



IFA26 evolve.



iFA INTERNATIONAL
FRANCHISE
ASSOCIATION

The Franchise Development Strategic Growth Workshop

Why



James Stapleton
Vice President of
Franchise Development
Caring Transitions

Who



Bobby Kelly
Vice President of
Franchise Development
Home Helpers

How



Erica Tarnowski
Director of Franchise
Development
Aroma Joe's Coffee

Where



Andy Peat
Chief Brand &
Product Officer
Snap Fitness



James Stapleton, CFE

Vice President of Franchise Development



• Senior Relocation • Downsizing • Estate Sales •

jestapleton@caringtransitions.com

www.caringtransitionsfranchise.com

What do YOU want?



Why do we have memories?



Your emotions control
EVERYTHING!



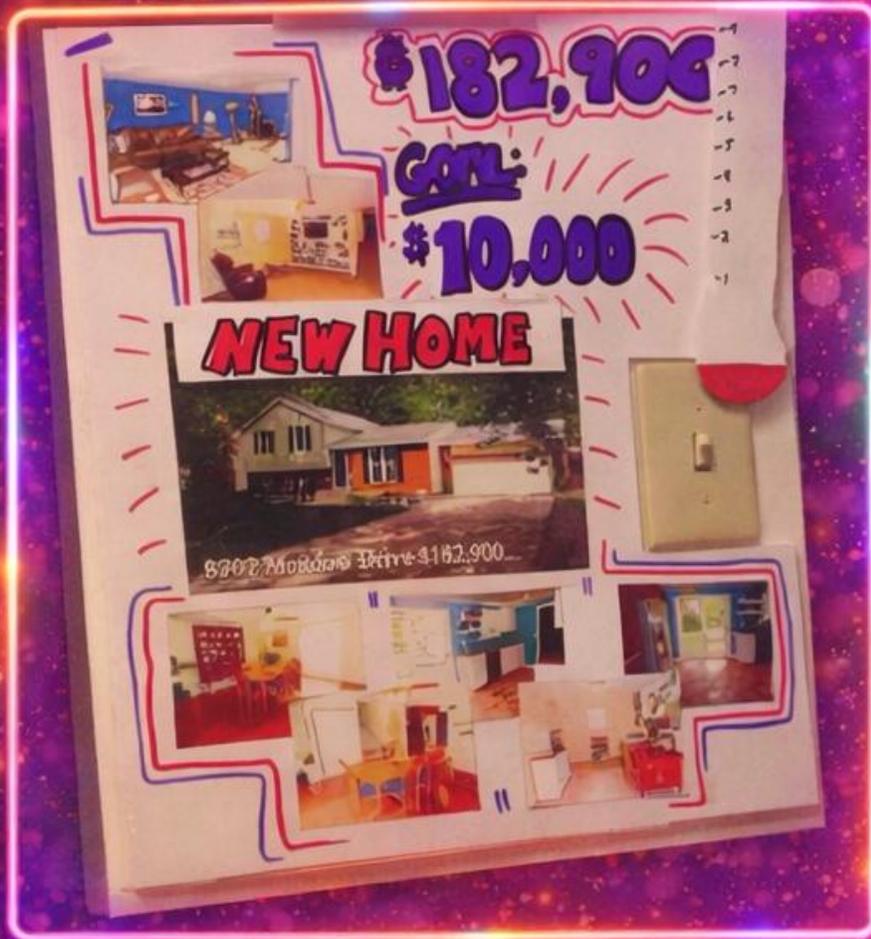


Define or Drive



**“The goal doesn’t change
because of the circumstances
around you.”**





James Stapleton



December 12, 2014

The vision board is up!! Shit just got real! The goal is by June to be in this house. Come on [Krissy](#), we got this!!



in 000s Local Currency
Ranking
 (weighting above metric)

Region Area

US West	North California
US East	Great Lakes
US East	Tennessee, Alabama, Mississippi



in 000s Local Currency
Ranking
 (weighting above metric)

