IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

General Session

IFA INTERNATIONAL FRANCHISE ASSOCIATION

IFA26 EMERGING

NASHVILLE, TN | NOVEMBER 16-18



Dustin Hansen, CFE

President & Global Board Member,
The Back Nine Golf

iFA INTERNATIONAL FRANCHISE ASSOCIATION

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

Emerging Franchisor Award

INTERNATIONAL FRANCHISE ASSOCIATION

IFA26 EMERGING

NASHVILLE, TN | NOVEMBER 16-18



Sam Ballas, CFE

CEO & Co-Founder, East Coast Wings + Grill / Sammy's Sliders; Chair, IFA Board of Directors

iFA INTERNATIONAL FRANCHISE ASSOCIATION

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

Emerging Franchisor Award

INTERNATIONAL FRANCHISE ASSOCIATION



CONSUMER FUSION

IFA26 EMERGING

iFA INTERNATIONAL FRANCHISE ASSOCIATION

Emerging Franchisor Award

And the winner is.....

scenthound®

cerca

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18



The Bravest Man in Franchising: Rebuilding Trust and Transforming School of Rock

Rob Price
CEO, Youth Enrichment Brands
(Former CEO, School of Rock)

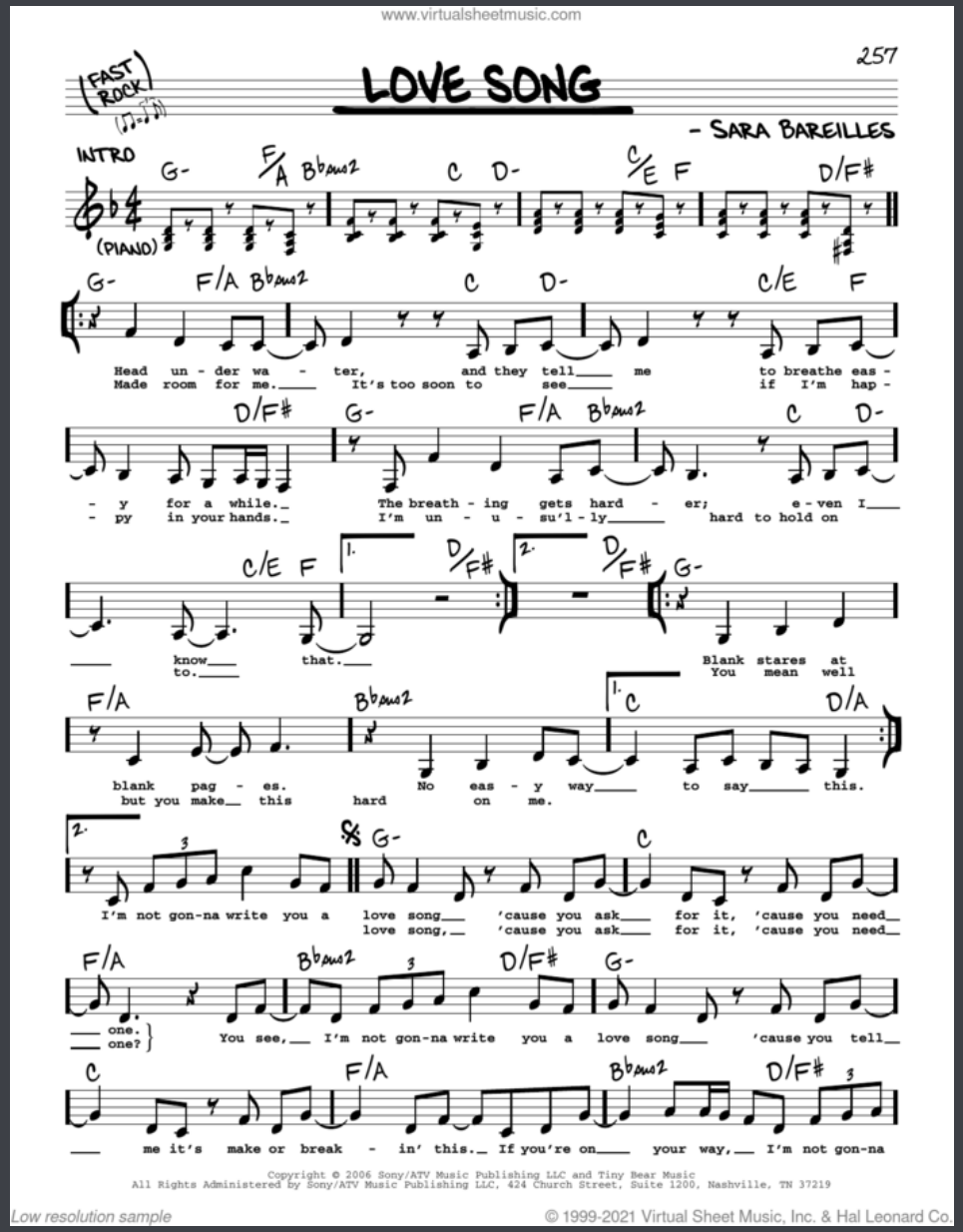
iFA INTERNATIONAL FRANCHISE ASSOCIATION








YOUTH
ENRICHMENT
BRANDS
SM
i9 SPORTS
US SPORTS CAMPS
SCHOOL of ROCK
EURO SPORTS CAMPS
U.S. BASEBALL ACADEMY
SAFESPLASH SWIM SCHOOL
K·E CAMPS
NBC CAMPS
SPORTS CAMPS CAN



MELODY

HARMONY

DISSONANCE


MELODY


FRIENDS
KEYBOARD
MODE
SCHOOL of ROCK

THIS IS



Youth Enrichment Brands builds communities where children discover confidence, resilience, and joy.

NOW

A generation is in crisis. Childhoods once rich with human connection are now tethered to phones and filtered through screens. Hours once filled with play, activity, and self-discovery are consumed by lonely scrolls, taps, and clicks.

Nearly half of teens now report feeling persistently sad. Surging depression and anxiety have unleashed devastating levels of self-harm and suicide. The epidemic of isolation steals children's self-confidence, innocence, and sense of belonging.

US

Youth Enrichment Brands confronts these forces by building communities where children discover confidence, resilience, and joy.

- ✓ We believe individual growth is maximized when kids are immersed in passionate **communities** since life is a team sport.
- ✓ We believe **confidence** requires competence honed by courage, curiosity, and constructive risk-taking.
- ✓ We believe **resilience** helps kids harness societal and technological changes, versus being devoured by them.
- ✓ We believe kids' achievements are most meaningful when they are **joyful**.

THIS IS

Youth Enrichment Brands builds communities where children discover confidence, resilience, and joy.

GENERATION REAL PROJECT

Rebuilding **real-world childhood** through operational programs, expert partnerships, and practical resources for families

Expert Advisors



Erica Komisar, LCSW



Jennifer Breheny Wallace

Resources

Reading List



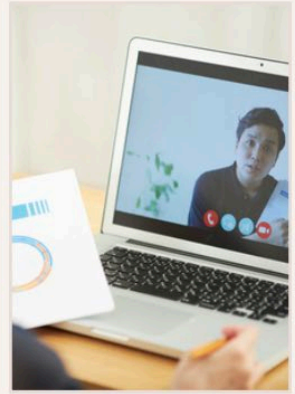
Activity Finder



Playbook



Webinar Series

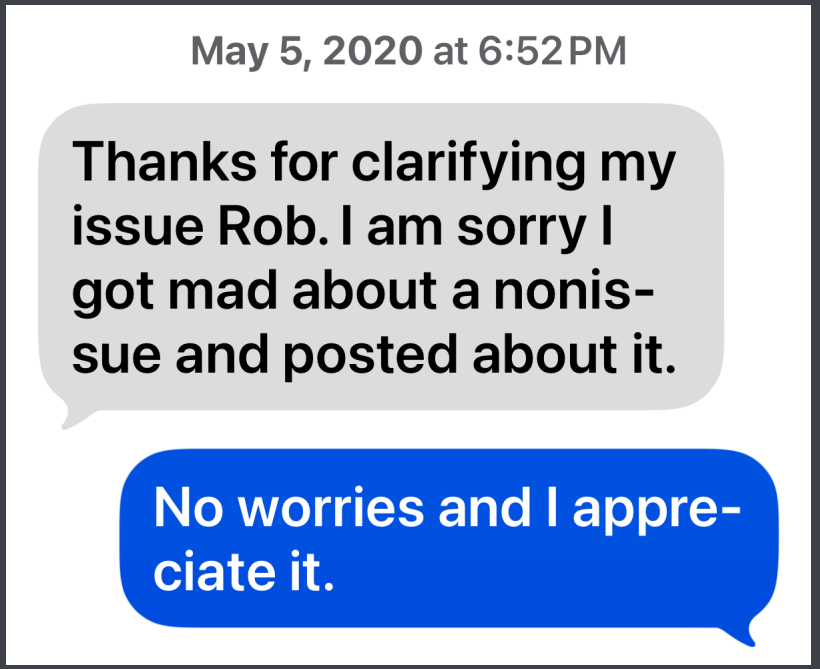


HARMONY

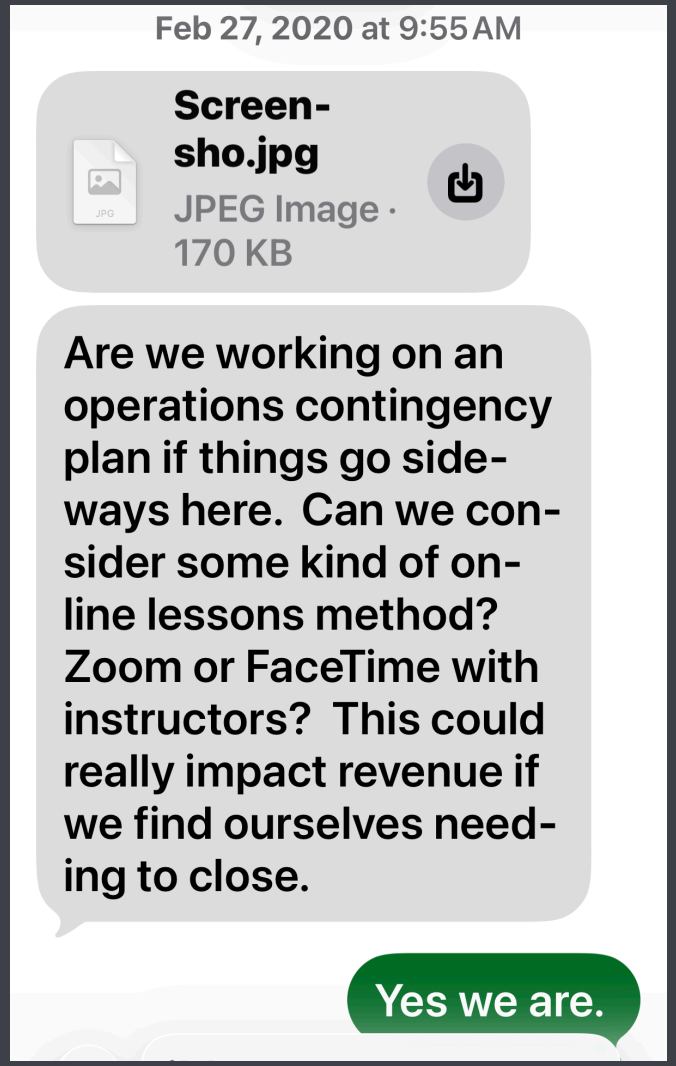



Pearl
SCHOOL OF ROCK

No disparaging franchisees



Maybe they're right!





