

# Franchise update | 2012 Q3

BUSINESS INTELLIGENCE FOR GROWING FRANCHISORS

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*Know thyself:  
Dina Dwyer-Owens is  
her own best customer*

**Market!**

*3 Case Studies: Teaming  
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**Grow!**

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# From the editor's desk

BY KERRY PIPES

## Technology, Transparency, and Growth

**A**s I'm writing, I have just returned from the 2nd annual Franchise Consumer Marketing Conference in San Francisco. Hosted by Franchise Update Media Group, the event shows every sign of rocketing to success, just as its two elder siblings have—the Multi-Unit Franchisee Conference and the Leadership & Development Conference. I believe this flash of success is the result of the conference being in the right place at the right time. Consumer marketing tools, techniques, and strategies have never been more complex, yet more important to, franchise brands.

And I'm not just talking about social media. Consumer marketing has become a multi-faceted area filled with all kinds of technology tools to help customers find franchises and help franchises find customers—and just about everything in between. And, as those late-night TV marketers say, "But wait, there's more!"

Mapping and demographic tools, QR codes and POS scanning, local marketing, and emerging mobile payment solutions are just a few areas bursting on the technology scene. As several of the speakers and panelists noted at this year's conference, everything you think you know could be obsolete in a few months... or weeks.

It's an exciting time to be in franchising. With the economy rebounding and interest in franchising peaking again, more and more franchises are opting to lay their proverbial cards on the table. Transparency and open communication are key, say executives like Toppers Pizza's Scott Iversen and Quaker Steak & Lube's Marla Pieton

in this issue. Both are marketing executives who understand the importance and value of not only regular, clear communication, but also of being straightforward—and not over-communicating. That goes for existing franchisees as well as customers. Open, honest communication should be the rule in the store, online, and throughout all channels of the organization. Franchisees appreciate it—and respond to it—and it demonstrates to your customers that you care not only about creating great products and services, but also providing them in exactly the ways they want.

Of course no discussion of open and honest communication would be complete without mentioning franchise prospects. They want to know about you too. And that means much more than just an Item 19 or a clearly navigable website. If you want great franchisees who fit in well with your system and who are real bell-ringers, you must make sure that you are transparent and disclosure-minded with them. That's how Massage Envy's Lori Merrall and Nothing Bundt Cakes' Jenna Barber see it. In this issue, they discuss not only the importance of providing financial information and referrals to prospects and targeting them more effectively, but also of sharing key characteristics of your system and what makes someone successful with your brand.

Get personal. Provide your candidates with access to your executive team. And, while much of this can be executed with sophisticated technology tools, it's still hard to beat a good old-fashioned telephone call or face-to-face meeting. ■

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franchiseupdatemedia.com  
franchiseupdate.com  
franchising.com  
mufranchisee.com

Franchise UPDATE magazine is published  
four times annually.

Annual subscription rate is \$39.95 (U.S.)

For subscriptions email  
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or call (408) 997-7795

### FOR REPRINT INFORMATION CONTACT

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# Lead

Franchise leadership and management

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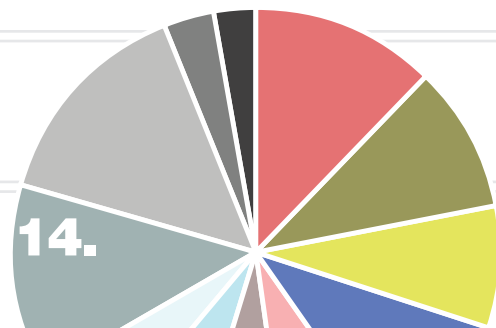
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**I found a real place in my role as chairwoman and CEO of The Dwyer Group. I didn't need to be a master plumber, but I did need to know how to lead a great team. And the female perspective has added an emotional touch to the way we approach business. As a wife, mother, and CEO, I can say that no one questions my ability to do my job. In fact, both women and men relate to me because I'm not afraid to be myself and show my emotions.**

— DINA DWYER-OWENS, CEO, THE DWYER GROUP



# CEO profile:



**Name:** Bob Johnston

**Title:** CEO, Chair

**Company:** Front Burner Brands, Inc.

**Brands:** The Melting Pot (144 in North America and 29 under development in Canada, Mexico, the Middle East, and Indonesia); Burger 21 (2 company stores, 2 more about to open, and 5 franchised locations licensed and in development); and GrillSmith, (6, all company owned)

**Age:** 48

**Family:** Wife Katina, children Megan and Thomas

**Years in franchising:** 27

**Years in current position:** President of The Melting Pot from 1985 until Jan. 2012 when I stepped into the CEO position for Front Burner Brands.

BY DEBBIE SELINSKY

## Respect for the Heart of the House

Teamwork and collaboration drive Bob Johnston at Front Burner Brands

Long Island native Bob Johnston says he did not exactly fall in love with franchising—or the restaurant business—from his vantage point as a dishwasher in his older brothers' Melting Pot restaurant in Tallahassee, Fla.

"My passion for the business didn't ignite until I was afforded the opportunity to provide service to guests. I put on a show for the guests and really became hooked," he says. "I have tremendous respect for the heart of the house of a restaurant. Without a great team, you have nothing to deliver."

Johnston continued to work his way through every position at the popular fondue restaurant, where his brothers, Mark and Mike, were early franchisees. In 1985, the three brothers combined resources and purchased The Melting Pot concept and its five restaurants. Twenty-seven years later, they have built the brand into 144 North American restaurants and have 29 international units under development.

In January, Johnston left his post as president of The Melting Pot to become CEO and chair of Tampa-based Front Burner Brands, whose concepts include The Melting Pot and two original brands: Burger 21, a fast casual restaurant tailor-made for franchising; and GrillSmith, a refined casual, open grill restaurant not currently being franchised.

