2026 FRANCHISE MARKETING PLAYBOOK

SCORPION

iFA INTERNATIONAL FRANCHISE ASSOCIATION PREFERRED VENDOR

What the Best Franchise Brands Do Differently

A playbook that gives franchise brands the data, structure, and standards they need to grow profitability at every level of their systems.

Executive Summary

The Marketing Playbook is grounded in custom research and designed to provide franchise brands with the data, structure, and standards they need to grow profitably at every level of their systems.

Scorpion surveyed more than 2,000 consumers and 1,000 business owners to understand how today's customers find and choose service providers, while survey data collected from more than 100 franchise brand leaders at the IFA Annual Convention captured an honest picture of where franchising currently stands. The research revealed a meaningful performance gap: nearly half of franchise brands graded their own marketing a 'C' or lower.

This playbook was built to close that gap, covering everything from brand standards and digital infrastructure to KPI frameworks, franchisee onboarding, and a governance cadence that keeps the whole system accountable over time.

The state of franchise marketing

48% of franchise brands self-grade their marketing 'C' or lower

1 in 3 brands are working to improve internal marketing alignment

25% of brands struggle with data-driven marketing

1 in 4 brands have no standard timeframe for speed-to-lead

83% of consumers start their search online; 61% never click past the 5th result

What separates growing brands

66% higher rate of same-store sales growth above 5% among brands with a speed-to-lead of 30 min or less

9 in 10 brands that rated themselves a 'B' or higher, review marketing strategy at least monthly

70% of brands reinvesting more than 5% of monthly revenue reported same-store sales improvement

3x more likely to see more than 5% growth when franchisees are involved in marketing strategy

67% of brands tracking marketing in real-time report improvement, vs. 46% tracking annually

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The New Standard for Franchise Growth

The divide between corporate strategy and local execution continues to grow, and for franchise brands it's important to align corporate strategy and local execution. By creating a marketing playbook, franchise brands and their networks can operate more cohesively, uniting local marketing efforts with national brand strategy.

To create a useful and effective playbook, IFA's Jennifer Brandeen and Scorpion's Gabriella Ferrara sat down to discuss why this is so important to brands. "Rather than every brand reinventing the wheel, we wanted a playbook that turns best practices into checklists, timelines, and metrics, so that a new or growing system can plug in on day one," Jennifer said.

"A marketing playbook gives franchisees a clear roadmap with data-supported paths to growth, and it will make it easier for them to launch, market, and scale profitably while still aligning with their brand standards."

Jennifer Brandeen
COO, IFA

This marketing playbook serves as a guideline to help your brand create a functional and efficient playbook for your own network. When deployed, every location will understand the standards you've established.

Franchise Owners Give Themselves a 'C' in Marketing

To gain a better understanding of how franchises feel about the current state of marketing, we surveyed attendees at the 2026 IFA Annual Convention. The results were striking: **nearly 50 percent of franchise brands grade themselves a 'C' or lower** for their marketing efforts. That lack of confidence reflects how quickly the landscape is changing. Franchise brands must be more intentional with their national marketing strategy while also supporting the local efforts of every franchisee.

The disconnect often lies in the balance between national reach and local relevance. When a brand gets that balance right, the results follow. Brandeen describes the magic of franchising this way: "A national brand provides the credibility and the support, but the local ownership is so key. The system's strength lies in both the brand recognition and the success of the local franchise execution. When those two aren't connected, or they're misaligned, is where we often see challenges."

From Activity to Strategic Focus

Whether you're an emerging brand or a more seasoned network, it's easy to focus on marketing activities instead of results, making it harder to decide where to invest your marketing dollars next.

"Data tells the story and proves where brands and franchisees should focus. Without data, what brands and franchisees hypothesize is the issue is incorrect 9 out of 10 times," Jennifer said.

Historically, many brands have struggled to tie marketing investments to the revenue generated at each location. Without this connection, locations rely on performance indicators that don't actually impact their bottom line. Vanity metrics like website visitors, TikTok views, and social media followers can help you understand brand equity, but they won't tell you which marketing channels are driving real revenue.

"There's such a lack of data and transparency out there in franchising," Jennifer said. "We want to provide more transparency to help brands grow."

No matter what industry your franchise serves, integrating your marketing and operational data gives you a clear picture of what is delivering the highest return on investment. Scorpion's unique designation as ServiceTitan's only preferred digital marketing partner meant they were able to create an integration that provides clarity on marketing spend and a direct link to jobs booked and revenue earned.

"The playbook provides a strong strategic foundation, connecting sound marketing principles with practical execution while reinforcing the importance of alignment, accountability, measurable results, and partnership across the franchise system."

Gary Robins
Vice Chair, IFA Board of Directors
President, The G & C Robins Company

The Path to Profitability at Every Location

This playbook is designed to move beyond top-line revenue and address every level of your marketing. To scale profitably, franchisors must treat marketing as an operating system: easy to understand, simple to implement, and foundational to revenue generation.

As Brandeen puts it, marketing should be treated as "a unit economics operating system, ultimately responsible for the profitable growth at the unit level."

Brands making this shift are also re-examining how they allocate marketing spend. Those in a "back-to-basics" mode, pausing to audit both strategy and operations, are finding that even when top-line revenue is growing, squeezed margins signal the need for a more disciplined approach grounded in data. To help franchises develop a marketing playbook that works, Scorpion compiled a range of insights, including consumer sentiment, current franchise efforts, and the performance metrics that matter most.

"From a marketing perspective, I've seen how critical clear communication and aligned expectations are across a franchise system. When you equip franchisees with the right guidance and tools, you empower them to make smarter decisions that fuel local revenue and drive sustainable growth across the brand."

Gabriella Ferrara
VP of Strategic Sales, Scorpion

83% of consumers head online first when looking to hire a service provider

2026 Scorpion Consumer Expectation Survey, 2,000 homeowners

The Modern Consumer Landscape: Matching Brand Standards with Customer Reality

Customer expectations are always changing. In franchising, that reality carries more weight because you're not managing only one location's customer relationships; you're managing thousands of them across every location that carries your name.

The customer your brand standards were built for has changed, and the difference between those standards and current customer expectations is wider than most brand owners realize.

What our research showed should impact how you set brand standards. Understanding what your customers want is the difference between a thriving system and one that's quietly losing ground location by location.

Today's customers search before they call, compare before they decide, and expect an immediate response. The playbook that worked five years ago is costing you business today.

Creating a Research-Led Strategy

Scorpion recently surveyed 2,000 homeowners, 1,000 business owners, and 100+ franchise brands to understand the state of franchise marketing and what it means for service businesses.