is different than

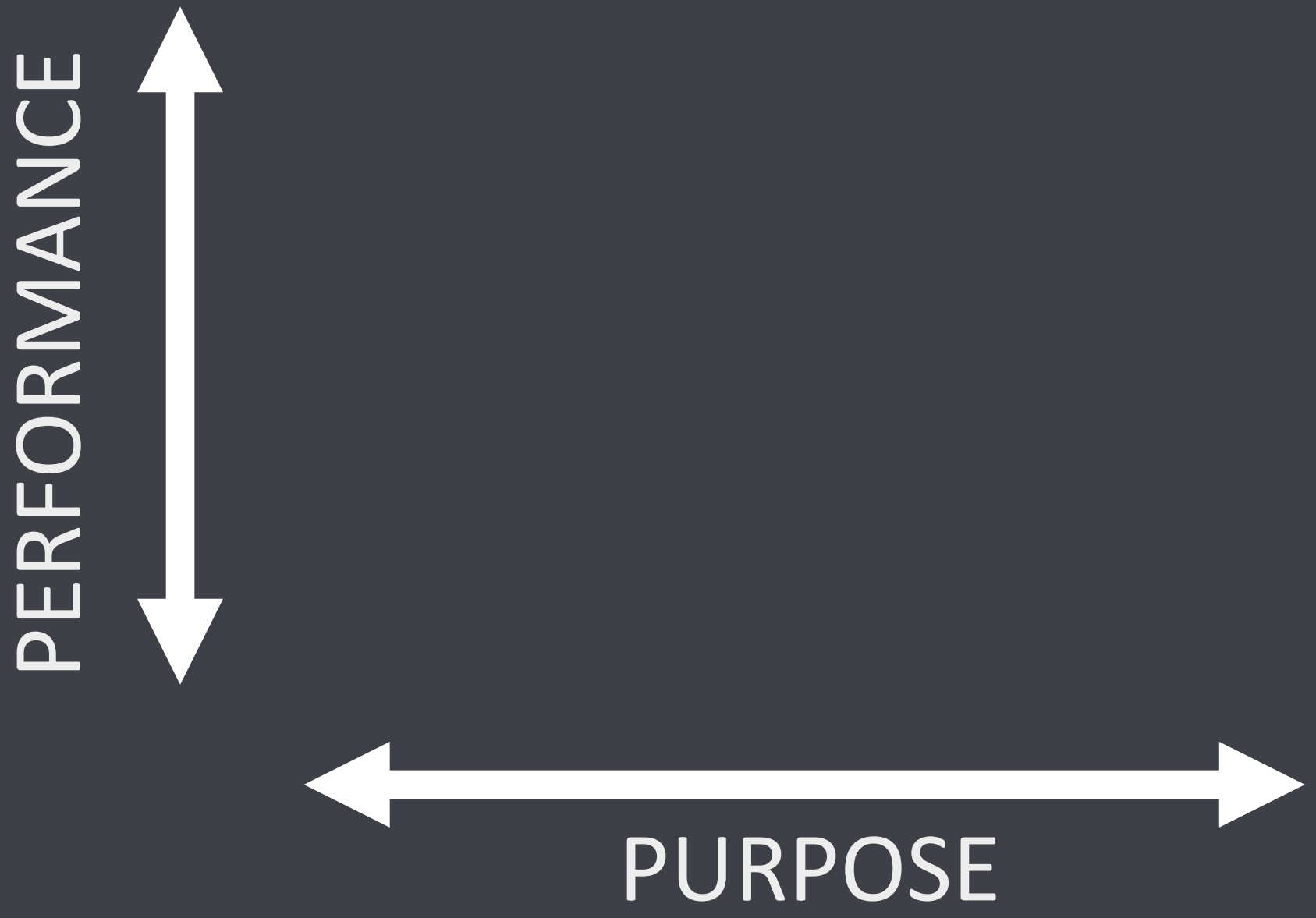


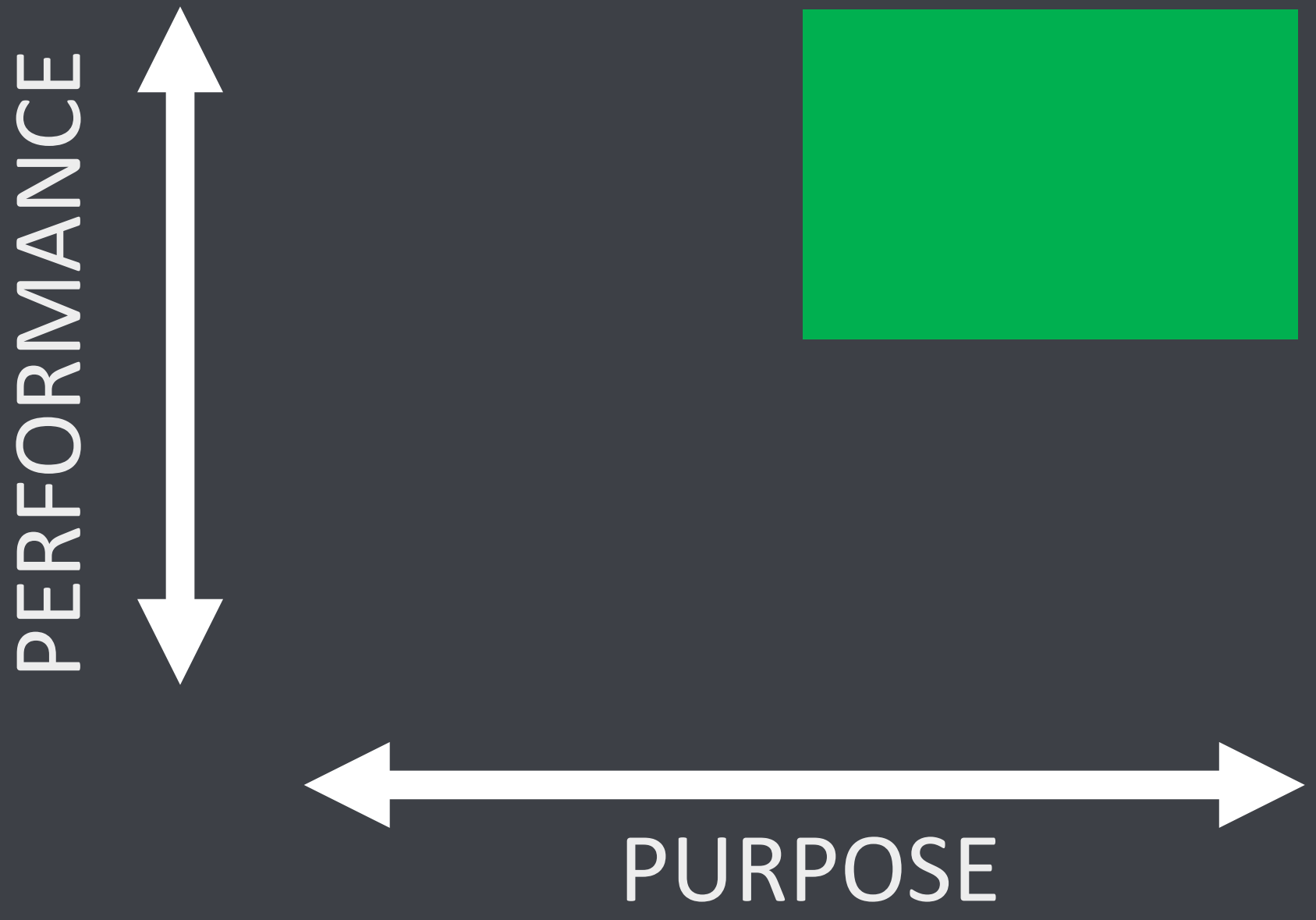

DISSONANCE

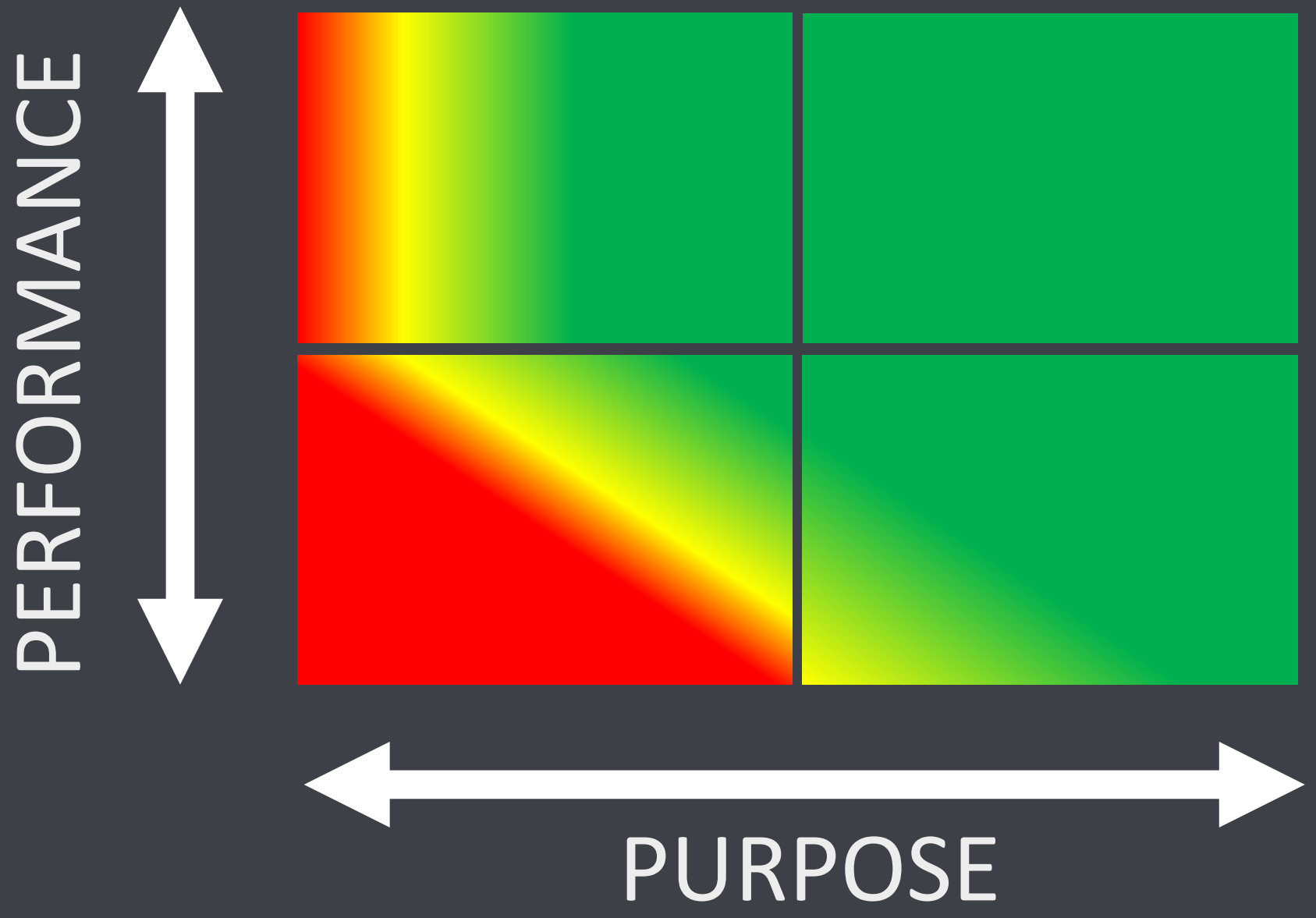

SCHOOL of ROCK

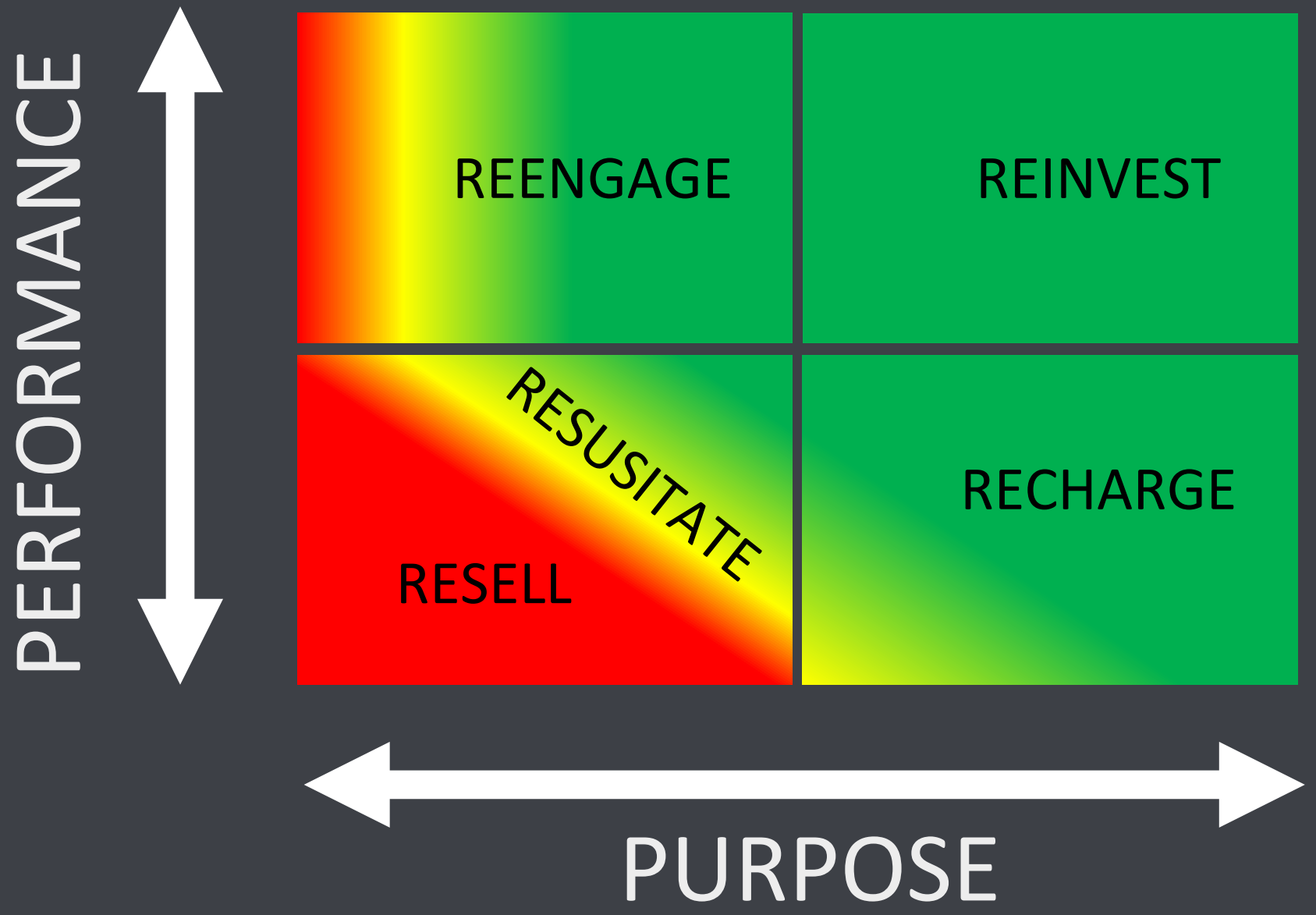
PERFORMANCE

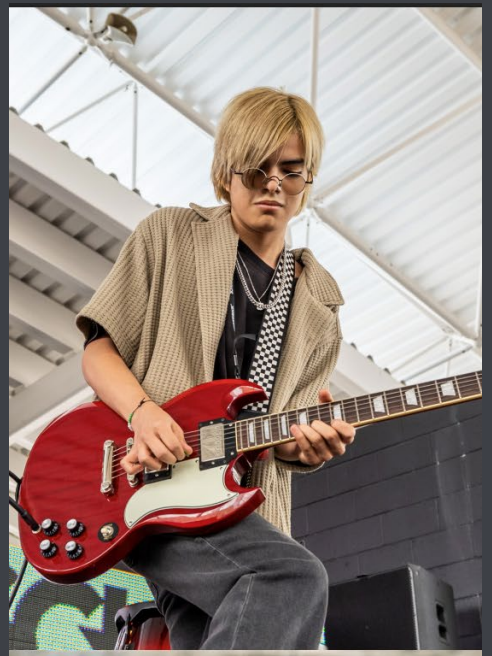



PERFORMANCE
PURPOSE


PERFORMANCE
PURPOSE


PERFORMANCE
PURPOSE


PERFORMANCE
REENGAGE
REINVEST
RESUSITATE
RESELL
RECHARGE
PURPOSE



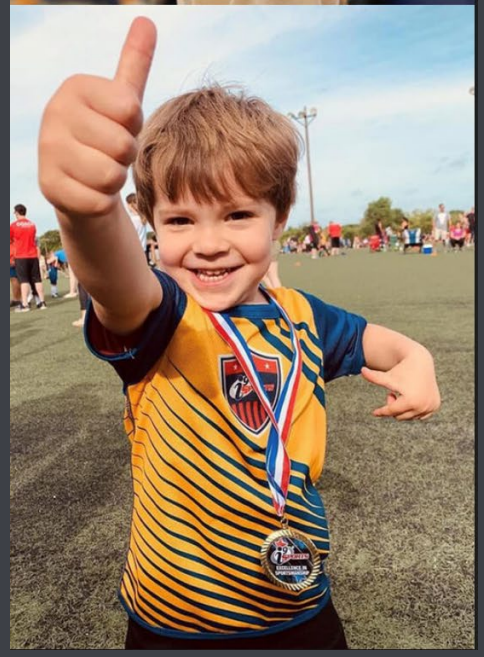






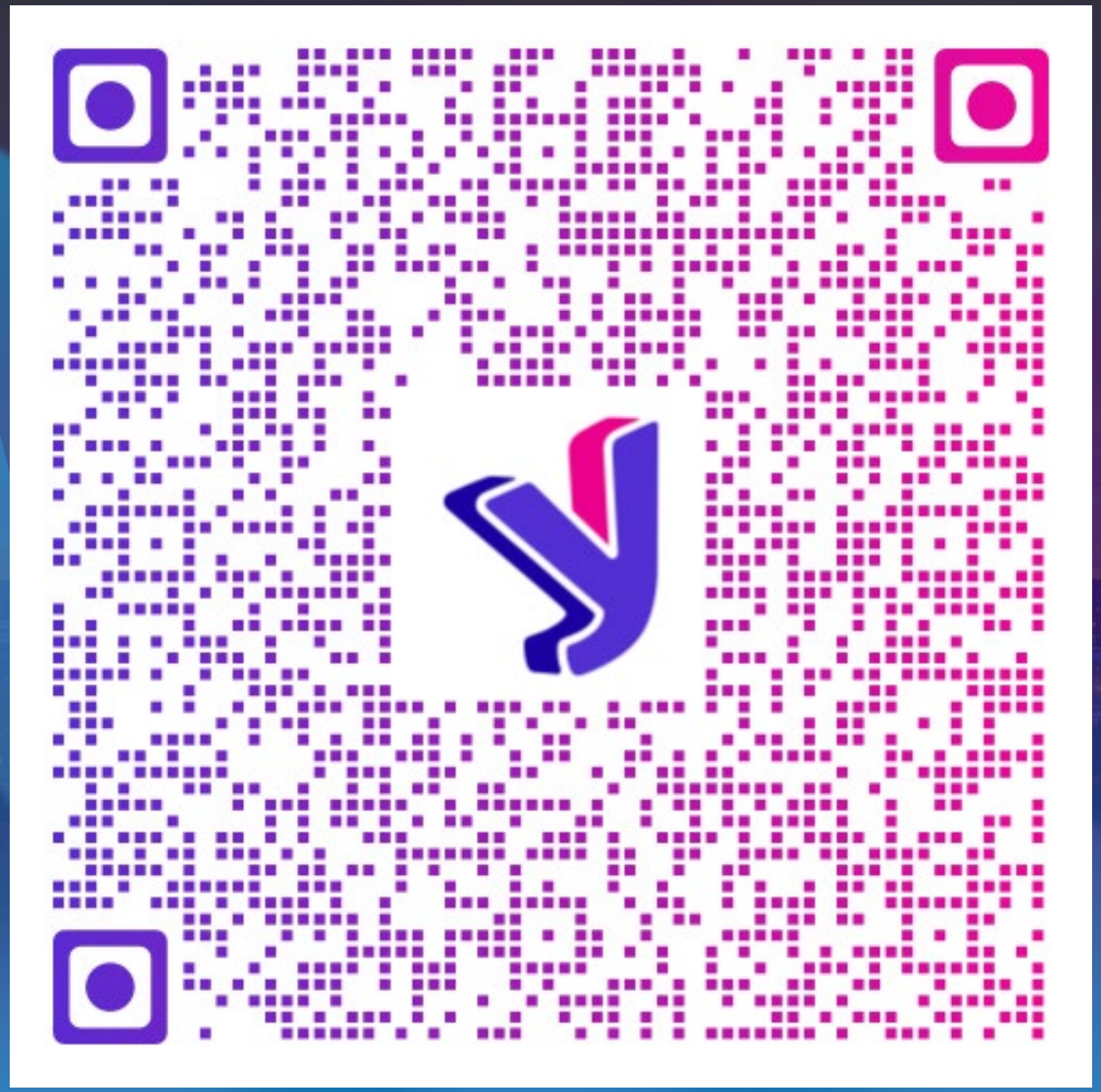






IFA26 EMERGING

NASHVILLE, TN | NOVEMBER 16-18



iFA INTERNATIONAL FRANCHISE ASSOCIATION

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18





The Answers Are in the Room

Moderator:
Dustin Hansen, CFE
President & Global Board Member, The Back Nine Golf

Speakers:
Carolyn Thurston, CFE
Founder/CEO, Wisdom Senior Care;

TBA Attendee Speakers

iFA INTERNATIONAL FRANCHISE ASSOCIATION

Top Three Priorities

- Franchise development and finding qualified franchisees.
- Marketing, brand awareness, and sales consistency.
- Scaling operations and improving franchisee performance.

Top Three Priorities

- Franchise development and finding qualified franchisees.
- Marketing, brand awareness, and sales consistency.
- Scaling operations and improving franchisee performance.


IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18
iFA
INTERNATIONAL
FRANCHISE
ASSOCIATION

What's Up Next?

This Morning

9:00 am – 9:30 am	Networking Break with Tabletop Sponsors – *Riverbend Ballroom*
9:30 am – 10:30 am	Concurrent Sessions by Stage of Growth & 1:1 IFA Board Member Meetings **Stages 1 & 2: Tech Stack Triage: What to Implement at 10, 50, and 100 Units** *(Sponsored by Cinch) - Meadow Ballroom D* **All Stages: Unit Economics & Returns: Essential to Validation & Sustainability** *(Sponsored by Qvinci Software) -Willow Pond ABC* **Stages 1 & 2: Beyond Founder Marketing: Creating a Brand Franchisees Can Grow** *(Sponsored by V Digital Services) - Willow Pond DE* **1:1 IFA Board Member Meetings** – *Meadow Ballroom ABC*
10:40 am – 11:40 am	Roundtable Topic Discussions with Sponsors – *Meadow Ballroom ABC*


IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18
iFA
INTERNATIONAL
FRANCHISE
ASSOCIATION

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

Roundtable Topic Discussions

iFA INTERNATIONAL FRANCHISE ASSOCIATION

Round 1

Table #	Company	Facilitator Name	Topic
1	Accounting Office, The	Tim Johnston	Building a Financial Support System for New Franchisees: What You Need to Know
2	AnswerConnect	Karen Booze	Turning Every Call Into an Opportunity: Improving Lead Capture Across a Franchise System