The brothers opened their first Burger 21 in November 2010, a corporate store in Tampa. In September 2011 they launched a national franchising program, beginning with a focus on Florida and the East Coast. Their initial goal for 2012 was to have 30 franchise deals signed by year-end, one or two of them open, and two or three corporate stores open

in the Tampa Bay area.

Now in steady and careful growth mode, the leadership team at Front Burner are looking at different concepts, as well as the possibility of acquiring a small company, much the way they bought The Melting Pot.

Johnston, who describes his leadership style as collaborative and people-centric, continues to work closely with his brothers: Mark, chief concept officer and visionary for the restaurant side of the business, and Mike, who sits on the board and has been operating Melting Pot restaurants since 1979. "The biggest benefit of working with family is the level of trust, belief, and confidence that exists," he says.

### LEADERSHIP

**What is your role as CEO?** The most important aspect of my job is that I get to work with an excellent executive leadership team. We share the vision and strategic direction for the organization as a whole, but I also see my role as supporting those team members in whatever way is necessary. Occasionally, that means removing roadblocks, acting as a sounding board, proving out ideas with them, or helping them with specific challenges or tough decisions.

**Describe your leadership style.** Collaborative and people-focused, because I believe you don't get anything done unless you have an excellent team that believes in your mission and operates from your culture.

**What has inspired your leadership style?** A number of people have been inspirational. Two of them I have to



**“You’re successful if you get what you go after and build people up along the way.”**



mention are my brothers, Mike and Mark, without whom I would not have had these opportunities. In addition, there are people in both the restaurant industry and in franchising for whom I have a lot of respect and who have helped me in one way or another to develop into the leader I am. Probably because of that mentoring and support, I approach leadership and management the way I do.

**What is your biggest leadership challenge?** I struggle at times with accountability. I don’t always hold people as accountable as I should. It’s certainly the area in which I could most improve. I’m aware of it and working on it.

**How do you transmit your culture from your office to front-line employees?** That’s something we do very well, especially when you consider that we’re in the restaurant environment, where a lot of employees tend to be part-time or transitory. We have clearly defined principles, and we’ve trained our team members on how to use those principles to guide their actions and how they handle their guests or vendor partners. This is not something people get in orientation and then forget, it’s reinforced every day. One of the organizations we studied was Ritz-Carlton—we borrowed their idea of giving everyone a “credo card” that contains mission, vision, and principles. The biggest thing we do when coaching and counseling or addressing behavior that needs correcting, is to

start from that card and compare and contrast the behavior with the things we should be doing.

**Where is the best place to prepare for leadership: an MBA school or OTJ?** I only have one frame of reference, and it’s on the job. While I did not have the opportunity to participate in higher education, I do believe that education is extremely valuable, and I encourage our team members to pursue educational opportunities wherever they can. I try to educate myself through active participation in the IFA and other professional organizations.

**Are tough decisions best taken by one person?** I don’t believe in an autocratic style of leadership, so I would say no. It’s not always possible, but I prefer to talk with those involved with an issue and try to come to mutual agreement on the best course of action. Even in cases where I make the final call because we’re not all in agreement, I want to make sure I’ve listened to every person’s viewpoint and that every person is fully heard. That’s as much for my benefit as theirs. I value their input—they’re experts in their areas—and use it in making a final call.

**How do you make tough decisions?** Most often, we work through it and benefit from varied points of view.

**Do you want to be liked or respected?** Respected.

**Advice to CEO wannabes:** Come as close to walking in your franchisees’ shoes as you can. You can’t relate 100 percent once you’ve stopped being a franchisee, but you need to come as close as you can.

## MANAGEMENT

**Describe your management style.** The way we go about managing anything—change, people, or profit center—is always with a focus on two things: 1) people, and 2) objective. If you have the right people necessary to get the job done, make clear your business objectives, and offer the right support, you’ll get the result you’re after.

**What does your management team look like?** Our executive leadership team is an experienced bunch of people who are a whole lot smarter than I am. Not all have franchise experience, but most do. Most also have restaurant experience. I wanted to prevent our becoming an inbred organization, so we went outside and brought in people who have more experience in certain areas than I do. For example, our CFO came from accounting and retail. We need the experience and diversity at the life stage we’re in.

**How does your management team help you lead?** They help in a lot of ways, but two come to mind. They are very supportive. We can say anything to each other when we’re collaborating and brainstorming, but once the

decision has been made, they are very supportive of me and of each other. This allows us to speak with a single voice. What also helps me as a leader is that they have the guts to challenge me and tell me when I'm off base or even dead wrong. It's nice to work with people like that. The last thing you want is a bunch of people in a room who are supposed to be addressing issues but are actually there to hear how smart they sound.

**Favorite management gurus? Do you read management books?** I actually learn more by interacting with peers one-on-one than by reading a book.

**What makes you say, "Yes, now that's why I do what I do!"** One time I say that is when I see a franchisee succeed—in particular one who started as a team member in the heart of the house, or serving guests in the dining room, and grew through the organization to get where they are. Maybe that speaks to me more because that's how I did it. The second thing is seeing how loyal and engaged and passionate our Melting Pot guests are. When I read the emails and letters from guests, I scratch my head and say, "How can we be this fortunate to have guests so engaged that they'll sit down and type out a full-page letter about how much they enjoyed their dining experience?"

## PERSONAL

**What time do you like to be at your desk?** I like to spend as little time as possible at my desk. I would rather be at the small round table near my desk with a couple of team members working on the issues of the day.

**Exercise in the morning? Wine with lunch?** I do lots of cycling: stationary bike during the week and mountain biking on the weekend. No wine at a work lunch for me.