2,000 HOMEOWNERS

1,000 BUSINESS OWNERS

100+ FRANCHISE BRANDS

The Digital Discovery Phase: Winning the "First Five"

In the franchise world, if a location isn't visible during the initial search, the brand has already lost.

83% of consumers start their journey online

61% of those users will not look past the 5th search result

The Implication for Your Network

Market Share Protection

If your local franchisees aren't optimized for "near me" searches, focused on "search everywhere optimization," or investing in Local Services Ads (if applicable), your competitors are capturing more than 80% of the available market. Consider what that means at scale: **if you have 50 locations and only half of them are properly optimized, you've essentially handed the other half of your territories to the competition, and you may not even know it's happening.**

Brand Integrity

Consumers equate search ranking with authority. If a location isn't at or near the top of the results, the consumer subconsciously perceives it as less established than competitors that are appearing there. Your franchisee in that market may be doing exceptional work, but the customer will never find out, because they've already called someone else. Search visibility has to be a non-negotiable standard, not a suggestion.

The Comparison Trap

Your marketing standard must ensure that when a customer does find you, your digital presence, including reviews, photos, videos, and messaging, is stronger than the other options they're vetting. If your listing has outdated photos, a handful of old reviews, and no clear description of services, you've already lost the customer, even if your franchisee does better work than everyone else in that zip code.

Scorpion's research found that 76% of consumers contact two to five companies before deciding.

Communication and the Experience: Beyond the Transaction

The brand standard for a franchise can no longer be just a clean logo or a uniform. It must extend to the communication experience. Consumers now judge a brand by how easy it is to reach and how quickly you respond when they do.

59%	36%	74%
of consumers expect omnichannel communication (text, chat, email)	of customers view a "human touch" as a deciding factor	say social media content influences their hiring decision

Where Leads Are Being Lost Right Now

Speed to Lead

Lead leakage is one of the most common and costly problems in a franchise model. If a customer submits a web form at 7 p.m., and nobody follows up until the next morning, they've already booked with a competitor.

Brands with a speed-to-lead time of 30 minutes or less are 66% more likely to report same-store sales growth above 5%.

Our research indicates that as many as 20 to 30% of franchise brands never respond to inbound leads at all. In many cases, the problem isn't the marketing; it's the conversion. Spending more on lead generation without solving for response rates, or intake issues, is wasting your marketing dollars.

Standardizing communication tools like integrated web chat or SMS ensures that leads are captured instantly, regardless of which location they contact.

Emotional Connection

Showing the human side of a local business is what prevents your franchise from feeling like a faceless corporation. Team photos and videos, community involvement, and a recognizable face behind the brand are all details that make a difference. This is the competitive position franchising is built for: local feel with national-scale reliability. Corporate brands can't replicate it and independent operators can't match the infrastructure. That middle ground is a genuine competitive advantage, but only if your marketing standards capitalize on it deliberately.

The AI and Technology Mandate: Meeting the New Standard of Speed

Technology is now a customer-facing expectation, which creates both opportunity and risk for franchise owners.

65%	42%	34%
of consumers want AI-enhanced intake	want AI to answer their common questions immediately	of Millennials and Gen Z already trust AI "most of the time."

What the Next Generation of Buyers Already Expects

24/7 Availability

A franchise system that relies solely on human staffing to answer questions will lose the 42% of customers who want answers immediately. That's nearly half your potential market walking away because nobody was available at 9 p.m. on a Tuesday. Standardizing AI-driven chatbots or automated intake ensures your brand is open even when the local office is closed, functioning like a front-desk employee who never calls in sick and always stays on message and brand.

Consistency of Information

One of the greatest operational risks in any franchise system is a local employee giving incorrect, off-brand, or inconsistent information during that critical first touchpoint. Pricing confusion, service misrepresentation, or an inconsistent tone erodes trust at the local level in ways that are hard to track and even harder to fix. AI-enhanced intake addresses this by ensuring that every prospect receives the same accurate, brand-approved information every time.

Building for the Next Generation of Buyers

As Millennials and Gen Z become the primary homeowners and decision-makers, their preference for AI-driven, frictionless interactions will become the majority expectation. Implementing these standards now is about making sure your franchise system doesn't find itself playing catch-up in three years while competitors have already built the infrastructure. **The brands that win the next decade are the ones that standardize technology today.**

Setting the Standard Your Customers Are Already Expecting

Aligning your business with these expectations is about operational excellence at every level of your system. When you set a standard that mandates high search visibility, omnichannel communication, and AI-driven intake, you ensure your brand meets the needs of the modern consumer at every touchpoint. A good service or experience used to be enough. Today the franchise owners who struggle most are often the ones doing excellent work that customers never find, never hear back fast enough, or never get the right information at the right time. These standards exist to create consistency across the network. When applied network-wide across your entire system, the result shows up where it matters: additional services purchased per location, stronger retention across your network, and a brand that grows in value rather than eroding quietly from within.

76% of consumers reach out to 2 to 5 companies before making a decision

2026 Scorpion Consumer Insights Report, 2000 Respondents

The Performance Gap: Aligning Corporate Strategy with Local Execution

Even the strongest franchise brand can only perform as well as its least-optimized location. A single under-performing unit dilutes the brand, depresses system-wide averages, and quietly erodes the trust that corporate has spent years building. Data points to a significant disconnect between the marketing goals of the corporate office and the actual performance at the local level.

To set a true marketing standard, brand owners must identify where these gaps exist and build a framework to close them. To better understand the current state, Scorpion and the IFA surveyed franchise owners during the 2026 IFA Annual Convention. What those responses revealed is both a warning and an opportunity. Franchises know they are underperforming and want to do better. The question is where to start.

Assessing the Current State of Franchise Marketing

The first step in improving your system is an honest assessment of where it actually stands.

48% **of franchise brands grade their own marketing performance as a "C" grade or lower**

The Cost of Average

When a quarter of your locations are underperforming on marketing, the drag isn't contained to those units. It pulls down your brand's aggregate search visibility across entire markets, reduces the National Advertising Fund's collective impact, and creates an uneven customer experience that undermines the consistency your brand promises. **A customer who has a seamless experience at your Dallas location and a frustrating one in Phoenix doesn't blame the Phoenix franchisee; they blame the brand.**

The Opportunity in the Number

A 25% underperformance rate is a solvable problem. It means 75% of your system already knows what good looks like. As a franchisor, you can identify what your top-performing locations are doing and systematize it across every unit. When you standardize those behaviors across the whole system, everyone benefits: franchisees perform more consistently, enterprise value increases across every unit, and the case for prospective franchisees evaluating your network only gets stronger.