Previous		
Rank	Rank	Δ
1	63	62
2	17	15
3	45	42



in 000s Local Currency
Ranking
 (weighting above metric)

of
Centers

2
5
1

Region Area

Canada	Eastern Canada
US East	Florida South
US East	Florida South
Canada	Central Canada



in 000s Local Currency
Ranking
 (weighting above metric)

Previous		
Rank	Rank	Δ
1	2	1
2	4	2
3	71	68
4	9	5
5	3	-2
6	7	1
7	100	93
8	27	19
9	51	42
10	15	5



in 000s Local Currency
Ranking
 (weighting above metric)

of
Centers

5
2
1
1
1
1
4
5
2

Region Area

Cluster

Area Manager

of
Centers

Rank Previous Rank Δ

Region	Area	Cluster	Area Manager	# of Centers	Rank	Previous Rank	Δ
Canada	Central Canada	ON, Toronto	Benjamin Hughes	5	1	2	1
Canada	Central Canada	ON, Toronto	Lisa Henderson	5	2	19	17
US East	New Jersey	NJ, Hoboken / Jersey City / Newark / Fort Lee	Melissa Viggiano	1	3	18	15
US East	Carolinas	SC, Greenville	Nora Baker	2	4	5	1
US East	Midwest	OH, Cincinnati / Dayton	James Stapleton	4	5	9	4
Canada	Central Canada	ON, Toronto	David Essig	4	6	11	5
US East	Florida South	FL, West Palm Beach	Jennifer Cleveland	2	7	6	-1
US East	Carolinas	NC, Raleigh	Eric Aponte	5	8	17	9
US West	New Mexico, Utah, Idaho, Montana	MT, Bozeman	Gerald Burton	1	9	7	-2
US East	New Jersey	NJ, Hoboken / Jersey City / Newark / Fort Lee	Eric Taylor	3	10	29	19







I AM...





Bobby Kelley, CFE

Vice President of Franchise Development

HomeHelpers[®] Home Care

Bkelley@homehelpershomecare.com

HomeHelpersFranchise.com

FRANCHISE DEVELOPMENT

Leads

Candidate

Brand

2 T's

2 F's

ICP

WHO?





MOST BRANDS OBSESS

OVER HOW THEY GENERATE LEADS & WHERE THEY FIND CANDIDATES.

**VERY FEW RIGOROUSLY DEFINE WHO THEY
ARE ACTUALLY BUILT TO WIN WITH—**

AND WHO IS TRUSTED TO SELL THEIR STORY.

**THAT MISALIGNMENT IS THE
SILENT KILLER OF GROWTH.**

There are only two types of leads—and both are the best you'll ever work with. Once you realize this, your results will change.