3	Artesian CPA	Craig Denlinger	Building Controls to Effectively Oversee and Audit Franchisee Financials
4	Benetrends Financial	Allison Galvan	One Size Doesn't Fit All: Building the Right Funding Strategy
5	Business Finance Depot	Marisol Cruz	Alternative Financing Integration: Expanding Initial Franchisee Funding Beyond Traditional Lending
6	CareerPlug	Josh Coleman	What Franchisors Should Measure Before a Staffing Problem Becomes a Performance Problem
7	Cheng Cohen LLC	Vincent Frantz	While Intriguing, Don't Give on These Rights to Get the First Few Sales
8	ConstantContact	Thomas Nettesheim	Balancing Brand Control and Local Stories: Empowering Franchisees Without Losing Brand Identity
9	Delightree	Ifiok Umoh	What to Systemize and What to Leave Alone
10	Discovered	Fletcher Wimbush	Making Hiring Part of the Franchise Sales Process
11	Enspire for Enterprise	Michele Brevig	Beyond Leads: Are Your Franchisees Actually Getting Customers?
12	FranFast by Fast Cloud	Rogelio Martinez	Less Busywork, More Time to Lead: Practical AI for Emerging Franchisors
13	Hibu	Sarah Pahl	Multi-Channel LEad Tracking & Why It Matters
14	HolaTeams	Ziad Dalal	From 5 to 50 Locations: How to Scale Your Franchise Without Scaling Complexity
15	iFranchise Group/TopFire Media/FranDev Co	Todd Houghton	Scaling Intelligently
16	Internicola Law Firm	Brian Lincer	Franchise Sales Compliance: Avoiding Common Mistakes that Put Franchise Systems at Risk
17	Katalyst Group	Carl Udler	Sold the Franchise. Now How Do You Get It Open Faster?
18	Marketing 360	Luke Barnes	The AI Search Shift - From Google to AI Chat: Is your Franchise Visible in the New Search Landscape?
19	Nixon Peabody	Keri McWilliams	Item 19 Without Regret: Building Financial Performance Representations That Support Growth and Reduce Risk
20	Operandio	David Rigbye	AI in Operations: Your Next Team Member Isn't Human
21	Prestige Franchise Partners	Samantha Schweitzer	Do You Need More Leads, or Do You Need a Better Sales Engine?
22	Qvinci	Aaron Proulx	How to Build a Royalty Process that Scales
23	SMB Franchise Advisors	Dawn Abbamondi	Finding Your First Franchisees with Organic Lead Gen Tactics - What's Working Now
24	Spadea Lignana Franchise Attorneys	Tom Spadea	Dealing with Non-Compliant Franchisees
25	Top2Bottom Business Solutions	Gretchen Johnson	The Item 19 Goldmine: Using Clean Unit Data to Accelerate Franchise Sales
26	UniFi Books	Lexi Correll	Scaling Without the Cleanup: Financial Habits for Growing Brands
27	V Digital Services	Kenny Stocker	Brand Website vs Local Website: How Do You Get Visibility at the Local Level for a New Location?
28	Vonigo / Full Steam	Matt Work	What Does a Successful Franchisee Look Like — and How Do You Replicate It?