Overcoming the Data Struggle

A primary reason for the performance gap isn't effort; it's visibility. Franchisees who can't see which marketing activities are driving revenue have no reliable basis for making decisions. They guess, they overspend in the wrong places, and when results don't materialize, they lose confidence in marketing altogether. Franchisees have access to the data. The standard is making sure it gets used.

25% **of brands admit they struggle with data-driven marketing**

Proving ROI

Franchisees are often hesitant to invest in marketing when they can't draw a direct line to revenue. This is one of the most common sources of friction between franchisor and franchisee, and it's largely avoidable. Your brand standard must include a reporting structure that gives franchisees clear visibility into which channels are driving purchased services in their specific territory. When franchisees can see that their SEO investment produced 14 booked service calls last month, the conversation about marketing investment changes entirely.

Eliminating the Guesswork

Without territory-level data, budget decisions get made on assumptions. A franchisee in one market may be investing in the wrong channels simply because it's where other markets are seeing success. Data-driven marketing allows corporate to see which channels are actually driving leads for specific territories and make corrections before a location begins to slip.

Customer Stories

From Data Chaos to Franchise Trust: The Premium Service Brands Transformation

Three years ago, Premium Service Brands (PSB) had a data problem. Marketing, call centers, and franchise business coaches all operated in isolation, and the lack of communication between them were costing the brand. "Vendors had their own data, and sometimes it didn't match with our data," explains Roxanne Conrad, COO of PSB.

That inconsistency impacted franchisee trust and contributed to a decline in sales. The brand was also focused almost entirely on top-line revenue growth, which meant the bottom-line profitability that actually mattered to owners was going untracked. Conrad led a full overhaul of the brand's data infrastructure. The foundation was a centralized data warehouse that brought every source into a single view, which then made it possible to build location-level dashboards with complete transparency across the system. PSB also launched what Conrad calls an internal PR strategy, communicating changes to franchisees with a simple message: you asked, you gave feedback, we listened, and here is what we are going to do about it. The shift to data-driven coaching changed the nature of every business conversation. Franchisees can now see how their location stacks up against top performers, but only by getting on a call with their coach. That built-in incentive drives engagement with the coaching process itself, and the visibility it creates rebuilt enough trust that owners became willing to try new marketing efforts, knowing the data would prove the ROI within 90 to 180 days.

THE TAKEAWAY

As Roxanne Conrad, COO of PSB, puts it, the data allowed them to "take the feelings out of it" and put "the power back in franchisee hands to start making better decisions."

Solving Internal Alignment Friction

Performance issues are not always a marketing or operations problem. Often, it can be communication or alignment problem. One in three franchise brands is actively working to improve internal alignment, and the friction points are consistent across the industry.

1 in 3

brands are prioritizing better alignment, citing two major friction points: franchisees not being involved early enough in strategy development, and small corporate support teams struggling to keep pace with a growing number of locations.

The Buy-In Factor

Marketing standards that arrive as directives from corporate without context or input tend to meet resistance, not because franchisees don't want to perform, but because they don't understand the reasoning behind the requirements. The data here is clear: brands that work collaboratively with local owners on marketing strategy are three times more likely to report same-store sales growth above 5% than those that don't. A franchisee who understands that 76% of consumers are vetting two to five businesses simultaneously is far more likely to prioritize it than one who was simply told to get more reviews.

Building a System That Scales

As a network grows from 10 locations to 50 to 100, the corporate marketing team will not grow at the same rate. A well-built marketing standard keeps every location aligned through shared expectations, tools, and reporting structures rather than constant intervention from corporate. Every new franchisee who joins knows exactly what is expected of them from day one, without requiring a dedicated onboarding call for every marketing decision they'll face in year one.

The AI Implementation Standard

Understanding consumer expectations is only one part of the equation. One other thing to consider is how franchise brands are actually adopting AI, where the gaps are, and what standardizing AI usage means for your system's ability to compete.

How Franchises are Leveraging AI

59%
Content Creation (emails, social, ads)

58%
Market Research (understanding local competitors)

48%
Lead Intake (chatbots and automated replies)

38%
Marketing Strategy (predicting trends)

7%
of brands are not using AI at all

The Intake Gap

The most urgent number above is the 48% adoption rate for AI-driven lead intake. The connection to revenue is direct: among brands with a "30 minutes or less" speed-to-lead, 71% are using AI to assist with intake, compared to just 38% among those with a 60-minute or longer response time. A franchisee who is out on a job site at 2 p.m. on a Wednesday isn't choosing to miss leads; they don't have the infrastructure to capture them. Mandating AI-driven intake as a brand standard improves this across every location, regardless of team size or staffing.