**Do you socialize with your team after work/outside the office?** We do that as a company. We have family and belonging events throughout the year.

We purposely create fun things to do together to encourage the kind of environment we're striving for. The bigger we get, the harder it is to do that. (Front Burner currently employs around 600.)

**Last two books read:** I've been looking at National Geographic's *Hiking in Western North Carolina*, and I also just finished *I Wanted Wings: A Tail Gunner's Story* by Gary Hill, and Laura Hillenbrand's *Unbroken*, which is a fabulous book.

**What technology do you take on the road?** Smartphone, tablet, and often a laptop.

**How do you relax/balance life and work?** I'm still working on that. I relax by biking and hiking and spending time with my family. I've been married 27 years and have two kids I'm really close with. I have a large extended family—five other siblings and a mom who just turned 90—so I try to spend as much time with them as I can.

**Favorite vacation destinations:** The Abacos in the Bahamas and then western North Carolina.

**Favorite occasions to send employees notes:** I'm not a big birthday card person—that doesn't seem very special to me since everybody would get one. I try to look for positive occasions to send a note or call and tell an employee what I saw and how it hit me.

**Favorite company product/service:** I love any food or beverage that we prepare in our restaurants. But I would also say I am really proud of our franchise development process. We are careful not to refer to it as franchise sales, because that doesn't aptly describe what we do. The biggest thing we're doing is just purveying information so the two parties—the candidate and the franchisor—can make good business decisions.

## BOTTOM LINE

**What are your long-term goals for the company?** We're in growth mode

and are growing carefully in a thoughtful and strategic manner, and in a way that always allows us the opportunity to execute with excellence and to respect the role of franchisees in our future success.

**How has the economy changed your goals for your company?** I don't think the economy has changed our goals. Our growth has slowed and sales have had some negative impact, but we didn't retreat into a shrinking mode for viewing opportunities for the organization. In contrast, we allowed some of the challenges tough economic conditions created to cause us to look at things differently. An example is our increase in international growth for The Melting Pot. We started in Canada and are also developing in Mexico, in the Middle East, and Indonesia. We also are looking at new concepts, like Burger 21, which will provide vehicles for excellent growth opportunities for us and for our franchisees as well.

**Where can capital be found these days?** It's available. We are starting to see more opportunities with regional lenders and local banks than in the past. That has not been one of the first places we'd refer a new franchisee to, but now we do.

**How do you measure success?** I would say you're successful if you get what you go after and build people up along the way.

**What has been your greatest success?** There have been many successes, but my latest, greatest has been my success in putting together an executive leadership team responsible for day-to-day successes.

**Any regrets?** Wish I was a little taller (laughs). Seriously, I see no value to regretting things.

**What can we expect from your company in the next 12 to 18 months?** Steady and careful continued growth. ■

## CEO profile:

BY DEBBIE SELINSKY

# Walking a Fine Line

Ray Margiano takes one step back to move several ahead



A year ago, Ray Margiano, an admitted lifelong workaholic, had an epiphany. Having successfully created and grown Foot Solutions to global prominence and 173 units in 16 countries, Margiano decided to do what many high-powered executives never dare. He took a step back from the day-to-day operation of his multi-million-dollar businesses.

“Many entrepreneurs find their ideas get too big to manage or they don’t have the skill set to manage. That’s not an issue for me. However, I’ve always been a visionary, an idea person, and I found that the more immersed I became in day-to-day details—doing things other people could do—the less time I was spending on the concepts,” he says. “Like many, I reached the point where I realize the company will continue even when I’m not here.”

The result of that insight? “I’m taking a little more time personally with my family, as well as adding an extra day of relaxation to business trips so I can network with people and establish relationships,” says Margiano, who remains CEO.

Other positives born from his new approach include his latest concept, Balance Walking, a 15-minute-per-day program he designed to help people “look and feel younger.” He has lost 35 pounds with the balance concept, which incorporates the pole walking that has taken Europe by storm with meditation, good sleep habits, and a healthy diet.

In addition to serving on the advisory board of the American Diabetes Association and the board of governors at the University of New Haven, Margiano has written three books and spent a great

deal of time helping returning veterans find business opportunities.

He comes by his work ethic honestly, having toiled in his father’s garage as a kid. To afford college, he served in the Navy before attending the University of New Haven through the GI Bill, where he studied business administration as an undergraduate. After that, he worked full-time by day while he worked nights earning his master’s degree in computer science from Rensselaer Polytechnic Institute and his PhD in international business administration from Canbourn University.

After starting his career working at three large corporations, Margiano left that world in 1984 to implement his idea for Heel Quick, mall-based quick shoe repair shops. “This was in the ’80s when ladies were wearing heels to work all the time. They could sit on the stool, wait three minutes while we replaced their heels, and get back to work,” he says. By the mid-1990s, additional footwear industry changes (cheaper materials and an influx of “throwaway” products) found the U.S. shoe repair businesses disappearing.

“I realized we were in trouble, so we began to focus more on the medical side of the business, working with labs and podiatric associations on orthotics and shoe modifications. I could make a shoe if I needed to, but I realized there was a missing niche between comfort shoe stores and medical orthopedic shoe stores,” he says. In 2000, he launched Foot Solutions, which uses medical technology to scan the foot and make custom orthotics. In the process, he pioneered a niche his company still dominates today.