1. The “Help Me Know More Lead”



2. The “Tell You To Screw Off Lead”



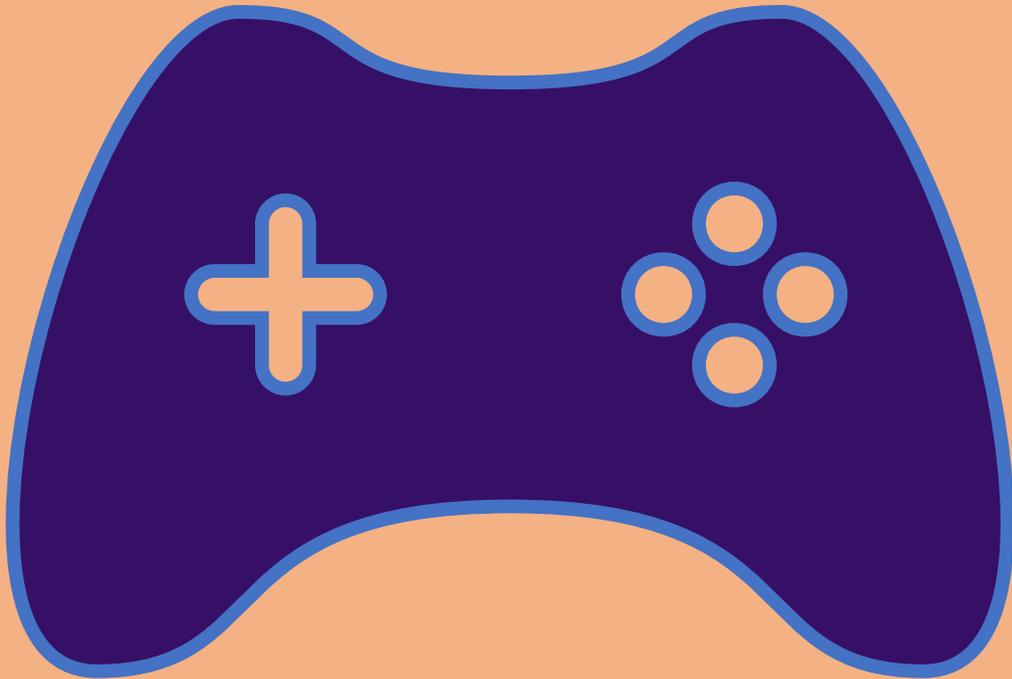
If You Haven't Noticed...

The Game Has Changed.....

- Average candidate completes 27 hours of personal research before fully engaging with a brand- up from 20 hours in previous years.
- Average time from first call to signing a franchise agreement is 12 weeks-down from 19.6 weeks in previous years.

Our Candidates Now:

- **arrive informed**
- **arrive opinionated**
- **arrive with comparisons**
- **arrive with expectations**
- **are no longer “discovering” franchising.**
- **are validating decisions they’ve already started forming.**



Whoever Makes it Easy.....Wins...

"Fran Dev today isn't about creating interest....it's about keeping pace with it."

Typical franchise sales process has 6-8 steps, mine has 4. Combine steps to surface all the-must knows early in process.

Validation starts as soon as possible. No longer does it have to happen in 2 weeks, 2 months, or after we have had 72 zoom meetings together.

Quit selling year 5 results....talk their reality day 5...get them fired up about being at \$0. It's the only number you can't go backwards from, and it's the most inevitable milestone in business...they will be there the second they open the doors.

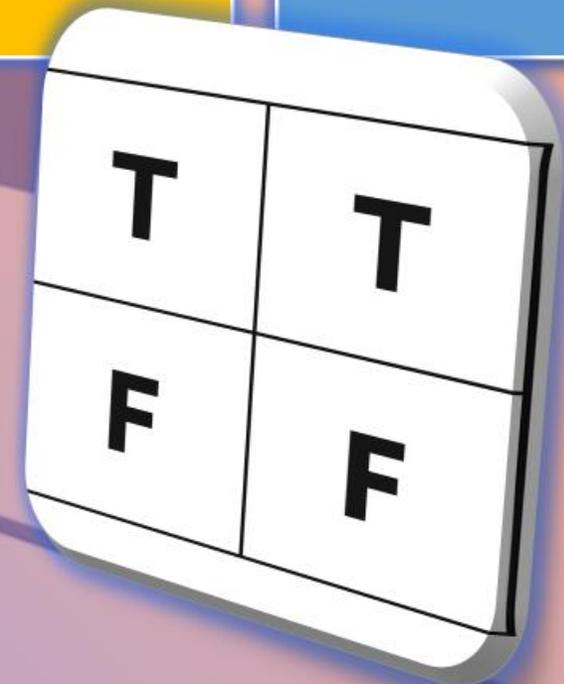
Facts are Facts & Figures are Figures, don't sell them- deliver them.

Territory

Timing

Finance

Fit





IFA26
evolve.



IFA

"You Down With ICP....Yea You Know Me"

Manage to your brands deal Candidate Profile.....no exceptions.