Quality Control at Scale

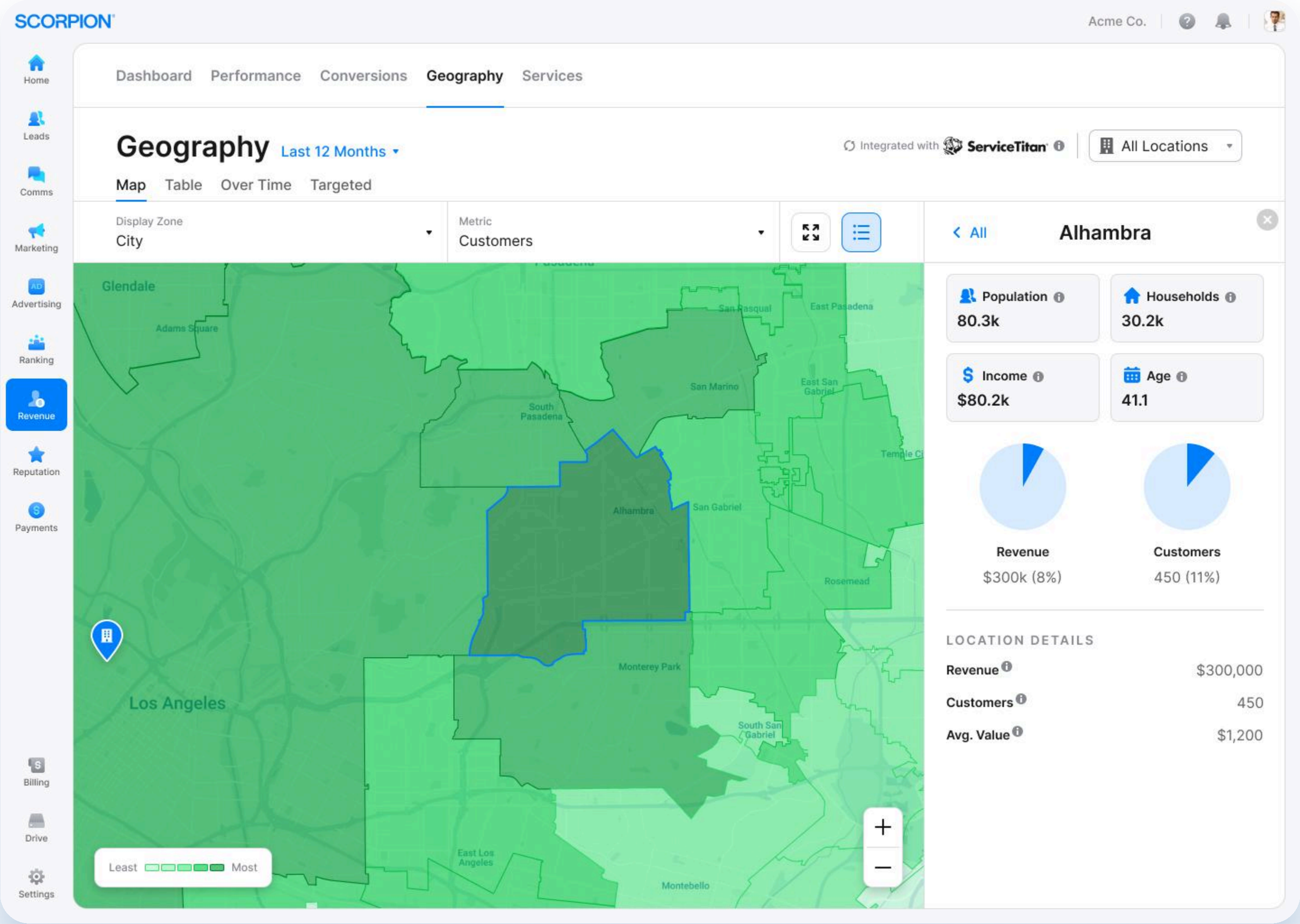
The 59% adoption rate for content creation represents both an opportunity and a risk. Franchisees who are already using AI to generate social posts, emails, and ad copy are saving time, but without guardrails, they're also producing content that may be off-brand, inconsistent in tone, or legally problematic for certain verticals. Your marketing standard should address this directly: provide approved AI tools, brand-specific prompts, and a clear review process for locally generated content.

The Efficiency Argument

For franchisees who are skeptical of AI, the most persuasive case isn't about technology; it's about capacity. A local owner running a five-person operation cannot staff a marketing department. AI gives that franchisee the ability to compete with larger operators in their market without adding headcount. When corporate frames AI adoption as a tool that makes the local business more competitive rather than a mandate from headquarters, buy-in follows naturally.

Creating Consistency Across Your Network

Your top-performing locations have already demonstrated what good looks like. When that data is properly structured, used to make decisions, and shared, every franchisee has the visibility to close the distance between where they are and where those locations perform. Franchisees who understand the reasoning behind a standard, not just the standard itself, become partners in enforcing it.



The Framework for Success: Standards, Data, and Accountability

To align every location, franchises need to move from marketing as a suggestion to marketing as a standard, with defined expectations, measurable outcomes, and a management process that holds the system accountable over time.

Defining the Marketing Standards

A standard is only effective if it is clearly defined and measurable. Vague guidance, such as "maintain a strong digital presence" or "engage with customers on social media," creates the conditions we identified. When franchisees are left to interpret what good looks like, you get 50 different approaches across 50 locations, and your brand pays for the inconsistency.

Omnichannel Communication

Earlier, we established that 59% of consumers expect to reach businesses through text, chat, and email. Your brand standard must define exactly what meeting that expectation looks like at the local level: which tools franchisees are required to use, what response time is acceptable, and how leads and revenue captured through each channel are tracked. Having a Facebook page is not an omnichannel strategy. A mandated, tool-supported process for how franchisees capture and respond to leads across every channel is.

The NAF Value Proposition

One of the most consistent sources of franchisee resistance to marketing standards is a lack of clarity about what the National Advertising Fund is actually producing at the local level. When franchisees can see a direct line between NAF investment and the local search visibility that drives booked services in their territory, the conversation changes. Your playbook should include a clear, plain-language explanation of how NAF investment benefits individual units, backed by territory-level data wherever possible.

Brand Guidelines

Guardrails work best when they are specific enough to be actionable and simple enough to follow. As noted, 59% of franchise brands are already using AI for content creation, which means locally generated content is being produced at a volume and speed that makes manual review difficult. Providing approved AI tools, pre-built brand prompts, and a clear review process for high-visibility content gives franchisees the flexibility to operate efficiently while keeping local output consistent with the brand standard your customers recognize.

Customer Stories

Barking Up the Right Tree: Camp Bow Wow's Multi-Channel Evolution

With more than 225 locations, Camp Bow Wow faced a challenge that most franchise brands recognize immediately: how do you balance national brand awareness with trackable local leads? Franchisees were making spending decisions based on instinct rather than data, which made it nearly impossible to justify investments across multiple channels. The brand needed a way to help owners understand that national and local marketing were not competing priorities, but complementary ones working toward the same outcome.

Kate Wright, VP of Marketing, restructured local spending requirements to create a clear split between trackable digital spend and local networking activity. National efforts stayed focused on brand awareness while local investment focused on conversion, giving each level of the system a defined role.

That clarity gave Wright the infrastructure to test emerging channels. TikTok was one of them. The key insight was that content on the platform needed to feel native to it, so that it was engaging to viewers as they scrolled. "We did a few different pieces of creative," Wright explains, "and the influencer style performed way higher." The discipline of tracking made the difference. By measuring what was actually working, the brand surpassed its sales forecasts and generated additional budget for further testing.

More importantly, Wright was able to show franchisees in concrete terms how investing in national brand awareness made their local conversion channels, including paid search, work harder. Owners who had once been skeptical became engaged when they could see the results.