Based in Atlanta with a state-of-the-art lab, Margiano and Foot Solutions have opened their doors to work with

**Name:** Ray Margiano

**Title:** Founder and CEO

**Company:** Foot Solutions

**Brand:** 173 units in 16 countries

**Age:** 71

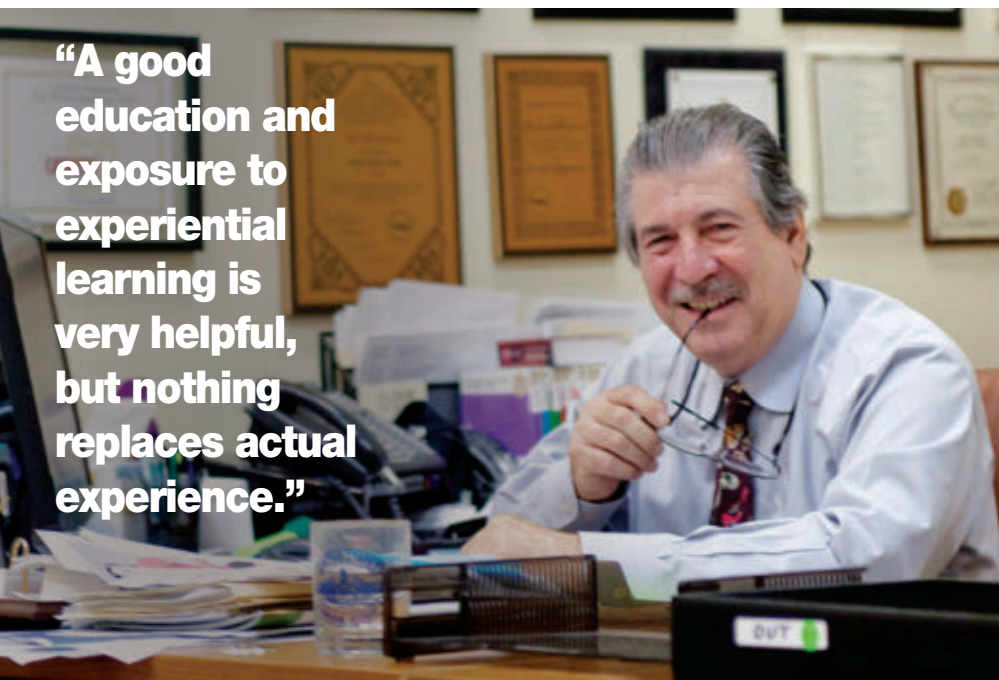
**Family:** Wife Angela, daughters Bella, Raina, and Kerrin

**Years in franchising:** 27

**Years in current position:** 27



**“A good education and exposure to experiential learning is very helpful, but nothing replaces actual experience.”**



returning veterans. “We’ve undergone training and are approved to help put vets in business,” he says. “We’ve started mobile franchising at less than half the cost of a regular unit.”

Margiano’s objective for Foot Solutions is to have 100 units owned by veterans over the next two years. “We have 15 right now and we employ about 200 vets throughout our niche. We hold job fairs and fundraisers for vets, and I also volunteer to be an adviser to those who need it,” he says.

Margiano’s support of his fellow vets has not gone unnoticed. He was named 2010 Vetrepreneur of the Year by the National Veteran-Owned Business Association, an honor bestowed annually to a preeminent role model. He says he is proud to help.

“These people have dedicated their lives, often being seriously injured, and now are finding it hard to get work. When you’ve been in an environment of life and death working closely with a team, it’s hard to replace that emotion. We want to let vets know they are not alone during this transition, that there are people willing to work with them and help them.”

## LEADERSHIP

**What is your role as CEO?** I have al-

ways been a bootstrapper and hands-on entrepreneur, which has driven many of my employees and franchisees crazy. Only in the last year have I stepped back from day-to-day management and at levels I had no business going to. Because I have always been a workaholic, I was still able to work on the bigger picture and vision of the company. Although it was difficult to do and accept, I now truly enjoy having a president run the day-to-day operation and take the weight off my back. I am getting more accomplished and staying much more focused on the company’s growth, success, and strategy for the changing marketplace, which tells me I should have done this years ago.

**Describe your leadership style.** I am very interactive but want people to get the job done in their own way and style. I don’t want to be looking over anyone’s shoulder or having to follow up. I expect everyone to do what they are supposed to.

**What has inspired your leadership style?** It started when I was very young. I worked with my dad in his garage since I was 11. He loved to look over my shoulder when I was working on an engine and tell me the next thing to do. I already knew the next thing to

do so did not appreciate that style of management, so I try not to do that to anyone I work with.

**What is your biggest leadership challenge?** Biting my tongue when someone is clearly going down the wrong path or not getting it done as quickly as I could.

**How do you transmit your culture from your office to front-line employees?** We have a very open culture. I am available to everyone and I will not hesitate to jump in any place or any time I am needed. We want people to work together and it is never about the individual, it is always about the group.

**Where is the best place to prepare for leadership: an MBA school or OTJ?** A good education and exposure to experiential learning is very helpful, but nothing replaces actual experience and working in a place where you are exposed to reality and how to deal with it.

**Are tough decisions best taken by one person? How do you make tough decisions?** Ultimately someone has to make the call. My philosophy has always been to openly discuss issues with key people or experts that I trust for open, objective input. This allows me to look at the situation a few different ways and then decide. This is a critical part of being a successful entrepreneur.

**Do you want to be liked or respected?** I think everyone deep down wants to be liked *and* respected, but no one can keep everyone happy, especially in franchising. Being fair, objective, consistent, and sticking to your core beliefs is critical. At the end of the day, being respected is achievable and should be your goal.

**Advice to CEO wannabes:** I am a workaholic and love what I do, so this is a tough one for me. Most successful people I know are passionate and driven, which is something that I don’t believe is teachable. Having said that, when I look back on my own life, there probably was more than one occasion when my choice of work over personal

was not the best way to go.

## MANAGEMENT

### Describe your management style:

I like to lead by example and by recognizing and mentoring people. I like to challenge people and help them grow.