Round 2

Table #	Company	Facilitator Name	Topic
1	ARC	Joe Ruzic	Brand Consistency at Scale: What Breaks as Signage, Graphics, and Locations Multiply?
2	BBSI	Kiley Hix	Help Your Franchisees Hire - Without Becoming their Employer
3	Cassels	Frank Robinson	Mistakes That Cost Franchisors Later
4	Cerca	Olivier Pires Bajaluna	Communication Is Not Engagement: How to Get Franchisees Truly Involved
5	Ceterus	Bill Jones	Beyond the Average: Benchmarking That Actually Changes Behavior
6	Cinch	Michael Critchfield	Location 5 vs. Location 50: Keeping the Customer Experience Consistent as You Grow
7	Citrin Cooperman	John Danza	Financial Mistakes Emerging Franchisors Make
8	Consumer Fusion	Xan Gulish	SEO to GEO - How Franchise Brands Win Local Discovery in AI Search
9	Cozee AI	Tim Johnson	Building Your Technology Stack: Avoiding Costly Tech Mistakes as You Scale
10	DesignCoup	Billy Mitchell	Where You Lose Your Next Regular: Why Customers Don't Come Back
11	Endereza Law	Elena Villasenor Sulluvan	Does Your FDD Reflect Reality? Franchisees Buy What's Written, Not What You Envision
12	Entrepreneur's Source / FranchiseSource	Gregory M. Cook	Stop Chasing Leads. Start Finding the Right Franchise Owners.
13	Franchise Fastlane	Heather Harris	Are You Actually Ready to Scale? The Honest Discussion Emerging Franchisors Must Have
14	FranLift	Deora Pollock	Franchise Lead Sources: What's Working, What Doesn't, and What's Worth the Investment?
15	Greenberg Traurig	Alexander G. Tuneski	Setting the Right Foundations for Franchise Growth: Documents, Manuals, and Systems that Scale
16	Jakiro	Dane Jordan	AI in a Franchise System: Where It Actually Helps Today, and Where It's Hype
17	Kaemark	Josh Droegemueller	Picking the Right Construction Partner - Open on Time, Know the Cost, and Build it to Last
18	Key HR	Alicia Costoya	Navigating Multi-State HR Compliance and Risk Management for Growing Brands
19	Location 3	Alex Porter	Found From Opening Day: Getting New Locations Visible on Google, Maps, and AI
20	Profitkeeper	Emily Tarnstrom	Overcoming Resistance to Financial Transparency
21	Pryze	Natalia Micheletti	Beyond the Numbers: Frontline Employee Behaviors That Drive Franchise Profitability
22	Thryv	Matthew Gourgeot	Emerging Brand Marketing Best Practices
23	VideoSpan	Michael Abramowitz	Brand Consistency vs. Local Authenticity: How Do You Scale Both?
24	Zoho Corporation	Ali Shabdar	Getting Reliable Data from Your Franchisees Before You Scale

Count Down Clock

https://www.online-stopwatch.com/full-screen-stopwatch/

What's Up Next?

11:50 am – 12:50 pm	Concurrent Sessions by Stage of Growth **All Stages: The Founder Ceiling — When Your Greatest Strength Becomes Your Biggest Risk** *(Sponsored by Discovered)* *Meadow Ballroom D* **Stage 2 - 4: Don't Just Plant Flags, Build Markets: Where to Grow, When to Invest, and Why it Matters** *Willow Pond ABC*
1:00 pm - 2:20 pm	C-Suite "FRANHACK" Problem Solving Roundtables - *Meadow Ballroom ABC*


IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18
iFA
INTERNATIONAL
FRANCHISE
ASSOCIATION


CareerPlug

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

"Franhack" Problem Solving Roundtables

INTERNATIONAL FRANCHISE ASSOCIATION

THE RFE OVERVIEW

- You will have 8 people in a group - each of you will have your own time with the group and are required to come up with a succinct problem statement : “How to ….
- Each person has about 7 1/2 total minutes of time with the group.
- It will be important that you are listening and providing input to all the attendees.

RFE Agenda	Presenter role	Advisor/ Peer role	Comments
PRESENTER Set the context 1.5 Min	• Context of Problem stated by the Participant	• Complete questions of clarification **Each round:** • **Assign a timekeeper.** o Person to the left of presenter (not advisor) • **Assign a note taker** o Person to the right of the presenter (not advisor)	• Questions of clarification are meant to make sure all understand the issue in order to give relevant, experiential feedback for the RFE. • Careful of cloaked questions such as "*Have you considered?*" vs. a clarifying question ..."*Can you explain what X means?*"
RFE 5 Mins GO Around to all participants	• States the problem wanting input on – • "I would like input on ***How to*** ..." in • Then they get experiences and input from peers and advisors	• Clarify the exact RFE / problem participants want hacked and then the advisors facilitate, along with peers from his/her experience first. • Peer/ advisor approach: • Use "In my experience...here is what happened...here is what I learned" • Do not use "You should..." or "why don't you..."	• Presenter listens to comments (not an argument or debate on the Peer's experience) • **CRISP feedback from peers advisors**: • Peer/advisor must differentiate feedback coming from experience vs. coming from the creative space (if that has been allowed). Creative space should be allowed, just defined as such. • Presenter can ask questions of clarification, but not debate the value of the feedback. • It is not intended to be a loose brainstorming session. The goal is targeted, relevant feedback and options based in experience.
Validation & Take away 1 Min	• Presenter validates what he/she heard • Presenter states one actionable take away from the RFE	• Peer responds back to Presenter letting the Presenter know if the Peer was heard correctly & fully	• This exchange is much more of an effective validation of listening rather than a debate of facts

Count Down Clock

https://www.online-stopwatch.com/full-screen-stopwatch/

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

"Franhack" Problem Solving Roundtables Wrap Up

iFA INTERNATIONAL FRANCHISE ASSOCIATION

What's Up Next?

This Afternoon

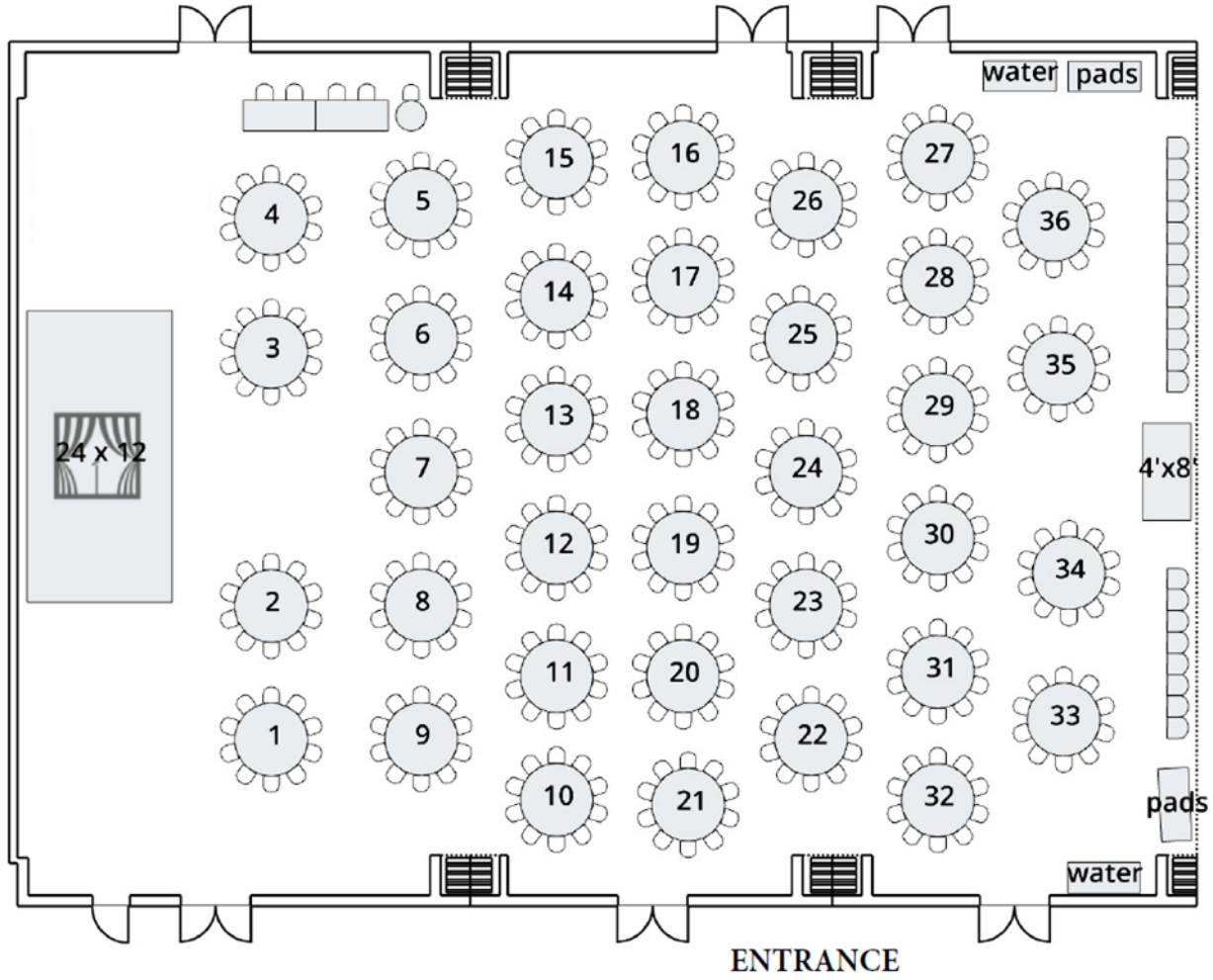
2:30 pm – 3:30 pm	Concurrent Sessions by Stage of Growth & 1:1 IFA Board Member Meetings **All Stages: Build Culture Before It Builds Itself** *(Sponsored by Operandio)* *Willow Pond ABC* **Stage 1 & 2: Right Role, Right Window: Reading Your Org Before You Hire** *(Sponsored by KeyHR)* *Meadow Ballroom D* **Stage 3 & 4: Financial Infrastructure / Benchmarking / KPI's** *Willow Pond DE* **1:1 IFA Board Member Meetings** – *Meadow Ballroom ABC*
3:30 pm – 4:00 pm	Networking Break with Tabletop Sponsors *Riverbend Ballroom*

Back in General Session Room: *Meadow ABC*

4:00 pm – 4:30 pm	Business Solution Roundtable Discussions
4:30 pm – 5:30 pm	General Session: **The AI-Powered Franchisor: Inside Their Playbook**


IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18
iFA
INTERNATIONAL
FRANCHISE
ASSOCIATION

BSR Round Tables



	Company Name	Industry Type
1	Artesian CPA	Accountants
2	DesignCoup	Advertising/Design
3	V Digital Services	Advertising/Design
4	Videospan	Advertising/Design
5	The Internicola Law Firm, P.C.	Attorneys
6	Cinch	Business Products/Systems
7	Qvinci	Business Products/Systems
8	AnswerConnect	Call Center/Answering Services
9	Delightree	Computer Software/Internet Services
10	Discovered	Computer Software/Internet Services
11	Franfast by Fast Cloud	Computer Software/Internet Services
12	HolaTeams	Computer Software/Internet Services
13	Jakiro	Computer Software/Internet Services
14	Operandio	Computer Software/Internet Services
15	SERV	Computer Software/Internet Services
16	Business Finance Depot	Financial Services
17	Franchise Capital Solutions	Financial Services
18	UniFi	Financial Services
19	Franchise Fastlane	Franchise Consulting
20	SMB Franchise Advisors	Franchise Consulting
21	The Entrpreneur's Source	Franchise Consulting
22	ADP	Human Resources
23	BBSI	Human Resources
24	Key HR	Human Resources
25	Paychex	Human Resources
26	Pryze	Human Resources
27	ActiveCampaign	Marketing/Public Relations
28	Consumer Fusion	Marketing/Public Relations
29	Hibu	Marketing/Public Relations
30	Marketing 360	Marketing/Public Relations
31	ARC	Printing

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

Business Solution Roundtables

INTERNATIONAL FRANCHISE ASSOCIATION

And the winner is.....

Congratulations! You won an engraved bottle of wine!

Michael Readdy, Belfour

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18

General Session

IFA INTERNATIONAL FRANCHISE ASSOCIATION

And the winner is……

Congratulations! You won a $1000 and a Gucci wallet!

Bridgette Wolff, Doodlebugs



JAKIRO

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18



The AI-Powered Franchisor: Inside Their Playbook

Cheryl Baldwin, CFE
Director of Marketing & Communications, WSI

Valerie Brown-Dufour
President, WSI

Michael Monaghan, CFE
VP of Field Operations, WSI

iFA INTERNATIONAL FRANCHISE ASSOCIATION

IFA26
EMERGING
NASHVILLE, TN | NOVEMBER. 17-19

The AI-Powered Franchisor

Inside the WSI Playbook

Valerie Brown-Dufour · Cheryl Baldwin · Mike Monaghan

iFA INTERNATIONAL FRANCHISE ASSOCIATION

WHO WE ARE

Three areas of expertise. One real-world playbook

WSI | Embrace Digital. Stay Human.