CAMP BOW WOW'S RESULTS

7.6M+	23K	1.9M+
Impressions	Landing page views	Unique users reached

Key Performance Indicators (KPIs) and Data-Driven Insights

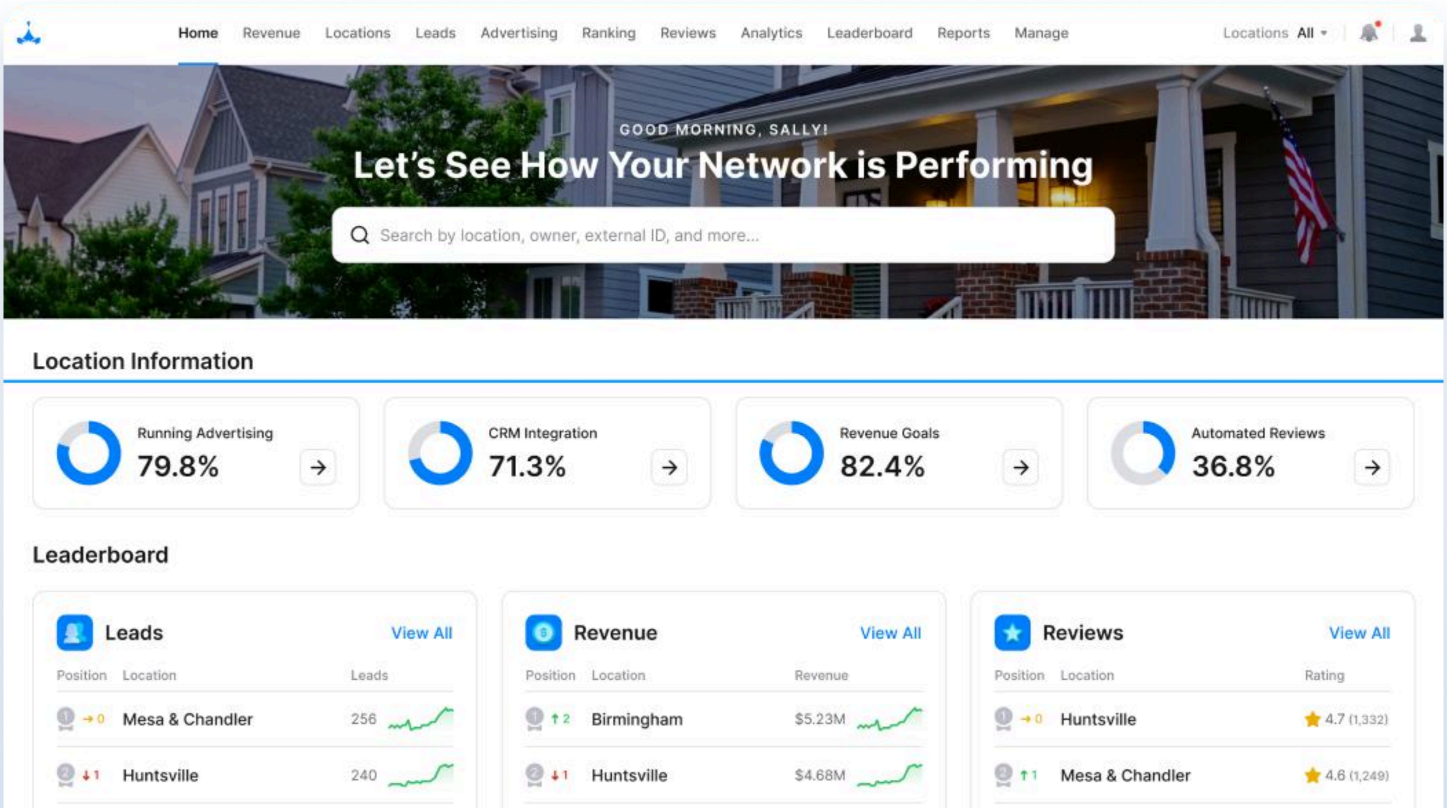
25% of brands struggle with data-driven marketing, and the consequence is franchisees making budget decisions without the information they need. The solution isn't more data. It's the right data, tracked consistently, with a shared understanding of what each metric means for local business performance.

Investment vs. Revenue

Track the percentage of local revenue being reinvested into marketing at each location. The data provides a clear benchmark: **70% of brands reinvesting more than 5% of monthly revenue reported improvement in same-store sales, compared to just 56% among those investing at lower levels.** A standard minimum of 5% ensures that locations aren't systematically underinvesting in the activities that drive new business. Among paid channels, SEO, advertising, and search, in that order, have demonstrated the strongest returns. Local community events and grassroots efforts remain an underutilized driver of engagement as well.

Conversion Rates

Marketing spend is wasted if the intake process is broken. A location can rank at the top of local search results and still lose the majority of its inbound leads if nobody answers the phone. Monitoring how many leads convert to booked services at each location tells you whether you have a marketing problem or an operations problem. Those require very different interventions, and your playbook should distinguish between them.



Attributed ROI by Channel

Your reporting structure should give both corporate and individual franchisees a clear view of which channels, including local search, paid ads, social, and direct, are driving revenue in each specific territory. When a franchisee in a suburban market can see that their investment in local search produced a 12x return last quarter while their social spend produced almost nothing, the next budget conversation becomes straightforward. The goal isn't to dictate channel mix from headquarters; it's to give franchisees the data to make the right call themselves.

Real-Time Performance Tracking

67% of brands that track marketing performance in real-time or on a daily basis reported improvement in same-store sales, compared to only 46% among those reviewing performance annually or on an ad-hoc basis. Monthly reporting is the baseline. The brands pulling ahead are the ones building dashboards that surface performance concerns before they compound. When a location's metrics decline, the reporting structure should tell you whether the issue is marketing investment, conversion rate, channel mix, or intake response time, so the coaching conversation that follows is specific and actionable.

The Best-in-Class Benchmark

Your highest-performing locations are the most valuable diagnostic tool in your system. Use their metrics to establish a concrete internal standard, not as a pressure tactic, but as proof that the standard is achievable. A franchisee skeptical that a 4.8-star rating with 200 reviews is realistic in their market will think differently when they can see that three locations in comparable markets hit that number last year. Peer performance data is often more persuasive than corporate directives.

"A playbook is a living, breathing document. We should not build one at the start of 2026 and never look at it again until 2027. There's too much that is constantly changing. If you're not looking at your marketing strategies and performance at least monthly, you will see the negative impact, whether that's in same-store growth or how you're evaluating your own marketing performance."

Gabriella Ferrara
VP of Strategic Sales, Scorpion

The Three Steps to Long-Term Success

The standards and KPIs in this playbook only produce results if they are implemented consistently and maintained over time. That requires a management process with an ongoing cycle that keeps corporate and local execution in sync as your system grows. The framework has three components: Alignment, Implementation, and Accountability. Each one builds on the last, and skipping any step is where most franchise systems stall.

Alignment

The foundation of consistent execution is shared understanding. Before a franchisee can be held to a standard, they need to understand what it is, why it exists, and how it connects to their own business outcomes.

Alignment means bringing franchisees into the data and the reasoning: showing them the consumer research, walking them through what a 25% underperformance rate costs the system, and explaining how NAF investment translates to local search visibility in their market. Franchisees who understand the standard become partners in enforcing it. Those who receive it as a mandate become obstacles.