### What does your management team look like?

A special ops group—very knowledgeable in each of their areas of expertise and working together closely to achieve the goal. We are lean, and everyone occasionally needs to step into another area to help out. “It’s not my job or responsibility” does not go very far in our organization.

**How does your management team help you lead?** Open discussion and conversations, but once the decision is made everyone is on the same page.

**Favorite management gurus? Do you read management books?** Since my college days, I have read self-help and motivational books, including some by Denis Waitley, Anthony Robbins, and Brian Tracy.

**What makes you say, “Yes, now that’s why I do what I do!”** For me it’s always about someone else accomplishing and growing. That is the wonderful thing about franchising—there’s a network of independent people all wanting to succeed and grow their own businesses. It’s always been about helping people do better, whether it’s a customer at our stores needing help or a franchisee.

## PERSONAL

**What time do you like to be at your desk?** 9 a.m. to 6:30 p.m. I work out every morning before work.

**Exercise in the morning? Wine with lunch?** The Balance Walking way of life—I authored the book and live the concept 15 minutes every day. I have wine occasionally, but never at lunch.

**Do you socialize with your team af-**

**ter work/outside the office?** Only at annual meetings or events.

**Last two books read:** *Taking People with You* by David Novak and *Dead or Alive* by Tom Clancy.

**What technology do you take on the road?** iPad and iPhone.

**How do you relax/balance life and work?** I live by the Balance Walking way of life, which covers pole walking, toning, eating to live, and meditation. Music, reading, and family fill the rest out.

**Favorite vacation destinations:** I am a water person and love the ocean. I have been to approximately 50 countries and am still searching.

**Favorite occasions to send employees notes:** Anytime. It shouldn’t be tied to a birthday or any event. I like to be there for support, especially if a person is having personal or health problems.

**Favorite company product/service:** Foot Solutions’ custom orthotics, designed and hand crafted to fit each individual foot. They’re made in the USA, and veteran-owned lab custom orthotics have helped thousands of people eliminate foot and body pain. Our customers actually thank us.

## BOTTOM LINE

**What are your long-term goals for the company?** To continue to invest in infrastructure and education for everyone in the system, making the business model more successful, and continuing growth and success for the franchisees and everyone involved in the company.

**How has the economy changed your goals for your company?** There is no question that the economic downturn had an impact on growth and certainly crushed the lower-performing stores. This was personally a very difficult time for me. No franchisor wants to see anyone fail, and because of the length of the downturn, everyone was tested, including me. First, it had to be sur-

vival for everyone. Last year we started to recover, and this year we are seeing continued improvement. My gut says it will be easily two to three more years of very slow growth in a challenging, changing marketplace that is very fragile.

**Where can capital be found these days?** There is capital available but money is still very tight for new startup businesses. In addition, many companies lost lines of credit they’d had for years.

**How do you measure success?** For me it has never been about money. For most entrepreneurs it is about building something—chasing a dream and a vision. This is where the passion, belief, and motivation take over. In franchising, if you help other people succeed and realize their dreams, you can say you have succeeded.

**What has been your greatest success?** I have started four companies and bootstrapped every one of them. We have helped hundreds of franchisees accomplish their dreams. It has to be about the relationships and camaraderie that you achieve. It’s always about the journey, and I would like to think I am still working on my greatest success.

**Any regrets?** I’m sure there are some things I could have done better. When I was a teenager working in the garage, I wanted to get an education and see the world. I also wanted to be president of my own company by the time I was 40. I did all that, and the only thing left was to retire at 50. I blew that one and am still working way past normal retirement.

**What can we expect from your company in the next 12 to 18 months?** Our objective is to get back into growth mode. We have been approved for VA training and are focusing on helping vets transition back into the workforce or their own businesses. We’ve also rolled out a Foot Solutions mobile unit and expect to open 25 new units over the next 12 to 18 months, and we are focusing on more deliverables and success for everyone in the Foot Solutions system. ■

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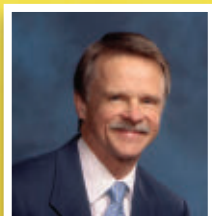


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## HOW WINNING WORKS

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World Champion Adventure Racer, San Diego City Firefighter, Founder of World Class Teams, Flashover Seminars, and Project Athena Foundation, Motivation /Leadership/Teamwork Speaker



## FEATURED SESSIONS

### STATE OF THE INDUSTRY:

#### DARRELL JOHNSON

Franchise Economist and President, FRANData



### WHERE ARE YOU IN THE RACE?

### AFDR & MYSTERY SHOPPING RESULTS:

#### STEVE OLSON

President, Franchise Update Media Group



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# OPTIMIZE

## YOUR FRANCHISEE CONVENTIONS

### Generating maximum attendance

**T**his is the first of a three-part series on how to optimize your franchisee conventions.

In this first part, we examine how to get more franchisees to attend your conventions. In the second, we will address how to get the maximum benefit from your conventions. Finally, in the third part, we will look at how you can extend the life of your conventions and ensure you derive the maximum benefit from them.

No singular event is as powerful as your convention in terms of communicating with your franchisees. It is the single most effective form of franchisor-franchisee communication. According to Katrina Mitchell, CEO of Speak!, "A key investment for most

franchise systems is their annual franchise convention. With careful planning and a focus on what you want your franchisees to take away from the experience, your annual meeting can have a tremendously positive effect on a franchisee's productivity, profitability, and passion for the brand." Because of this investment, it is critical that you maximize this event. Part of maximization is high attendance.