Ideal shouldn't be defined by:

- Liquid capital
- Net worth
- Credit score

***These are qualifiers....not predictors.**

Ideal Candidate Predictors:

- Decision velocity
- Coachability
- Risk tolerance alignment
- Operating intensity
- Purpose alignment with business model

***Capital gets them in the door...behaviors determine if they will drive growth.**



Brands Driving Strategic Growth Will Always:

Speak to brand identity, more than they do earnings.

Work with candidates who are behaviorally aligned, not just financially qualified

Protect their brand as fiercely as they grow it.

Be unapologetic about "fit".

Be experts at who should not buy their franchise.



ERICA TARNOWSKI

Franchise Development Director

Aroma Joe's[®]

etarnowski@aromajoes.com

franchising.aromajoes.com

HOW TO IMPLEMENT THE STRATEGIC GROWTH PLAN FOR YOUR BRAND



THIS SECTION WILL COVER

1. Franchise Development: Expectations vs. Reality
2. Goals and Objectives
3. Metrics and Benchmarking
4. Identifying Qualitative Drivers



EXPECTATIONS

What our leaders
and coworkers
think we do...



EXPECTATIONS

What our candidates think we'll let them do...



Expectations

What we think we do...



VS. REALITY

What we **actually** do...



LEGAL

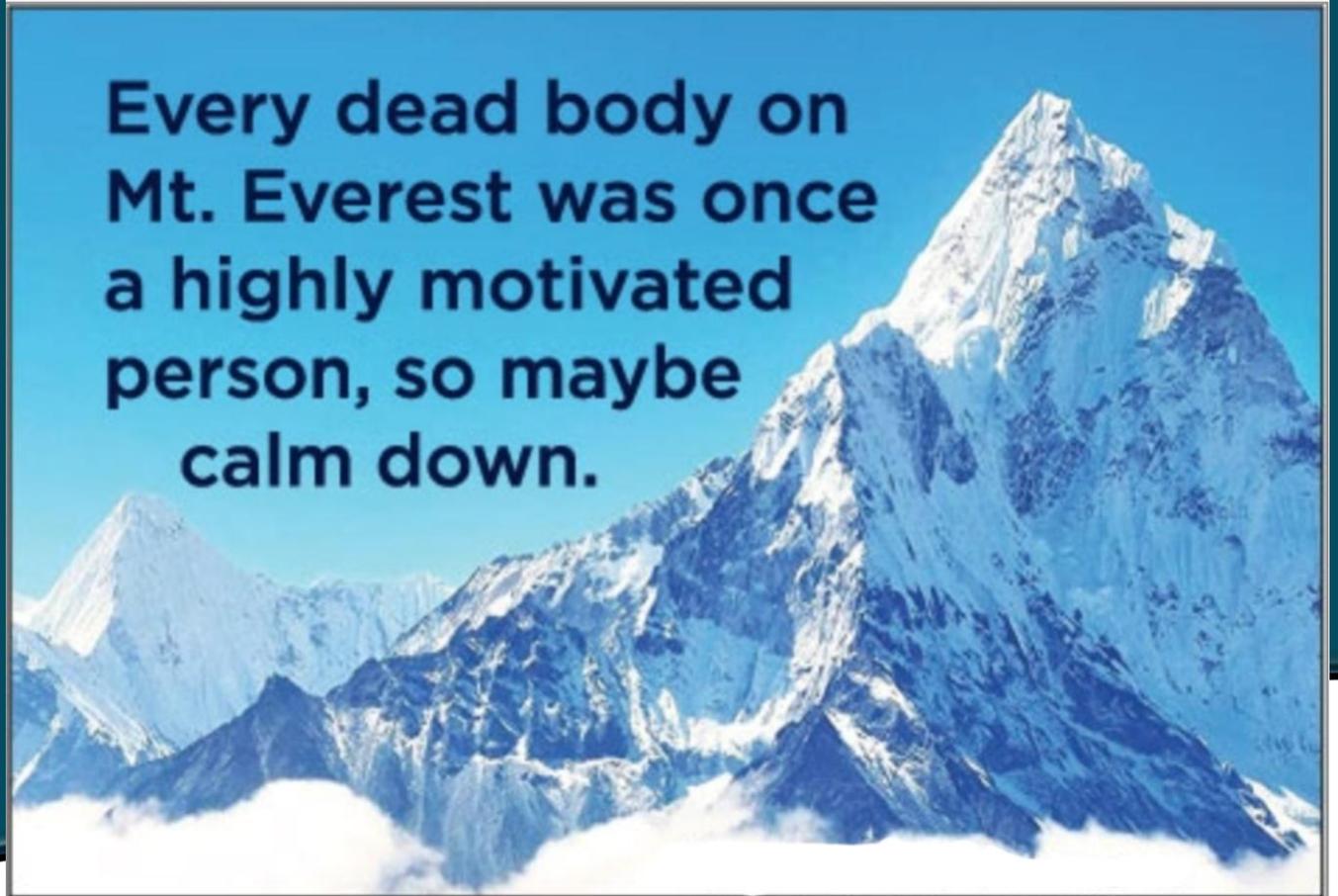
OPS

SETTING THE EXPECTATIONS

Mt. Everest Average
Summit Success Rate
 $\cong 55-60\%^*$

Average Lead to Deal
Ratio in Franchising
 $\cong 1-2\%^*$

Every dead body on
Mt. Everest was once
a highly motivated
person, so maybe
calm down.



GOALS AND OBJECTIVES

- Identify and seek to understand the short-term and long-term goals of the brand or organization
- Recognize how your role and the franchise development department is best suited to support the organizational objectives
- Align and communicate with key stakeholders on the viability of the goals based on KPIs and scalability drivers



WORKING BACKWARD

10-YEAR PLAN: 500 Units Open & Operating

2025 YEAR END UNIT COUNT: 100

GOAL: Open 400 New Units by Year End 2035



KEY METRICS AND BENCHMARKING

1. How many units or territories have we opened or launched over the past 2-3 years?
2. How many new units or territories are in the current development pipeline?
3. How long does it take a franchisee, on average, to open a new unit or territory after signing a franchise agreement?
4. How many do we *need* to open annually?