Implementation

Alignment without tools is a strategy that exists only on paper. Once franchisees understand the standard, corporate can best equip their franchisees by following it as straightforward as possible. That means providing the technology infrastructure, including AI-driven intake, omnichannel communication tools, and reporting dashboards, so franchisees aren't asked to meet a standard on their own.

It also means providing training, approved templates, and a clear escalation path for franchisees who run into problems. The easier you make compliance, the higher your adoption rate.

Accountability

Accountability is the step most franchise systems handle inconsistently. It doesn't mean penalizing underperformance; it means creating a regular cadence of review that catches problems early, identifies the cause, and provides a path to correction. Monthly data audits against the KPIs established in Section II give corporate a system-wide view of where performance is on track and where it's slipping.

Onboarding New Franchisees Into the Marketing Standard

A marketing playbook only delivers on its promise if every franchisee, including those who join after it's been built, enters the system with the same foundation. The standards, tools, and expectations established in this chapter cannot be assumed. They have to be transferred deliberately, at the moment a new franchisee is most receptive: the beginning.

A new franchisee who launches with the right marketing infrastructure, clear KPI expectations, and an understanding of why the standards exist will outperform a franchisee who figures it out over 18 months of trial and error.

The Pre-Launch Checklist

Before a new location opens, corporate should confirm that the following pieces are in place:

- Google Business Profile is claimed, verified, and fully completed, including accurate service categories, hours, photos, and a brand-approved business description.
- Omnichannel communication tools are active and tested. Web chat, SMS, and email intake are connected and routing correctly before the first lead arrives.
- AI-driven intake is configured with brand-approved responses so that leads submitted outside business hours are captured and acknowledged immediately.
- Reporting dashboard access is granted and the franchisee has completed at least one walkthrough of the KPIs they'll be held to: investment vs. revenue, conversion rate, and attributed ROI by channel.
- Brand guidelines and approved AI prompts have been provided, reviewed, and acknowledged in writing.

The most successful brands are ensuring that every location is marketing-ready at launch.

The First 90 Days

Days 1-30

Foundation: The franchisee's primary focus is visibility. Are they appearing in local search results? Is their Google Business Profile generating impressions? Is intake capturing every lead? Weekly check-ins during this phase should be brief and data-focused.

Days 31-60

Conversion: Now the focus shifts to what happens after a lead arrives. Is the franchisee's conversion rate tracking with system benchmarks? Where are leads dropping off? Identify franchisees who are strong on visibility but struggling with responsiveness, a common pattern that requires an operational fix rather than a marketing one.

Days 61-90

Optimization: By the end of the first 90 days, the franchisee should have enough data to begin making informed decisions about channel mix. The goal at this stage is to transition the franchisee from following the standard to understanding it well enough to advocate for it themselves.

Connecting New Franchisees to the System

One of the most underutilized resources in any franchise system is the performance data of existing top-performing locations. As part of onboarding, corporate should provide new franchisees with a benchmarking snapshot showing what a high-performing location in a similar market looks like across review count, conversion rate, speed-to-lead, and channel ROI. This makes the standard feel achievable rather than aspirational and gives the new franchisee a concrete target.

This Is How Consistent Franchise Systems Are Built

The difference between a franchise system that grows predictably and one that plateaus comes down to the consistency of execution.

When standards are undefined, when data is unavailable, and when accountability is inconsistent, individual locations make individual decisions. The brand absorbs the cumulative cost of those variations, location by location, quarter by quarter.

This framework is how you close that gap. Clear standards tell your franchisees what good looks like.

Clear standards tell your franchisees what good likes and data shows each location how they're performing. It's important to have consistent accountability so that underperformance gets addressed before it compounds.

When these three elements work together across your full system, the results show up where they matter most: more revenue per location, stronger conversion rates across the network, and a brand that earns its place in the top results in every market it enters because the system is built to perform there consistently.

Running the System: Governance, Escalation, and Playbook Maintenance

A marketing playbook that sits on a shelf is a document, but a marketing playbook embedded into the operating rhythm of your system is infrastructure. Three things every franchise brand needs for consistent education include: a review cadence that keeps corporate and the network in sync, an escalation framework that catches underperformance before it compounds, and a process for keeping the playbook current as the marketing landscape changes.

The Governance Cadence: Who Reviews What, and When

One of the most consistent findings from the 2026 IFA Convention survey was that 1 in 3 franchise brands struggles with internal alignment. The friction most commonly stems from franchisees not being involved early enough and from corporate teams that can't scale their support as the network grows. A structured governance cadence solves both problems without requiring a larger team.

The table below defines the recommended cadence for a franchise system of any size. Smaller networks may combine the weekly and monthly reviews; larger systems may need to add regional layers between field coaches and brand leadership.

The structure should scale to your system, but the four levels of review should always be present in some form.

CADENCE	WHO	FOCUS	OUTPUT
Weekly	Franchise coach + franchisee	Speed-to-lead, intake volume, conversion rate	Flag any location below benchmark; immediate coaching action
Monthly	Corporate marketing + franchisee team	KPI dashboard review: investment %, channel ROI, same-store trends	Identify top/bottom performers; adjust channel mix recommendations
Quarterly	Brand leadership + marketing council	Strategy audit: are standards still aligned with consumer behavior?	Update playbook sections; revise benchmarks; surface peer data
Annually	Full system review	Brand equity, NAF performance, franchisee marketing self-grades	Playbook version update; new KPI targets; franchise advisory input

What a Monthly Marketing Review Looks Like

The monthly review is the operational heartbeat of the playbook. Done well, it takes 60 minutes and produces a clear picture of where the system stands, which locations need attention, and whether any channel or strategy recommendations need to be updated. Each review should cover:

- KPI dashboard walkthrough: investment vs. revenue by location, conversion rates, speed-to-lead averages, and attributed ROI by channel.
- Top and bottom performer identification: which locations are outperforming benchmarks and why; which are slipping and what the data suggests is the cause.
- Lead source analysis: are the channels generating the highest ROI consistent with what was recommended, or has something shifted in a specific market or territory?
- Franchisee feedback loop: what questions or friction points are franchise coaches hearing most frequently? Are any of those signals that a playbook section needs to be updated?
- Action items and owners: every location flagged for underperformance should leave the review with a specific next step, a responsible owner, and a follow-up date.

The monthly review is also the right venue for sharing peer performance data. The network learns more from its own top performers than from corporate directives alone.

The Franchise Advisory Council as a Governance Partner

We established that brands working collaboratively with franchisees on marketing strategy are three times more likely to report same-store sales growth above 5% compared to those where the home office acts alone. The governance cadence is where that collaboration becomes structural rather than occasional.