No matter how great your convention content and agenda are, if you are delivering it to an empty room it has no value to your system. Perhaps more frustrating than *no* franchisees attending is when only half of them show up. This results in part of your system being extremely excited and

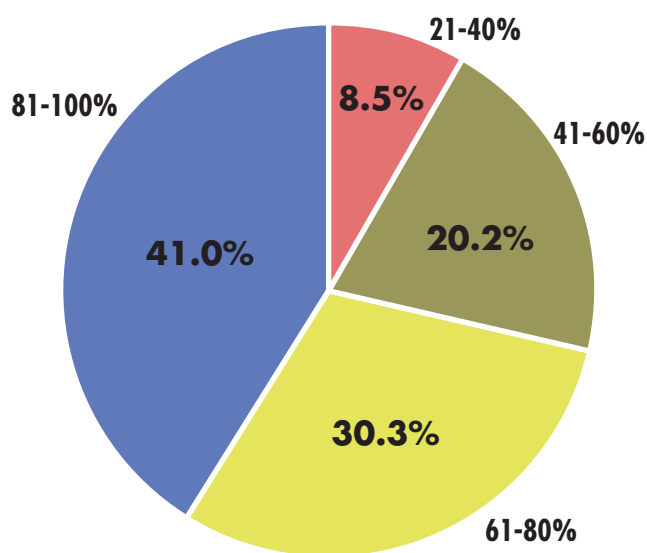
motivated, and the other part significantly lagging behind. It is critical that you have as close to 100 percent attendance as possible.

Recently, Speak!, Ingage Consulting, and Franchise Business Review conducted an online survey of franchisors about their franchisee conventions. Nearly 200 franchisors responded. The following are some of the survey results.

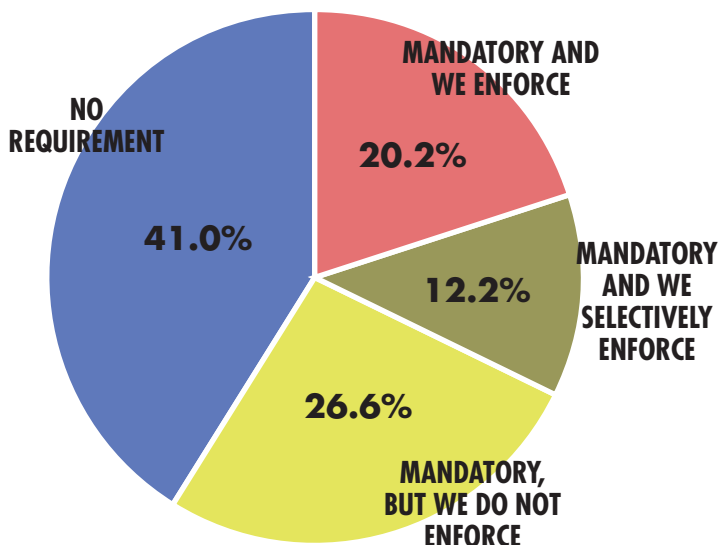
#### Maximizing attendance

The question is, how do you maximize attendance? The long-term answer to this issue is to have an event so valuable that no franchisee would want to miss it. This topic will be addressed in the second part of this series. So let's look at some short-term ideas:

#### What percentage of your franchisees typically attend your conference/convention?



#### What are your requirements for attendance?



- **Culturally, you need to make your convention a “must attend” event.** You start this process in the recruiting stage. When you are presenting your brand to a potential franchisee, talk about your convention as one of the major benefits of being part of your organization, and why no one would want to miss it. Continue developing this idea during onboarding and throughout the entire relationship with your franchisees.

- **Ensure that your staff sees your convention as a “must attend” event.** It’s amazing how often your own staff doesn’t fully understand the value of the event. Your staff’s attitude is critical to attendance. How they present the convention to your franchisees (and encourage attendance) will have a large impact on getting people excited about attending.

- **Measure results, looking at the sales and profitability growth of the attendees versus those who don’t attend.** In working with several franchisor clients it’s also amazing to note the correlation between conference attendance and sales growth and profitability. This, of course, reinforces the value of the event and gives franchisees a great reason to attend.

- **Get your advisory council involved.**

A call from a council member is much more effective than a call from staff. If your council members have regions, have a fun contest and give a small prize to the region with the highest attendance.

- **Host your convention in the best month for the event, not the least expensive one.** For example, the best month could be the one that conflicts the least with your organization’s sales cycle.

- **Provide economic incentives at the convention.** Offering special buys and lower-cost services if purchased at the convention provides value, makes selling easier, and is an incentive to attend.

- **If your conventions are mandatory, use a variance committee for franchisees to approve anyone who cannot attend.** This takes the heat off management, and franchisees are normally tougher than management.

- **If your penalty for non-attendance is termination, provide an option of a fine instead; termination is too drastic.** Put the funds for the fines in a special account available for franchisees with financial hardship who need some financial assistance to attend. The same variance committee can choose who receives the funds. You also can do fundraising for

that account. Having an auction to raise money for the fund can be popular, fun, and makes the point of how important your conventions are.

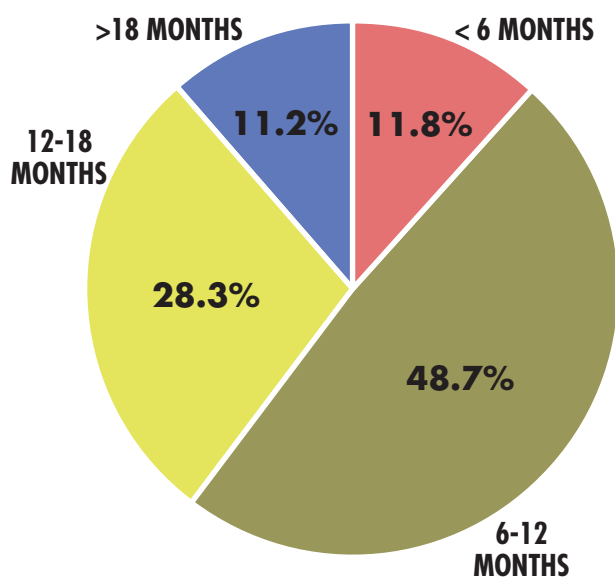
- **Plan your conventions at least 12 months in advance and offer a special for signing up for the next convention at the current one.** The convention is when franchisees are the most excited. It’s easier to sign up people then, plus it saves you from having to make an effort later.