BENCHMARKING AND KEY METRICS

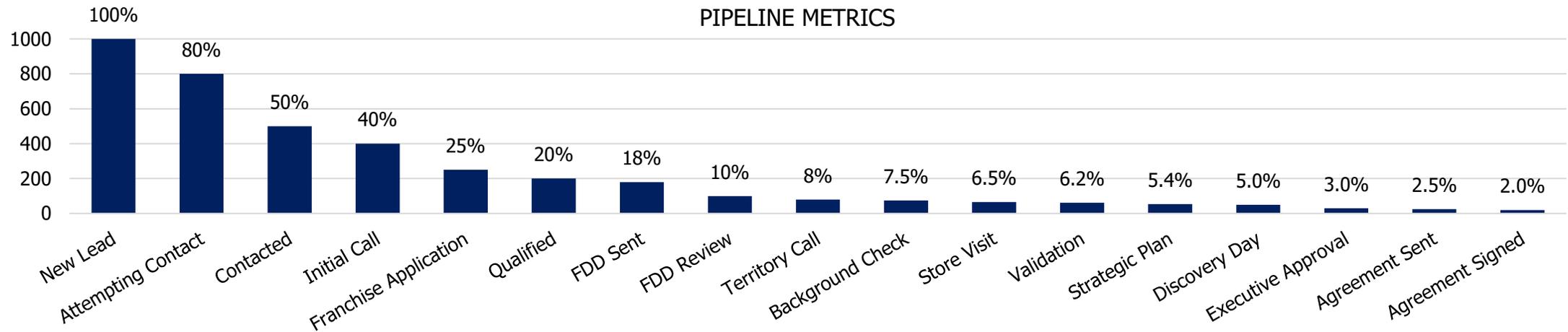
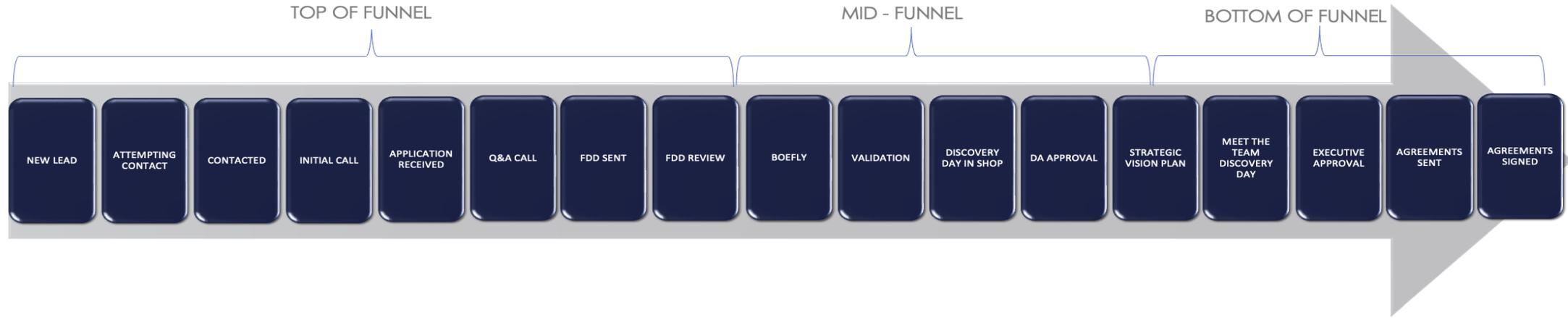
Benchmarking

1. Internal
2. Industry
3. Competitive

Key Sales Pipeline Metrics

1. Deals / CPD
2. Discovery Day Attendees
3. Qualified Candidates
4. Leads / CPL
5. Time from Lead to Deal

KEY METRICS AND BENCHMARKING



IDENTIFYING QUALITATIVE DRIVERS

1. Surface the intangibles – factors working for or against us that typically can't be quantified, but are likely to impact results
 - i. Within our control
 - ii. Outside our control
2. What are some of the qualitative drivers impacting your brand or industry today that may affect the success of your strategic growth plan? Can you identify any that could have a future impact?



Andy Peat

Chief Brand & Product
Officer

Lift Brands

apeat@liftbrands.com

-  New Zealand
-  Australia
-  United States
-  Canada
-  United Kingdom
-  Ireland
-  Japan
-  Taiwan
-  Hong Kong
-  Indonesia
-  Philippines
-  Spain
-  Netherlands
-  Georgia

A world map with city lights glowing in orange and yellow against a dark blue background. The map is centered on the Atlantic Ocean, showing North and South America on the left and Europe, Africa, and Australia on the right.

WHERE

The Franchise Development
Strategic Growth Workshop



**WIN YOUR
LOCAL MARKET**



**WORLD
DOMINATION?**

THE ANSWER, LOCAL MARKET DOMINATION FIRST.

GROW WELL, NOT FAST.

Get The Right Advice

ARE YOU READY TO EXPAND? KEY QUESTIONS:

- Do you have a profitable model?
- Is the model repeatable?
- Do you have the capital?
- What might need to be localized and is that a deal breaker?
- Do you want your life to change?

ENSURE THIS PERSON IS SOMEONE WHO,

- Has scaled internationally, not just studied it
 - Understands the right expansion structure
 - Is well versed in capital strategy
 - Understands localization realities
- Will challenge your timing

RECOMMENDATION

Kaleidoscope Growth Advisors

Ali McElroy - CEO

www.kaleidoscopegrowth.com

What Structure Suits You?