A franchise advisory council or marketing council, even an informal one, should have a defined role in the quarterly strategy review. This gives franchisees visibility into the data and reasoning behind those standards early enough to become advocates rather than skeptics. Franchisees who help shape the strategy have a direct stake in its success, and that dynamic is one of the most underutilized levers available to franchise brand owners.

The Escalation Framework: From Underperformance to Correction

Accountability is about catching problems early, identifying the cause, and providing a clear path to correction. The governance cadence surfaces the data. The escalation framework determines what happens next.

The most important function of the escalation framework is distinguishing between a marketing problem and an operations problem. These require different interventions, and confusing them is one of the most common ways franchise systems waste both time and money. A location that ranks well in local search but has a conversion rate half the system average doesn't need more marketing spend; it needs to answer the phone. A location that is fully responsive but generating almost no inbound leads has the opposite problem. The data, when properly structured, makes this distinction visible. The escalation framework determines who responds and how.

The framework below defines the recommended response to the most common performance signals. Every brand should adapt these thresholds to their own system benchmarks. The structure matters more than the specific numbers.

PERFORMANCE SIGNAL	TRIGGER POINT	RESPONSE	OWNER
Conversion rate below network average	2 consecutive months	Operational coaching call; intake audit; response-time review	Franchise coach + ops team
Marketing investment below 5% of revenue	Any single month	Reinvestment conversation; review FDD requirements; budget planning support	Business coach
Speed-to-lead exceeding 30 minutes	Identified in weekly check-in	AI intake audit; staffing review; tool configuration check	Field coach + marketing team
Google Business Profile incomplete or unverified	At any audit	Immediate remediation checklist; 7-day completion window	Corporate marketing
Review count or rating below system benchmark	Quarterly review	Review generation campaign; response-rate coaching	Field coach
Persistent underperformance across 3+ KPIs	Quarterly review, two consecutive quarters	Formal performance improvement plan; escalate to brand leadership	Brand leadership + legal if FDD-required

Customer Stories

The "Mini" Revolution: How Go Minis Mastered the Customer Journey

When Chris Walls joined Go Minis as President in 2020, franchisee trust in management was deteriorating. The most common question from owners was straightforward and pointed: “What am I getting for my royalties?” Without a unified operating system, corporate had no reliable way to see where leads were entering the funnel, where they were dropping off, or why. The result was a brand spending money to generate leads it had no infrastructure to convert. Walls oversaw the development of a proprietary operating system, GM 1, that finally brought the full tech stack together in one place. That visibility changed what coaching conversations looked like. Instead of general guidance, corporate could now point to specific data and have direct conversations about what was and was not working at the location level. Walls also implemented automated drip campaigns for prospects who had requested a quote but never booked.

"The open rate and the conversion rate on that were just phenomenal," Walls notes. Automation meant no lead went unattended, regardless of what was happening operationally at any given location.

What the data revealed was clarifying: ninety percent of the time marketing was not the problem, and other factors like operational issues, caused greater friction. In one case, Walls traced a conversion problem to a location where staff had simply stopped answering the phone during personal disputes. That kind of visibility, surfaced through data rather than assumption, is what made real coaching possible. Marketing report cards that ranked franchisees nationally created healthy competition and drew owners back into engagement with the system. Today, the majority of new sales at Go Minis come from existing franchisees, which is about as clear a signal of restored trust as a brand can get.

"Leads don't grow your business. What you do with them does."

Chris Walls
President & Chief Executive Officer, Go Mini’s

Principles for Effective Escalation

Separate diagnosis from response.

When a location triggers an escalation, the first step is always diagnosis, not action. Is the conversion rate low because of slow intake response, an undertrained team, or a channel mix mismatch? The data should answer that question before a coaching conversation happens. A franchisee who receives a generic directive to improve conversion without understanding the root cause will not improve. A franchisee who is shown exactly where in the funnel leads are dropping off, and given a specific fix, will.

Escalation should feel like support, not surveillance.

The framing of the escalation conversation matters as much as the content. Franchisees who feel that performance data is being used to monitor them will disengage from the reporting process. Those who experience escalation as corporate noticing something was off and reaching out to help will trust the system and use it. Building that culture requires consistency: the escalation framework must apply equally to all locations, and the response must always lead with coaching before it escalates to compliance.

Document everything.

For situations that escalate to formal performance improvement plans, particularly those with FDD-mandated requirements, documentation is both a legal necessity and an operational one. Keeping a record of what was flagged, what was communicated, what action was agreed to, and whether that action was taken protects the brand and gives incoming field coaches the context they need when a location changes hands.

70% of brands reinvesting more than 5% of monthly revenue reported an improvement in same-store sales

2026 State of Franchise Marketing Survey, More than 100 respondents

Managing Vendors and Tools at Scale

Consistency across locations also includes having approved tools and vendors for everything, from AI-driven intake to omnichannel communication platforms to reporting dashboards. That guidance only holds value if corporate actively manages the approved vendor ecosystem, evaluating performance, onboarding new solutions, and retiring tools that no longer serve the system.

As your network grows, the approved vendor list becomes part of your brand infrastructure. A franchisee who onboards with one set of tools and then discovers two years later that the recommendation has changed, with no communication or transition support, loses confidence in the playbook itself. Managing this well is a relatively small operational lift that pays significant dividends in franchisee trust.

Evaluating New Tools

Before adding any tool to the approved vendor list, corporate should assess it against three criteria:

- **Performance:** Does it demonstrably improve one of the KPIs tracked? Specifically, does it improve speed-to-lead, conversion rate, or attributed ROI?
- **Scalability:** Can a franchisee running a five-person operation realistically implement and use it without dedicated technical support? Tools that require significant setup or ongoing management burden will see low adoption regardless of quality.
- **Brand alignment:** Does it support brand-consistent communication, or does it create new opportunities for off-brand content or inconsistent customer experiences? This is particularly important for AI-powered tools used in content creation and lead intake.

Pilot new tools with a small cohort of franchisees, ideally a mix of high and mid performers, before recommending them system-wide. The pilot data becomes the proof point that makes adoption easier when you roll the tool out to the broader network.

Retiring Outdated Tools

Tools age out for two reasons: better alternatives become available, or consumer behavior shifts in ways that reduce a tool's relevance. In both cases, the transition should be managed deliberately rather than left to franchisees to figure out on their own. A retirement announcement without a clear replacement recommendation and a migration timeline creates exactly the kind of operational confusion that erodes franchisee confidence in corporate guidance.

When retiring a tool from the approved list, the playbook update process described in Section IV below should be triggered at the same time. Every reference to the retired tool should be replaced with the new recommendation before communicating to franchisees.