Valerie Brown-Dufour
President

Leadership and organizational readiness

Cheryl Baldwin
Marketing & Communications

Franchise development and marketing

Mike Monaghan
Field Operations

Franchisee coaching and support

More than 30 years adapting to digital change

WHAT WE'LL BE COVERING TODAY

Opening the WSI AI playbook

01

Think bigger

VALERIE

Culture, context and where to start

02

Operate smarter

CHERYL & MIKE

Franchise development	Cheryl
Franchisee support	Mike
Marketing	Cheryl

03

Grow differently

VALERIE

Budget, org design and strategic decisions

What we built, what worked, what didn't, and a toolkit you can take home.

Does this sound like you?



THE CHALLENGES OF GROWING

- ○ A small corporate team where everyone wears multiple hats
- ○ Franchisee expectations growing faster than your resources
- ○ Pressure to grow without dramatically increasing overhead

AND NOW, THE ADDED CHALLENGE OF AI

- ○ AI is moving so quickly, it’s hard to know where to focus
- ○ Lots of AI ideas, but no clear owner, budget or roadmap
- ○ You’ve tried AI, but the results feel generic and don’t understand your business

We’ve wrestled with these challenges too.

The opportunity isn’t just automation

EFFICIENCY

Do existing work faster.

CAPABILITY

Do work you could never resource before.

What could your organization do if capacity were no longer the constraint?

Create a culture of experimentation

Make AI legitimate · Make learning visible · Make it part of the work

01 Share what works

Team conversations, AI show-and-tells and network sessions

02 Build community

AI Leadership Committee and shared tools and skills

03 Recognize innovation

Celebrate experimentation and share what people learn

04 Make it operational

AI capability in hiring and AI-related quarterly Rocks

Experiment freely, but not carelessly.

Context is foundational and critical

THE SAME QUESTION

“How do I help a struggling franchisee improve?”

GENERIC AI

Coach more. Review the plan. Improve local marketing.

AI + YOUR CONTEXT

Business plan · Performance · Coaching history · Goals · Commitments

Picks up where the last three coaching calls left off.

Start small: organize knowledge you already generate in one place.

Where AI is already changing how we operate

01

Think bigger

VALERIE

Culture, context and where to start

02

Operate smarter

CHERYL & MIKE

Franchise development	Cheryl
Franchisee support	Mike
Marketing	Cheryl

03

Grow differently

VALERIE

Budget, org design and strategic decisions

Franchise Development

FD is your first revenue line, so we start here.

IFA26 EMERGING

iFA INTERNATIONAL FRANCHISE ASSOCIATION

FD CHALLENGE 1 OF 3

Are we reaching leads before they cool off?

You paid for that lead. Every hour it waits, it’s worth a little less.

1 **OUR CHALLENGE**

Our leads were growing fast. Our salesperson was spending hours dialing and leaving voicemails just to book first calls, and new leads waited while she did.

2 **WHERE AI HELPED US**

We put an AI voice agent at the front of the process. It calls every new lead within minutes, answers their questions and books the serious ones into our salesperson’s calendar.



Sandy

Spends more of her time with serious candidates

Every growing brand hits this point: hire another person or find another way.

WHAT CHANGED FOR US

New leads now hear from us within minutes

3.6 days → ½ day

from new lead to
booked discovery call

15–20 hrs

a week of Sandy's time moved
from chasing first calls to selling

WE GAINED **Momentum**

WHAT WE LEARNED

1. **Tell them it's AI**
   And that the call is recorded. Up front, every time.
2. **It qualifies better than we did**
   The same qualifying questions, on every call.
3. **People liked it**
   Callers tried to stump it. It held up. They even complimented it.



Hear a real call
About 50 seconds

FD CHALLENGE 2 OF 3

How do we know a candidate is ready for the next step?

The spending doesn't stop once a lead comes in. Every sales step costs time or money.

1 OUR CHALLENGE

We have an early qualifying step that includes our PCQ and a review call. But deciding who was ready came down to gut feel, so about 90% got our mailed package.

2 WHERE AI HELPED US

We wrote down our fit criteria. Now AI checks every review call against them, the same way every time, and recommends whether a candidate gets our mailed package or a digital one.



Trinda

Spends her time selling, not second-guessing who's ready

Ours: a mailed package. Yours: Discovery Day, a flight, or hours of sales time.

WHAT CHANGED FOR US

Every candidate now moves forward on the same criteria

100%

of PCQ review calls are reviewed against the same fit criteria

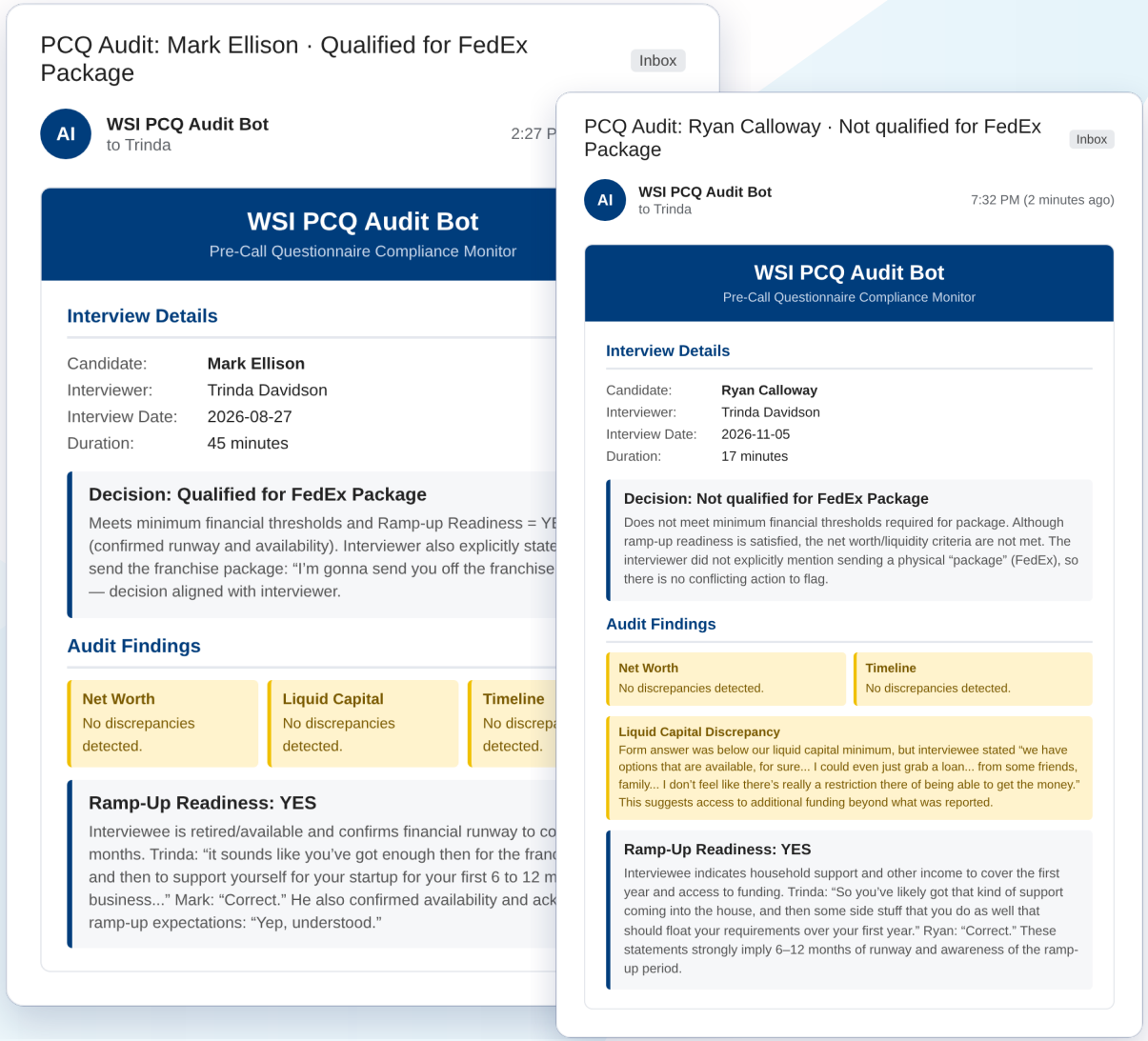
9 in 10 → 7 in 10

candidates who now get the mailed package

Under half → nearly 2 in 3

of mailed-package candidates now go on to a package review call

WE GAINED **Consistency**



FD CHALLENGE 3 OF 3

Are we helping our sales team get better at selling?

When you're busy selling, there's rarely time to step back and get better at it.

1 **OUR CHALLENGE**

Our sales lead works his own leads and coaches the team. He'd gladly listen back to every call and give feedback, but there aren't enough hours in the day. And our market keeps changing.

2 **WHERE AI HELPED US**

We built a sales coaching skill right into our CRM. Anyone on the team can run it on a single call or a candidate's whole journey and get coaching in minutes.



Daniel

Can coach his team without stepping away from selling

Ours: a sales lead with a team to coach. Yours: maybe just you, selling on your own.

WHAT IT GIVES US

Every salesperson now has a coach inside our CRM

1 It sees the whole journey

Months of calls, emails and notes, reviewed in minutes.

2 It spots what we missed

A candidate who withdrew had asked in her first email if she'd have to be the main salesperson forever. We answered it and moved on.

3 It tells you what to say

TRY SAYING

"Here's what's on hold, what we can do now, and when I'll update you, even if nothing changes."

4 It learns from wins too

On a deal we closed, it showed us what worked: a written recap after every call, with dates and next steps. Something for us to repeat.

Runs inside our CRM. We created you a skill you can use as your FD sales coach.

WE GAINED **Perspective**

Other ways we're leveraging AI to keep the funnel full

Ads, brokers, portals, PR, your website. However you fill your funnel, AI can help.

1. **Smarter spend**
   An AI skill built from expert ad training tells us what to pause, fix or test with our campaigns.
2. **Sharper ads**
   Feedback on copy, messaging and visuals before we launch.
3. **Faster first drafts**
   FD pages, emails and posts, checked against our ideal candidate persona.
4. **More video, less filming**
   Digital-double avatars help us make video for our candidate database.
5. **Quiet leads, re-engaged**
   A CRM agent reviews what we know about each lead and drafts a personal email. We approve it and it goes out.



Amreeta
Lead gen strategy, not spreadsheets



Rupinder
Content strategy, not first drafts

Four things to try before your next lead comes in



Speed to lead

Check how long your last 10 leads waited for a first reply. Over a day? Start there.



Qualifying candidates

Find your most expensive sales step. Ask AI what qualification check should go in front of it and how it can help you qualify fit.



Sales coaching

Pick one candidate you lost. Give AI your notes and call transcripts, with names removed. Ask what you missed and what to say next time.





Quiet leads

Pick one lead who went quiet. Give AI your notes and what they showed interest in. Ask for a personal check-in email you'd actually send.

Every one of these is a ready-to-use prompt or skill in our AI-Powered Franchisor Toolkit.

Franchisee Support

How we're using AI to help us deliver better support

IFA26 EMERGING

iFA INTERNATIONAL FRANCHISE ASSOCIATION

Four Questions

01 HANDOFF

What happens to everything we learned in FD?

02 COACHING

How do we coach more franchisees without more coaches?

03 SALES SKILLS

Who coaches the sales calls we can't join?

04 SUPPORT

Why do we keep answering the same question?

What happens to everything we learned in FD?