- **Always promote what will be new at your convention.** What is new will be of the highest interest and encourage the most attendance. This further reinforces among your franchisees that they will indeed be missing something of value by not attending, which builds on the concept of your convention being a “must attend” event.

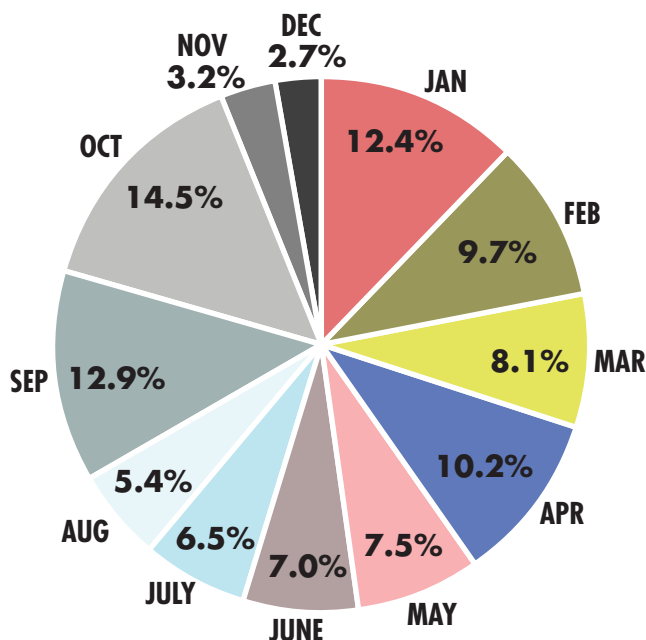
In the next installment we will talk about how to get the most out of your franchisee conventions. ■

*Evan Hackel is the principal and founder of Ingage Consulting. He has 25 years of franchise experience having developed, implemented, and managed three successful new franchise systems. He can be reached at 781-569-5900 or ehackel@ingageconsulting.com.*

### How far in advance do you typically book your meeting?



### What month is your meeting typically held?





# EmpireBuilders.tv

## MAKES ONLINE DEBUT

### Multi-unit franchisees tell their stories in new video series

**B**urton W. Folsom uncovered something revolutionary about capitalism in 19th century America. And in his books, he debunks commonly held views about the role of capitalism in the social developments of the Industrial Revolution and the Gilded Age.

Nowhere does Folsom make his case more clearly than in his 1998 book, *Empire Builders: How Michigan Entrepreneurs Helped Make America Great*. In this book, he wrote about a number of great business leaders who made their state and nation into a great economic power by the end of the 1800s.

What does any of this have to do with franchising? Plenty. Folsom's understanding of the critical importance of entrepreneurs and how they affect their cultures helped frame the development of EmpireBuilders.tv, Franchise Update Media Group's new online video series of interviews with successful multi-unit and multi-brand franchisees.

"Folsom focused on a number of great business leaders who, through their failures and successes, made their state and nation into a great economic power by the end of the 19th century," says Therese Thilgen, CEO of Franchise Update Media Group.

"The visionary entrepreneurs in the book—John Jacob Astor, Herbert Dow, and Will Kellogg—produced tens of thousands of jobs. They built up Michigan's economy when many of the early leaders of the nation thought Michigan would

never amount to anything," she says. "Then it hit me that franchisors—and in particular the multi-unit franchisees who have it all on the line—are today's Empire Builders."

Thilgen says the goal of EmpireBuilders.tv is to showcase the lessons learned and the personal stories of the multi-unit franchisees who have taken huge risks, and failed and overcome repeatedly—and show the way to success for the rest of us. Thus was born the idea to create EmpireBuilders.tv as a "three-dimensional extension" of what *Multi-Unit Franchisee* magazine has been doing in print with its profiles of multi-unit operators since 2004.



The online videos are divided into short segments focused on a specific topic or question, such as why these individuals chose franchising, what drives them, their leadership philosophies, how they measure growth, their biggest and smartest mistakes, even what they do for fun.

Key franchising players such as Gary Grace, Ted Torres, Aziz Hashim, John Metz, Ricky Warman, and Charles Smithgall were some of the first to be interviewed. Their stories are powerful, poignant, inspirational, and sometimes funny. Most clock in at 2 or 3 minutes. They are no-nonsense, quick looks into the worlds of these top operators.

Supercuts franchisee Gary Grace talks about becoming a franchisee in 1980 with a single salon. Over 31 years, he's opened 135, beginning in southern California and extending to New York and Hawaii.

John Metz discusses his first experience with franchising, when he bought a Howard Johnson's property with a restaurant that he planned to tear down. As he says in one of the videos, "I learned that franchising was a much better way

to go than trying to be independent." Since then, he's also become a franchisor.

Aziz Hashim speaks candidly about his procedures for evaluating potential new brands. "We are always looking for brands that meet our criteria. Every year we do a very robust business plan and decide which brands would work for us. Then we go

after those brands, engage with those brands, do more research with those brands, and look for opportunities within those brands.”

These are just three examples of offering a brief look into the insights and perspectives these empire builders give in their interviews on EmpireBuilders.tv.