Keeping the Playbook Current: A Maintenance Protocol

The marketing landscape moves faster than any static document can keep up with. Google updates its search algorithm, and AI tools that didn't exist 18 months ago are now standard. Consumer expectations shift. Channel performance data changes. A playbook that was accurate when it was written can actively mislead franchisees if it isn't maintained.

The solution isn't to rewrite the playbook constantly. It's to establish a clear protocol for when and how updates happen, who initiates them, and how they are communicated to the network. The table below defines the triggers that should prompt a playbook review, and who owns each one.

TRIGGER	SECTION TO REVIEW	WHO INITIATES
Major platform change (Google, Meta, etc.)	Consumer Expectations; KPI standards	Corporate marketing
New consumer behavior data available	Consumer Expectations; omnichannel standards	Scorpion / research partner
System-wide KPI benchmarks shift significantly	KPIs & Data-Driven Insights; Accountability section	Corporate marketing + franchisee team
New AI tools adopted or deprecated	AI Implementation Standard; Pre-Launch Checklist	Corporate marketing + approved vendor
FDD requirements updated	Standards section; Accountability section	Legal + brand leadership
Annual system review	Full playbook audit	Brand leadership + franchise advisory council

The Playbook
Is the System

Every chapter in this playbook has pointed toward the same conclusion: what separates a franchise system that grows predictably from one that plateaus is the consistency of the infrastructure behind it.

The governance cadence keeps that infrastructure visible. The escalation framework keeps it honest. The vendor management process keeps it functional. The maintenance protocol keeps it current.

Together, these four operational mechanisms are what transform a marketing playbook from a document that describes best practices into a system that produces them, reliably, at scale, across every location that carries your name.

That is the standard worth building toward. When it's in place, the results show up where they always do: in the unit-level economics of individual franchisees, in the trust between corporate and the field, and in a brand that builds in value rather than eroding quietly from within.

"Rather than every brand reinventing the wheel, we wanted a playbook that turns best practices into checklists, timelines, and metrics, so that a new or growing system can plug in on day one."

Jennifer Brandeen
COO, IFA

Partner with Scorpion to Create an Effective Marketing Playbook

Visit scorpion.co/IFA to learn more.

SCORPION®

Stop Leaving Revenue on the Table

The franchise marketer's checklist for creating consistency across the network

This checklist an be used to audit your existing system, onboard new franchisees with confidence, and ensure consistent execution across every location that carries your name. When standards are clear, data is visible, and accountability is consistent, the results show up where they matter most: a brand that grows in value rather than eroding quietly from within.

YOUR PLAYBOOK CHECKLIST

1 Brand Standards

- Google Business Profile claimed, verified & fully completed
- Accurate NAP across all directories (Google, Yelp, Bing, Apple Maps)
- Each location optimized for "near me" searches
- Local Services Ads active where available
- Minimum review count & star rating thresholds defined
- Review generation process active at every location
- Review response time standard defined (≤48 hrs)
- Required communication channels defined (phone, chat, SMS, email)
- Maximum response time standard defined (≤30 min)
- After-hours AI intake configured with brand-approved responses
- Approved AI content tools & brand prompts distributed
- Brand voice, logo, and creative guidelines documented

2 New Franchisee Pre-Launch

- Google Business Profile live and verified
- All directory listings claimed and consistent
- Location page on brand website live and accurate
- Web chat, SMS, and email intake active and tested
- AI after-hours intake configured and tested
- Ad campaigns live before opening day
- Conversion tracking implemented and verified
- Budget meets FDD minimum requirements
- Review solicitation process trained and ready
- Reporting dashboard access granted
- KPI walkthrough completed with franchisee
- Brand guidelines acknowledged in writing

3 First 90 Days

- Days 1–30: Confirm search visibility & lead capture is live
- Days 1–30: Speed-to-lead average under 30 minutes
- Days 1–30: Ad campaigns spending on track
- Days 1–30: Review solicitation actively running
- Days 31–60: Conversion rate benchmarked vs. system average
- Days 31–60: Drop-off points in intake funnel identified
- Days 31–60: Marketing vs. operations root cause determined
- Days 31–60: Peer benchmarking data shared
- Days 61–90: Channel mix reviewed with 60 days of data
- Days 61–90: Franchisee making data-informed decisions
- Days 61–90: Year 1 marketing plan drafted
- Days 61–90: Franchisee can explain why standards exist

4 KPIs to Track

- Marketing spend as % of monthly revenue (min. 5%)
- Total inbound leads per month by location
- Lead source attribution tracked for every lead
- Average speed-to-lead time per location
- Lead-to-booked-appointment conversion rate
- Attributed revenue and ROAS by channel
- Same-store sales growth (MoM and YoY)
- Google Business Profile impressions & clicks
- Review count and average star rating
- Review velocity (new reviews per month)
- Phone answer rate (where call tracking is active)
- After-hours lead capture rate

5 Governance Cadence

- Weekly: Speed-to-lead & conversion reviewed per location
- Weekly: Locations below benchmark flagged for coaching
- Monthly: Full KPI dashboard reviewed by corporate & field
- Monthly: Top/bottom performers identified & actioned
- Monthly: Channel mix recommendations updated if needed
- Monthly: Franchisee feedback collected from field coaches
- Quarterly: Strategy audit — standards vs. consumer behavior
- Quarterly: Franchise advisory council input collected
- Quarterly: Playbook sections reviewed for accuracy
- Annually: Full playbook audit completed
- Annually: New KPI targets set
- Annually: Updated playbook version published & communicated

6 Escalation Triggers

- Conversion rate below average 2+ months → intake audit
- Marketing spend below 5% → reinvestment conversation
- Speed-to-lead over 30 min → AI & staffing review
- Google Business Profile incomplete → 7-day remediation
- Reviews below benchmark → generation campaign launched
- 3+ KPIs underperforming 2 quarters → formal PIP initiated
- Always diagnose (marketing vs. ops) before responding
- Escalation framed as support, not surveillance
- All escalations documented with agreed actions & dates

7 Vendor & Tool Management

- New tools assessed: KPI impact, scalability, brand alignment
- Pilot run with mixed cohort before system-wide rollout
- Approved vendor list reviewed quarterly
- Vendor KPI reporting aligned with internal dashboard
- Retiring tools: replacement identified before announcement
- Migration timeline communicated to franchisees
- All playbook references updated before tool retirement

8 Playbook Maintenance

- Review triggered by: platform changes, new data, FDD updates
- Changes documented in version log (what, when, why)
- Updates communicated via 2+ channels
- Communication covers: what changed, why, what to do differently
- Major updates: dedicated webinar or training session held
- Field coaches confirm franchisees have implemented changes
- New franchisees briefed on version history at onboarding