How it used to work

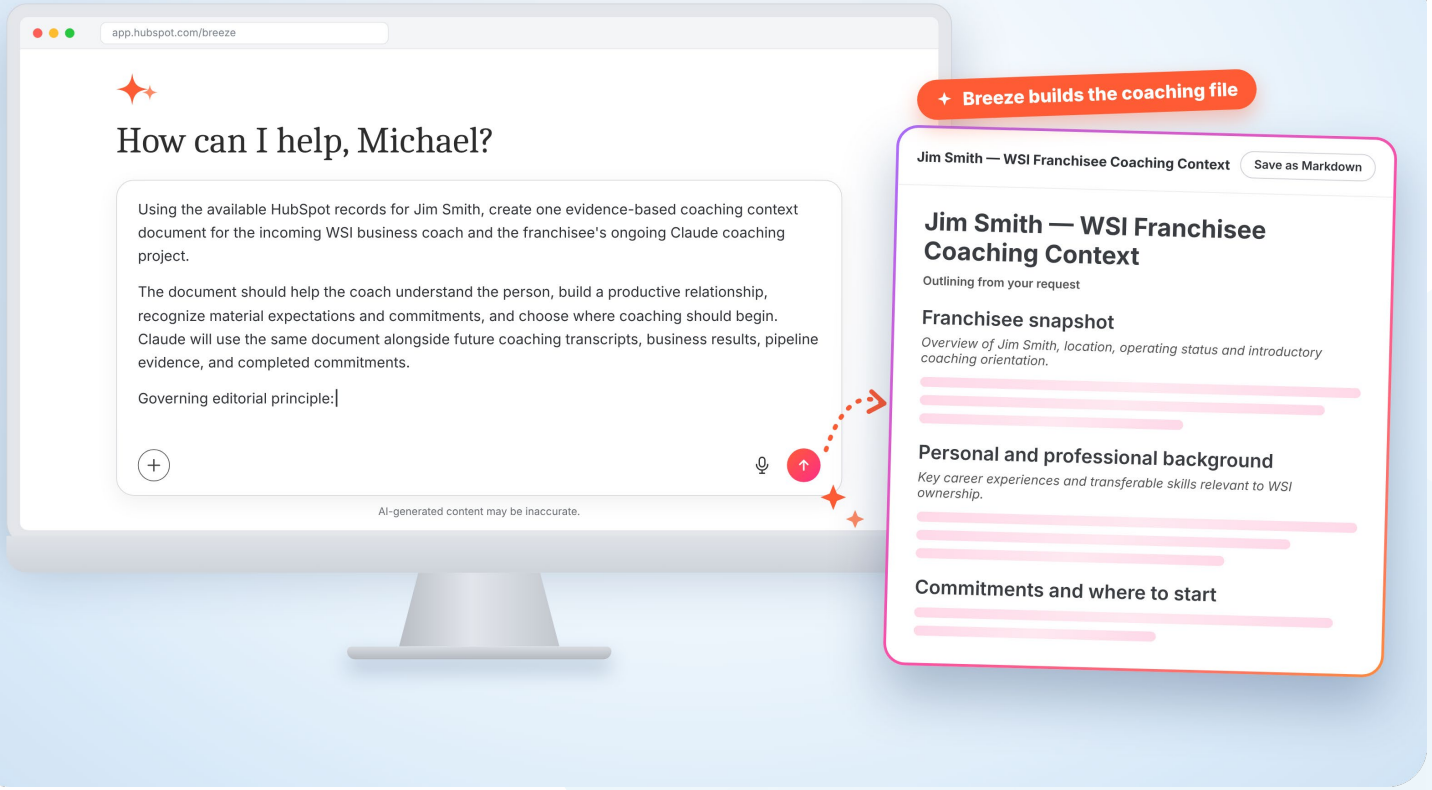
- Sales and ops blocked time to review each new franchisee
- We hoped everyone took good notes
- Months of conversations shrank to what people remembered
- The coach started close to scratch, and the franchisee retold their story

What AI reads for us now

- Recorded FD calls
- Emails with the candidate
- Questionnaire and resume
- Behavioral assessment
- CRM notes and deal history

One coaching context package

One prompt pulls it all together

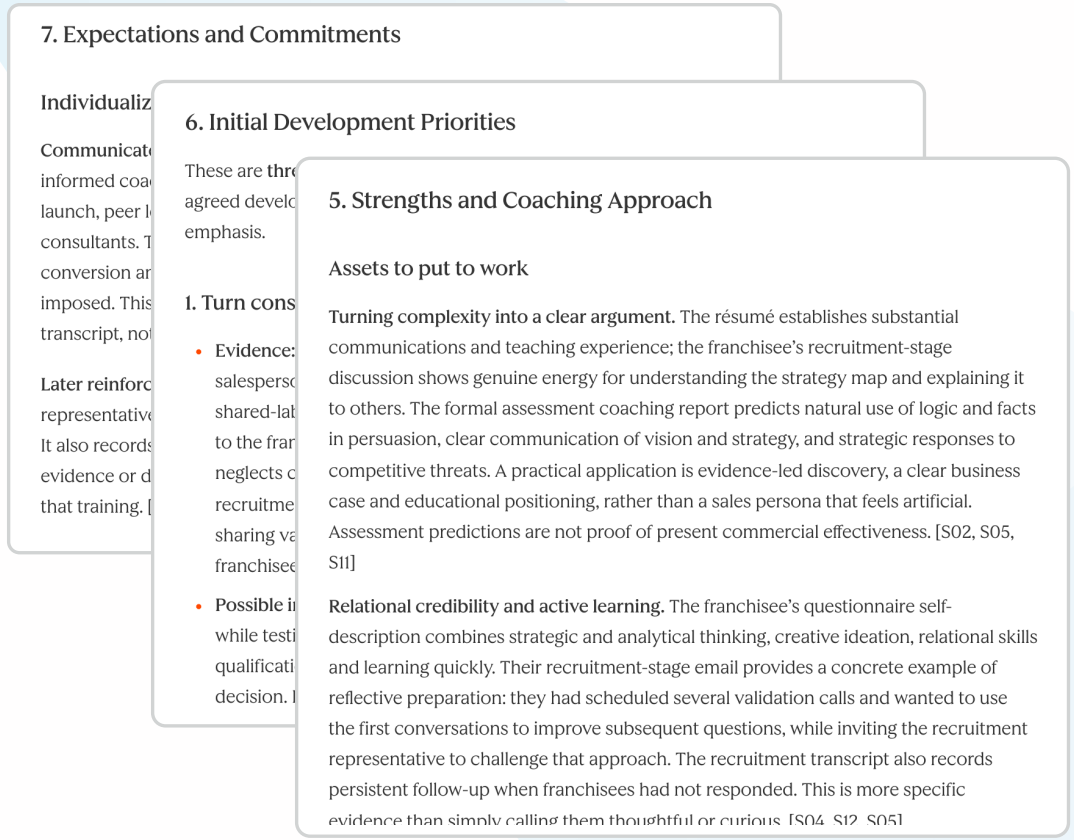


WHAT IT PULLS INTO ONE DOCUMENT

- Why they bought and how they define success
- Goals and expectations
- Strengths and development areas
- What the assessment suggests
- Every commitment made in FD

No AI in your CRM? Check whether it can connect to a tool like Claude.

What the coach walks in with



WHAT'S IN THE CONTEXT PACKAGE

1. Franchisee snapshot
2. Background and experience
3. Motivation and definition of success
4. Business plans and operating intentions
5. **Strengths and coaching approach**
6. **Initial development priorities**
7. **Expectations and commitments**
8. First coaching conversation
9. Sources and what's missing
10. Guidance for ongoing use

Every line labeled as fact, their own words, or interpretation.

How do we coach more without more coaches?

- FD context package
- Coaching call transcripts
- Emails
- Their plan and goals

One place per franchisee

Their own AI project

SO THE COACH CAN

- **Prep in minutes**
- **Spot trends**
- **Feedback on your coaching**
- **Coach handoffs that lose nothing**

Have established AI guardrails as an organization

Prep and follow-up: from 30 minutes to 5

1 BEFORE ~~30 min~~ → 5 min

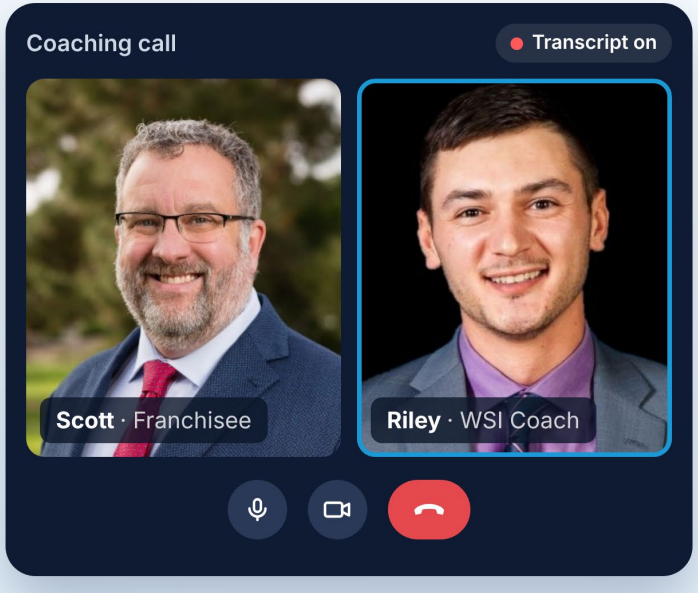
AI preps the brief

Brief for Scott

- What changed
- Open commitments
- Questions to ask

Riley walks in prepared

2 THE CALL



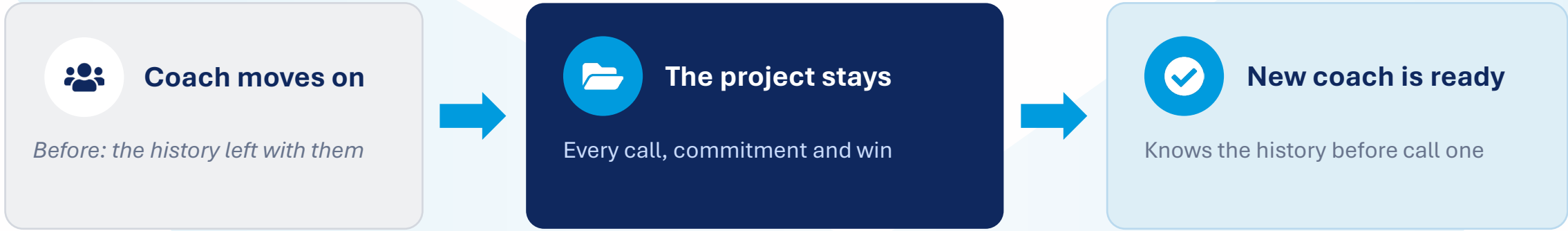
3 AFTER ~~30 min~~ → 5 min

- Reads the transcript — AI
- Updates Scott's context file — AI
- Drafts the follow-up email — AI
- Riley reviews and sends — COACH

CONNECTED TO Email · Drive · Calendar · Transcripts · Scheduled tasks

Every call and email feeds the next brief, **not last week's notes**

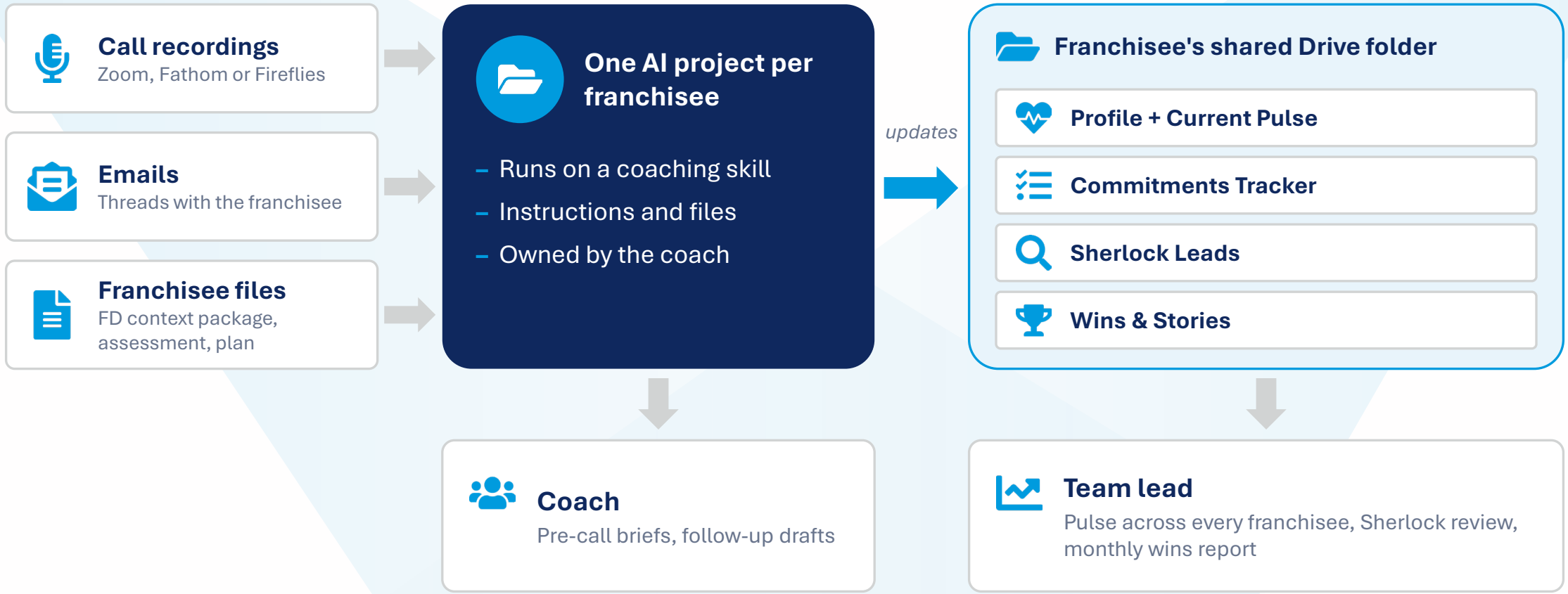
When a coach changes, the history stays



THE HANDOFF BRIEF

- Where the business stands
- Open commitments
- What the last coach was working on
- What works with this franchisee
- Three questions for the first call

Phase 2: how we run it across a coaching team



Understand Patterns in Your System

ASK IT FOR

- **“Pulse on [franchisee]”** Status and what changed
- **“Team pulse”** Everyone, sorted at risk first
- **“Coach view”** Caseload patterns before a 1:1
- **“Sherlock review”** The 1 to 3 ideas worth testing next
- **“Wins report”** Stories for FD, with permission status

Team pulse *Sample*

Franchisee A	At risk	Two commitments overdue, pipeline down
Franchisee B	On track	Prospecting goal in track
Franchisee C	Watch	Priorities shifting, metrics flat
Franchisee D	Watch	Carried a commitment forward twice
Franchisee E	On track	First retainer signed

Spot risk while it's fixable **Sharper coach one-on-ones** **Step in only when needed**

Testing and building now: an AI coach between sessions

Augments our coaches. Doesn't replace them.