AREA DEVELOPMENT

You grant one operator the right to open and operate multiple units in a defined territory. They do not sub franchise.

MASTER FRANCHISE

You grant a local partner the right to sub franchise in a country or region.

CORPORATE STORES OR JOINT VENTURE

Do it yourself or form an entity with a local partner.

PRO-TIP

International expansion doesn't fail because of strategy. It fails because of the wrong structure and the wrong partner.

Going International.....Which Country First?

FR France
ES Spain
US United States
IT Italy
TH Thailand
TR Turkey
MX Mexico
GB United Kingdom
JP Japan
GR Greece

Most popular vacation countries

Which Country First?

WHAT OFTEN DRIVES LOCATION CHOICE?

- Taking the first international offer you get.
- Interest coming from existing customers.
- Is my product ahead of its time in other markets or behind?

COUNTRIES TO CONSIDER

- Strong middle class + target demographic density
- Cultural fit for your concept
- Proven category demand (not just interest)
- Stable regulation and franchising environment
- Ease of hiring and operating
- Language
- Politics

KEY TAKEAWAY

The goal isn't global presence.
The goal is profitable presence.

Story Time



Starbucks entered Australia in the early 2000s expecting its global playbook to work. But Australia already had a strong café culture, high expectations for coffee quality, and lots of independent competition. Expansion didn't match local demand and habits, and they had to close a large number of stores and rethink the approach.

TAKEAWAY

Brand power doesn't replace product-market fit.
"If locals already have a better version of what you sell, scale won't save you."

Story Time



When KFC entered Japan in 1970, it didn't just bring fried chicken — it crafted a cultural tradition. Facing a market with no Thanksgiving or traditional turkey dinner, the brand leaned into an entirely different idea: **Christmas chicken**.

Local marketing in the 1970s positioned KFC as the place to celebrate Christmas, and the concept stuck. Today, eating KFC at Christmas is a nationwide custom, with families pre-ordering party barrels weeks in advance.

TAKEAWAY

KFC didn't ask, How do we sell chicken in Japan? They asked, Where do we fit in Japanese life?

Story Time



IN India – No Beef

- McAloo Tikki (spiced potato burger)
- Paneer-based options
- Beef removed entirely

JP Japan – Teriyaki Burger

- Teriyaki McBurger
- Shrimp Filet-O

DE Germany – Beer

- McDonald's serves beer in some locations

PH Philippines – McSpaghetti

- Sweet-style spaghetti with fried chicken

TAKEAWAY

"If McDonald's is humble enough to change the burger, why do we think our brand doesn't need to change?"

Most Concepts Have To Adapt

CONSIDER THE FOLLOWING

- Customer behaviors and expectations
- Price sensitivity and wage structures
- Real estate dynamics
- Marketing channels
- Competitive set
- Labor costs
- Marketing restrictions
- Payment culture

WHAT MUST STAY CONSISTENT

- Brand promise
- Core unit economics
- Operating standards
- Training and support systems

KEY TAKEAWAY

Protect unit economics like your life depends on it (because it does).

We don't copy paste a franchise model internationally.
WE TRANSLATE IT.



The Franchise Development Strategic Growth Workshop



James Stapleton, CFE

Strategic Sales Advisor & Vice President
Of Franchise Development for Caring Tra...



Bobby Kelley CFE

Vice President of Franchise Development at
Home Helpers® Home Care | Certified Franc...



Erica Tarnowski

Director of Franchise Development | Aspiring
comedian | Non-astronaut



Andy Peat

Snap Fitness Chief Brand & Product Officer |
Fitness On Demand CEO



Breakout Bonanza
Scan the code at the End of a Tuesday AM Breakout Session to
Earn 2 points!



Scan code in your event app



Unable to scan?
Enter code: **TUEBRE**

