Next Steps:

- Start with a realistic baseline
- Dovetail into some in-depth analysis
- Fix the problem
- If you can't fix the problem, partner with someone who can



Workshop #2 – Optimize your Sales Process to improve conversions



Where are candidates getting stuck or falling out of your funnel?



What changes could you make to your sales process to improve successful conversions?

Stand Up • Stretch • Knowledge Check

(5 Minutes)

1 Funnel Design

What principle defined the funnel redesign?

- A) More leads
- B) Less friction
- C) Built friction on purpose ←
- D) Sales speed qualification

How It Works:

➤ Stand up and pair with someone you don't know well

➤ You'll answer 4 rapid-fire questions

2 Ownership

Who owned pre-qualification in the improved funnel?

- A) Sales
- B) Brokers
- C) Ops
- D) Marketing (shared MQL standards) ←

3 Sales Velocity

How much was the sales cycle reduced?

- A) 6 months
- B) 90 days
- C) 9.5 months → ~43 days ←
- D) No change

4 Before the Fix

What framework guided the analysis?

- A) Brand/Budget/Brokers
- B) Marketing/Sales/Ops
- C) People / Process / Systems ←
- D) Speed/Scale/Spend

Case Study #3:

The Close – Final Handshake



Evolving from Cold Virtual
Close to Warm Welcome

The Challenge:



Pandemic necessity and decentralized support team created dependence on virtual close



Potbelly's culture of Good Vibes & strong support hard to convey without connection to the leadership & support team



Bespoke sales process customized for each candidate lacks comradery with other candidates & team



Candidate approval is anti-climatic and creates a heavy lift for sales team



Long cycle times on completed deals

The Solution:

01

Explore all options & assess what fits

- Leverage existing franchise owners
- Find franchisors willing to share

02

Keep what's great

- In shop experience
- Candidate Business Plan review
- Evidence of strong leadership, operation & marketing support

03

Ditch what isn't

- Isolated, one on one virtual meetings that lack connection
- Allowing candidates to drive

04

Develop an experience that drives consistency, shorter cycle times and a clear call to action for candidates



The Results:

Some Ideas

Once a week, month, quarter

Dinner or breakfast to create confidence & candidate connections

Guided Site visits

Presenters are important – Senior Leadership & Direct

Reimburse for travel if they sign

Deposit towards agreement (refundable or non)

Financial & operational approval before attendance

Franchise Business Review

Most Discovery Days were in person pre-Covid, then they went virtual out of necessity. We are curious what is happening today & would love for you to weigh in:

How are you running discovery days today?

You can see how people vote. [Learn more](#)



91 votes • Poll closed

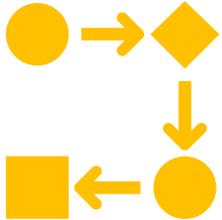
Key Takeaway and Next Steps:



Assess what's right for your brand and customize the experience



Ask candidates what they loved and where you can do better



Evolve! You're allowed to get better



Workshop #3 – Improve the Close with effective Discovery Days (or whatever you call it 😊)

What is your current close ratio on Discovery Day?

What gaps occur most often after Discovery Day?



What feedback are you receiving from candidates on the Discovery Day experience?

Panel Q&A

- ❑ What's one lesson you wish you had known earlier in your franchise development journey?
- ❑ What's one common myth about franchise development you'd like to bust?
- ❑ What is one specific, immediate action every person in this room should take tomorrow to move their franchise goals forward?



Thank you!



Marci Kleinsasser, CFE

Moderator

Vice President, Marketing
Franchise Development

Home Franchise Concepts

marci.kleinsasser@gohfc.com



SCAN ME



Amanda House, CFE

Presenter

Director of Digital & Franchise
Marketing

Lightbridge Academy

AHouse@lightbridgeacademy.com



SCAN ME



Tony Nicholson

Presenter

Vice President of
Franchise Development

Scenthound

Tony@scenthound.com



SCAN ME



Jennifer Durham

Presenter

Sr. Vice President,
Franchising and Development

Potbelly Sandwich Works

jennifer.durham@potbelly.com



SCAN ME



Breakout Bonanza
Scan the code at the End of a Tuesday PM Breakout Session
to Earn 2 Points!



Scan code in your event app



Unable to scan?
Enter code: TUEPMB