Daily check-in

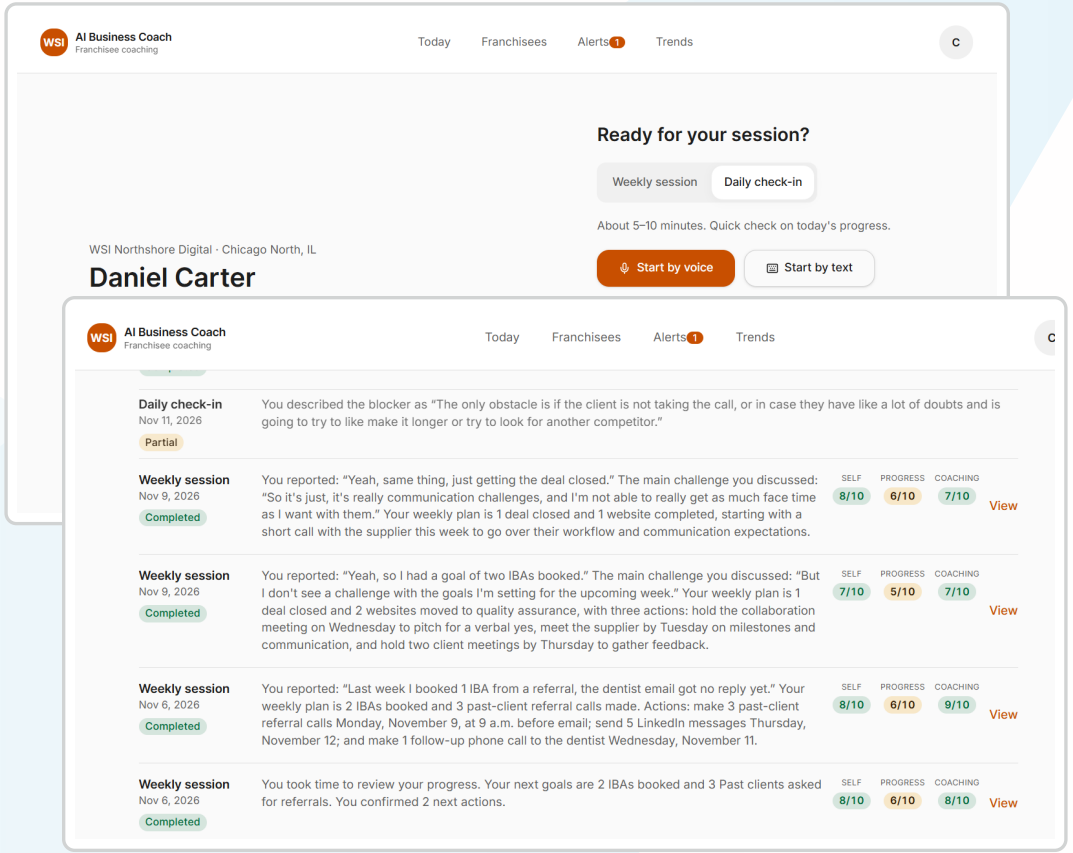
5 to 10 minutes on today's progress

Weekly session

A fuller session between coaching calls

- Our finger on the pulse between calls
- More accountability, for those who want it
- Real-time feedback on what they're working on

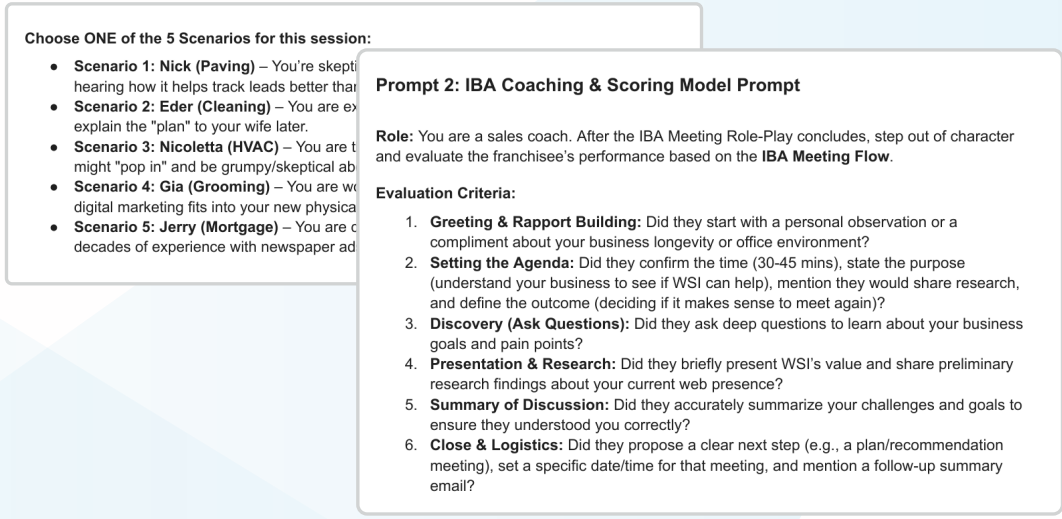
Status: final testing, then a pilot with a handful of franchisees



Who coaches the sales calls we can't join?

1. **Pick a scenario**
   Five realistic prospects
2. **Run the meeting by voice**
   ChatGPT's voice mode. Claude works too
3. **Get coached and scored**
   Six parts of the meeting flow, 1 to 5
4. **Run it again**
   No waiting for a coach

FROM OUR ROLE-PLAY AND COACHING PROMPTS



Choose ONE of the 5 Scenarios for this session:

- **Scenario 1: Nick (Paving)** – You're skepti
  hearing how it helps track leads better thar
- **Scenario 2: Eder (Cleaning)** – You are ex
  explain the "plan" to your wife later.
- **Scenario 3: Nicoletta (HVAC)** – You are t
  might "pop in" and be grumpy/skeptical ab
- **Scenario 4: Gia (Grooming)** – You are wo
  digital marketing fits into your new physica
- **Scenario 5: Jerry (Mortgage)** – You are c
  decades of experience with newspaper ad

Prompt 2: IBA Coaching & Scoring Model Prompt

Role: You are a sales coach. After the IBA Meeting Role-Play concludes, step out of character and evaluate the franchisee's performance based on the **IBA Meeting Flow**.

Evaluation Criteria:

1. **Greeting & Rapport Building:** Did they start with a personal observation or a compliment about your business longevity or office environment?
2. **Setting the Agenda:** Did they confirm the time (30-45 mins), state the purpose (understand your business to see if WSI can help), mention they would share research, and define the outcome (deciding if it makes sense to meet again)?
3. **Discovery (Ask Questions):** Did they ask deep questions to learn about your business goals and pain points?
4. **Presentation & Research:** Did they briefly present WSI's value and share preliminary research findings about your current web presence?
5. **Summary of Discussion:** Did they accurately summarize your challenges and goals to ensure they understood you correctly?
6. **Close & Logistics:** Did they propose a clear next step (e.g., a plan/recommendation meeting), set a specific date/time for that meeting, and mention a follow-up summary email?

> *"It gave me such awesome feedback that I was like, can we do that again? ... I did better the second time.*
>
> **Brian** | October class

> *"The tone, it was kind of very hesitant, just like a prospect would be... it also recommended some stuff that I had not been thinking of.*
>
> **Mario** | July class

Coaching on real calls: watch the game tape

Record the meeting
Video calls and in-person meetings

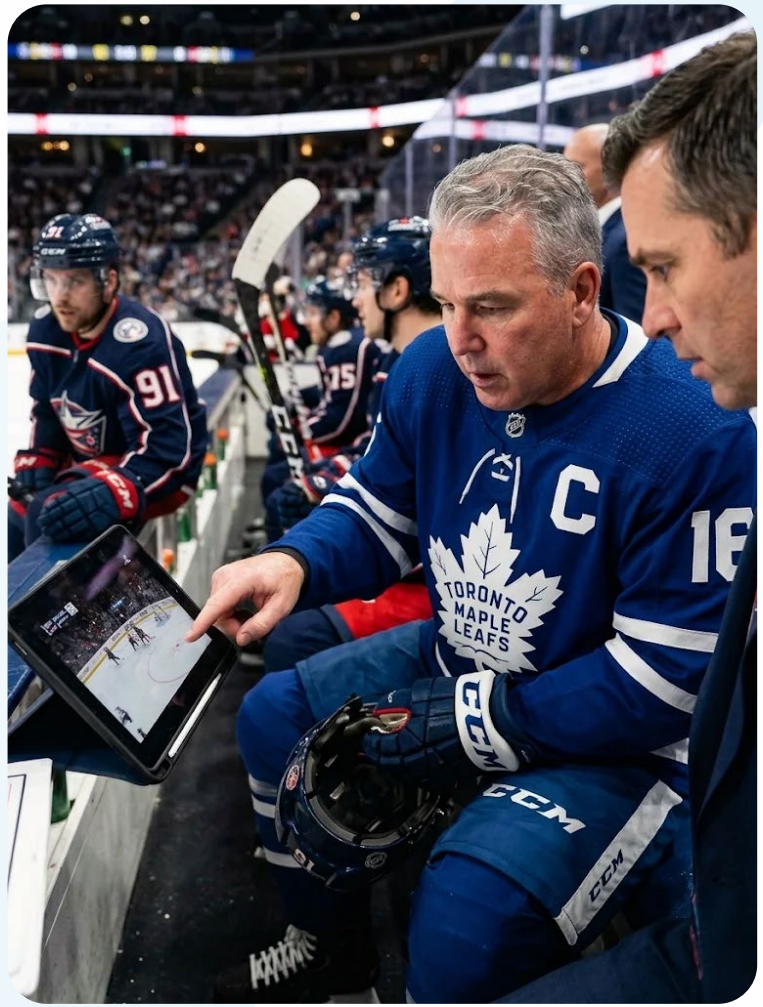
AI reviews it
Against the same scoring rubric as the role-plays

Feedback right away
What worked, what to fix, what to try next

Coach goes deeper
No more rewatching every recording first

Why record everything?

- **Better solutions:** the client's exact words
- **Better performance:** review your calls like game film



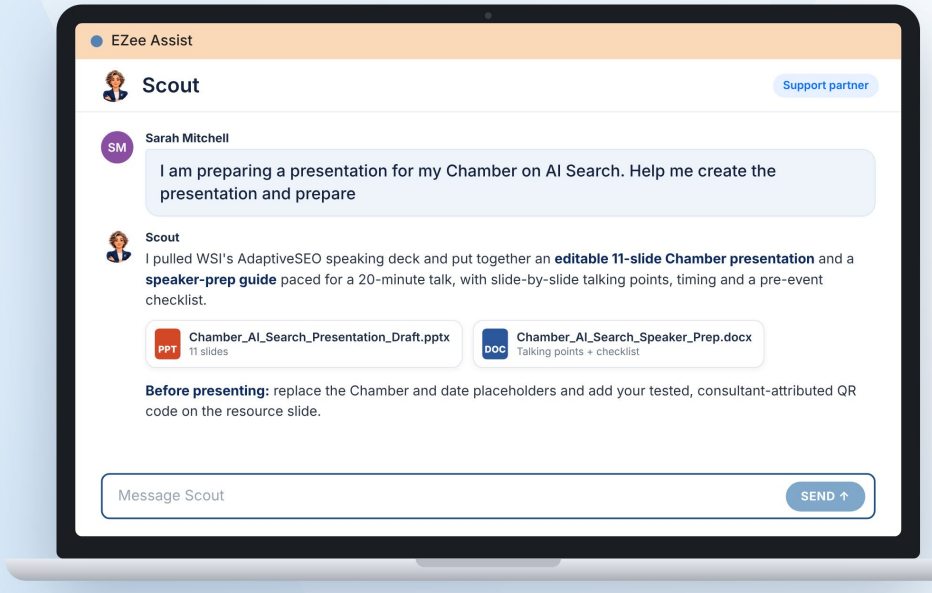
Why do we keep answering the same question?

91%

of franchisee questions answered without a person

Answers at 11 PM or 6 AM, not just during office hours

More than answers. A partner in every franchisee's business.





IFA26 EMERGING

iFA INTERNATIONAL FRANCHISE ASSOCIATION

Where to start: one home for your context



Pick one home

Even a shared Google folder. No intranet needed.



Start with two things

Your ops manual and an FAQ doc.



Get it out of heads

Nothing on one person's desktop.



Let calls feed it

Add the questions your calls keep surfacing.

ASK YOURSELF

Where does your ops manual live?

Is everything in the cloud?

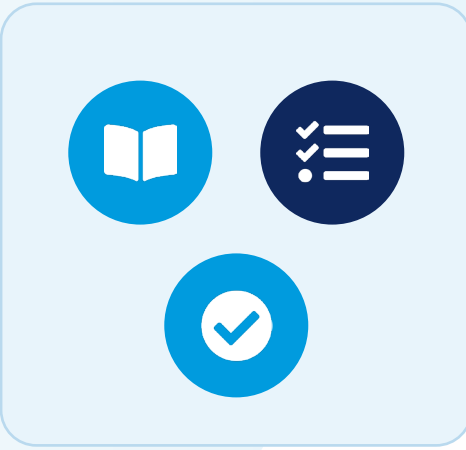
How much of your process is in someone's head?



Bonus: a few more ways we use AI in Operations







Case study harvester

Turns a recorded call into a one-page success story, in minutes

AI avatars in training

Training videos and walkthroughs, without a film crew

Curriculum and tests

Course content and certification tests, drafted with AI and reviewed by our team

Marketing

You and your franchisees will use AI.
Protect the brand before they do.

IFA26 EMERGING

iFA INTERNATIONAL FRANCHISE ASSOCIATION

AI doesn’t keep your franchise story and your customer story apart

WHAT WE TOLD FRANCHISE CANDIDATES

Low cost. Flexible. A fit for anyone leaving the workforce.

Meant to reassure career changers

WHAT OUR CLIENTS NEED TO BELIEVE

Our consultants are experienced experts who can guide their business.

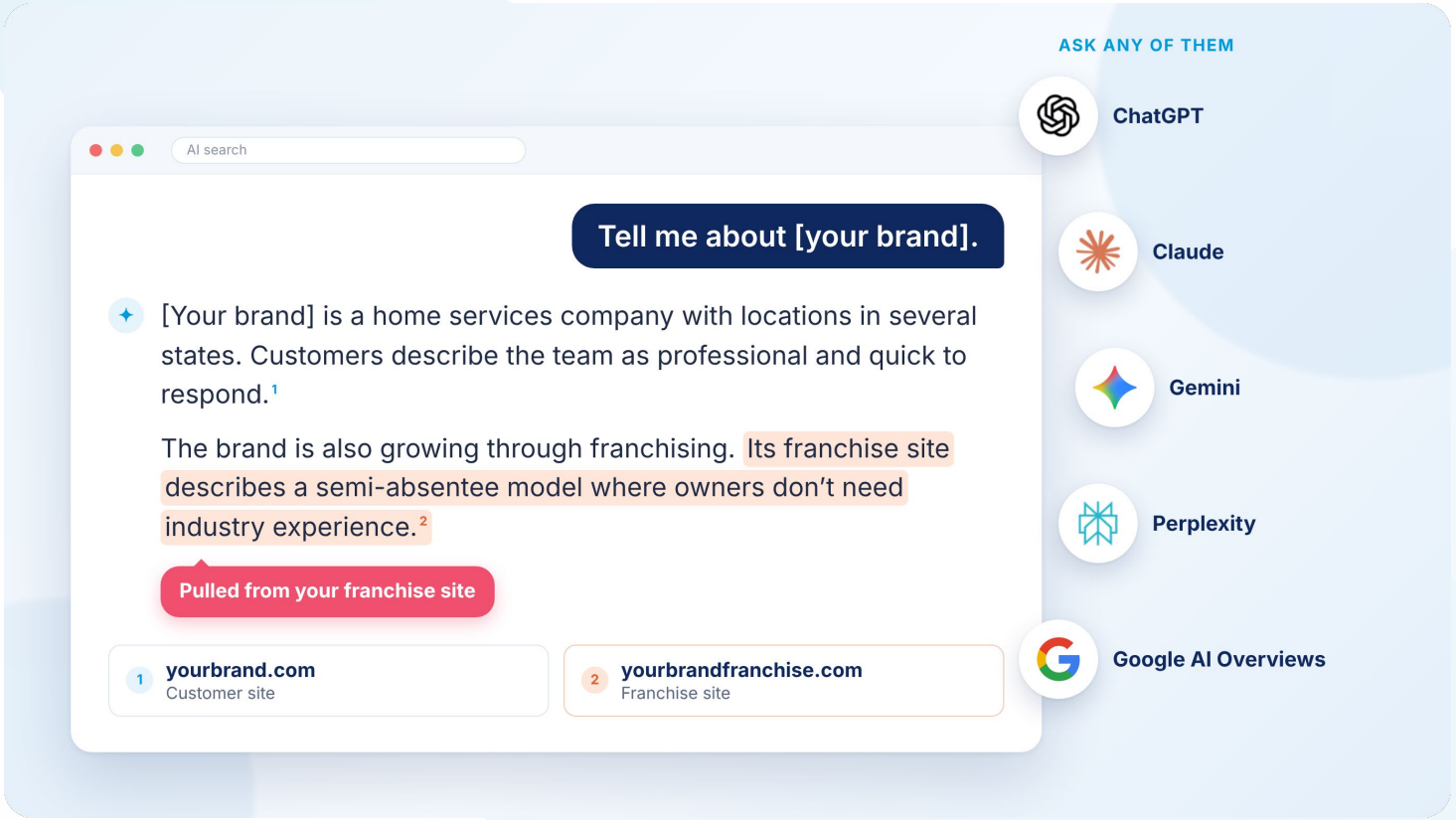
Trusted to lead strategy, not learn on the job



What you promise franchise candidates can quietly undercut what you promise customers.

AI SEARCH · TRY THIS

Find out what AI already says about you



ASK ONE SIMPLE QUESTION

- "Tell me about [brand]. What do they do, and who are they for?"
- **Then ask:** "What sources did you use?"

Then look closely. Is it mixing your franchise and customer stories? What's wrong or out of date?

Go deeper: ask again as a customer, then as a franchise candidate. Compare the two answers.

AI slop is what you get when AI doesn't know your brand

about-me.md

Client brand

WHAT'S INSIDE

- Who we are and how we sound
- What we always say
- What we never say

BUILD IT FROM

Brand guidelines, about page, content you're proud of

my-company.md

Client strategy

WHAT'S INSIDE

- What we sell
- Who buys each service
- What we say no to

BUILD IT FROM

Service pages, persona research, strategy docs

franchise-development.md

Franchise opportunity

WHAT'S INSIDE

- What an owner does
- Your ideal candidate
- What you can and can't claim

BUILD IT FROM

FD materials, discovery day deck, prospect FAQs

Design system

How we look

WHAT'S INSIDE

- Logo, colors and fonts
- Slide and document templates
- Image library

BUILD IT FROM

Brand guidelines, your website URL, logo files, artwork

Share these two with your franchisees

They'll use AI anyway. Help them stay on brand.

The “never say” list does the most work

WSI about-me.md · excerpt

```
## Messaging Rules — What We Never Say

- “We Simplify the Internet” — retired tagline, do not use
- “25+ years” or “over 25 years” — it’s 30+
- Specific office or country counts — these change; use “global network”
- Any reference to franchise or franchise model — not client-facing language
- “Harness the power of AI” — generic and weak
- “In today’s fast-paced world…” — AI-sounding filler, never use
```

Retired language

Old taglines and stale numbers your locations still use.

Risky claims

Anything AI might say that you’d have to take back.

Where the audiences split

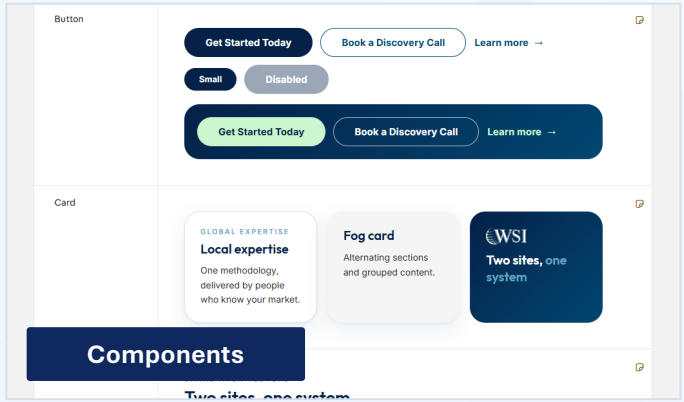
What stays out of client content and belongs in the FD file.

Our design system keeps us on brand









WHAT WE USE IT FOR

- Guides and ebooks for our franchisees
- Social images and covers
- Client materials our designer can finish

WHAT WE FED IT

- Our 16-page brand guidelines
- Logo files and original artwork
- Our websites

Start here: All you need is a $20 Claude account, your website URL and a one-pager with your logo, colors and fonts.

Three things you can do next week

01

Ask AI about your brand

Ask it to tell you about your brand, then ask what sources it used. Note what's wrong or mixed up.

02

Build your AI foundation

About-me, my-company, your FD file and your never-say list. Use the builder prompts in our toolkit and let AI interview you.

03

Share with your Zees

Give them your client-facing files. So, when they use AI, it sounds like your brand.



Consistency is cheap to set up at five units and hard to fix at five hundred.

INSIDE THE WSI PLAYBOOK

Grow differently

01

Think bigger

VALERIE

Culture, context and where to start

02

Operate smarter

CHERYL & MIKE

Franchise development	Cheryl
Franchisee support	Mike
Marketing	Cheryl

03

Grow differently

VALERIE

Budget, org design and strategic decisions

Put money behind it

Make AI a deliberate priority, not an extracurricular activity



TIME

Room for experimentation



TALENT

Training and new capabilities



TOOLS

Subscriptions and small pilots



“Some of what you fund won’t work. That’s part of the budget too.”

Rethinking the org chart

If you designed your organization today, would you draw the same chart?



The goal isn't to replace people. It's to rethink where work belongs.

A boardroom at your fingertips

What if you could call on great strategic minds whenever you face a tough decision?



CM — Catherine Monson
Franchise leadership, execution and growth

GN — Greg Nathan
Franchise relationships, trust and network dynamics

DM — Dan Monaghan
Franchise strategy, innovation and digital change

PS — Peter Senge
Systems thinking and learning organizations

Simulated perspectives, not actual advice or endorsements

The point is to challenge assumptions, not manufacture consensus.

Use AI to challenge a leadership decision, not simply answer a question

My AI board

Should we open a new territory, or strengthen our existing franchise network first?

“Debate this. Challenge each other. Tell me what I might be overlooking.”

Your question could be a new state, region or city.

WHAT TO LISTEN FOR

THE GROWTH CASE

A new territory adds reach and revenue while the opportunity is there.

THE EXECUTION CASE

Every new market pulls leadership time and support away from the franchisees you already have.

WHAT YOU MIGHT BE OVERLOOKING

Is your current network strong enough to be the proof that sells the next territory?

The value is in the debate, not the verdict.

TAKE IT HOME

Your AI-Powered Franchisor playbook and toolkit

Pick one or two things to put to work in your own system

FRANCHISE DEVELOPMENT

Speed-to-lead check
Candidate qualification prompt
FD sales call coach skill

FRANCHISEE SUPPORT

FD-to-coach handoff prompt
Coaching project setup
Case study harvester

MARKETING

about-me.md builder
my-company.md builder
franchise-development.md builder

LEADERSHIP

AI board setup guide
The AI-Powered Franchisor white paper

GET THE TOOLKIT

Scan to download

Prompts, skills and setup guides


IFA26
EMERGING
NASHVILLE, TN | NOVEMBER. 17-19
There is no finish line.
Build an organization that knows how to keep learning and adapting.
iFA INTERNATIONAL FRANCHISE ASSOCIATION

Thank you

WSI | Embrace Digital. Stay Human.

Val Brown-Dufour · Cheryl Baldwin · Mike Monaghan

GET THE TOOLKIT

Scan to download

Prompts, skills and setup guides


IFA26
EMERGING
NASHVILLE, TN | NOVEMBER 16-18
iFA
INTERNATIONAL
FRANCHISE
ASSOCIATION

IFA26 EMERGING

NASHVILLE, TN | NOVEMBER 16-18



Dustin Hansen, CFE

President & Global Board Member,
The Back Nine Golf

iFA INTERNATIONAL FRANCHISE ASSOCIATION

What's Up Next?

5:30pm – 6:30pm Reception with Tabletop Sponsors
Riverbend Ballroom

Tonight:

7:00pm – 9:00pm Sponsored Franchisor Dine Around
The Finch – Meet by the front desk at 6:45pm

Tomorrow:

8:00am – 9:00am Concurrent Breakout Sessions
9:00am – 9:45am Networking Break with Tabletop Sponsors
9:45am – 10:45am Concurrent Breakout Sessions & 1:1 IFA Board Member Meetings
11:00am – 12:00pm Closing General Session

And the winner is.....

Congratulations! You won a 3 day trip to Paris for you and your guest including flight and hotel!

Tucker Bedingfield, GALT Phranchise