“You have people from all demographics—from every socioeconomic level, ethnicity, and age group—sharing their honest stories of successes and failures,” says Thilgen. “There are stories of kids who worked in fast-food restaurants when they were young who now operate dozens of units. And there are stories of immigrants who came to America in search of a better life and found it in franchising.” In essence, she says, franchisees today are the broad shoulders of small business in America.

Franchising itself has gone through quite a transformation during the past half century. Single-unit mom-and-pop operators have given way to savvy

multi-unit operators who wield power, influence, and the capital to back it up. The American Dream has grown up and gone sophisticated, and the stories told

on EmpireBuilders.tv are as unique as the operators who tell them.

### Scheduled programming

EmpireBuilders.tv officially launched in March. Franchise Update will continue to post additional interviews in the coming months.

Our hope is that these video snapshots will provide insights, lessons, and useful tips for other multi-unit franchisees, as well as other entrepreneurs who may be considering a life in franchising. Through these videos, you can peek inside these professionals’ best practices in both life and business, and catch a glimpse into the lives of the extraordinary individuals who have built successful businesses, dealt with hiring and motivating employees, faced tough economic times and many other challenges, and through it all remained true to their calling of a franchise Empire Builder.

There are many stories to be told. Tune in today! ■



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BY PAUL MANGIAMELE

# Bennigan's Builds a Brand New Box

## Leveraging nostalgia and innovation to “revolutionize” fast casual

**A**s president and chief executive of Bennigan's Franchising Company, I have the honor of being at the helm of a renaissance. In Part 1 of this series (*Franchise Update*, Q2), I talked about our quest to restore the integrity of an iconic brand. Through a strategic analysis and overhaul of our training, operations, design, marketing, real estate, and supply chain, Bennigan's has differentiated itself and created a legendary brand experience for every guest, every meal, every day. Looking forward to what's next, how do we continue this renaissance beyond our four walls? How do we continue to stay true to the nostalgia of our brand while introducing new, forward-thinking concepts that are going to help

our franchise partners succeed and grow, and keep winning new guests every day?

### Creating a new box

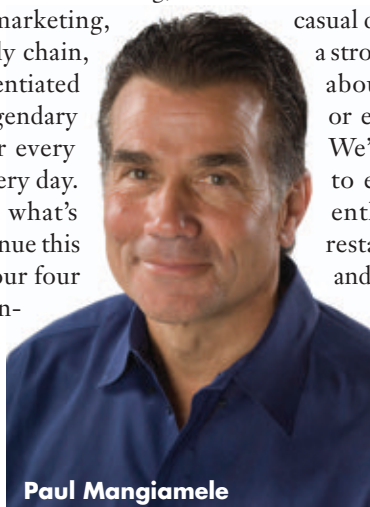
At Bennigan's, we aren't thinking outside of the box, we are creating a new box. For us, this is not just about restoring a brand. We are *revolutionizing* the casual dining segment. That's a strong word, but we're not about being in the pack, or even leading the pack. We're going beyond that to engage, enchant, and enthrall our guests, our restaurant team members, and our franchise partners.

So when I say we're creating a new box, I mean some truly new ideas that are going to change the game.

Our first breakthrough is a recent

strategic alliance that gives us the ability to offer *both* real estate and financing options to potential franchisees. When you look at the landscape of what the obstacles of growth are, the two most common stumbling blocks are finding solid real estate sites and financing. The common questions are: Where do I go, and how do I get the money? Bennigan's is now working with a national real estate firm to put together a full arsenal of weapons to set franchisees up for the path to success. We are in a unique position to bring both of these tremendous assets to the table. With our ability now to offer approved space across the country and provide financing, this truly puts us in a category of one.

Next is our fast casual concept, Bennigan's on the Fly. The fast casual segment continues to grow, but unfortunately lacks the consistent service and hospitality of a casual dining meal. Too often, guests are rushed



Paul Mangiamale



through the long line, feeling pressure to make a quick decision on food—often choosing an old standby because they aren't made aware of specials or new items—and then they sit down with no further interaction with anyone from the restaurant.

The experience is average, but not memorable. We can take fast casual to the next level by staying true to the warm and friendly service and hospitality our guests have come to expect. We will differentiate ourselves with a guest service coordinator who will act as a brand ambassador. Our Irish Hospitality will be felt in everything from the way we serve guests in the line to the way we bus tables, and how we engage with customers in the dining area.

The fast casual model takes us beyond our four walls to enjoy more points of distribution. Non-traditional real estate opportunities allow for development in airports, hotels, hospitals, cruise ships, universities, and other locations. This means the opportunity to put our food into the hands of more people than ever before. If they like that experience, they will seek out our traditional restaurants as well, and we will have created a loyal guest.

I am also excited to talk

about another game-changer Bennigan's is introducing: catering. It is the largest initiative we have ever undertaken, and quite simply, no one else in casual dining is doing it to any scale. Thanks to our software partner, Monkey Media, we will be rolling out a powerful back-end system to execute local catering operations on a national level.

We are testing this in Chicago with phenomenal results and project that catering will become 15 to 20 percent of our sales. Our franchisees can expect to see 60 percent of this incremental increase added to their bottom line. Catering is an often overlooked opportunity, but when done well it is another touch-point to extending hospitality beyond our four walls and into the community.

#### **The quest for the best**

Even as we look beyond our four walls to our next initiatives, we must continue to focus on our restaurants and constantly refine our menu. Our quest for the best hamburger in the business led us through a thorough review of test patties available around

the country. We ended up with a unique Bennigan's patty: a handcrafted, half-pound burger that will make its debut on our new summer menu. Our price point stayed the same, but we were committed to finding the absolute best beef that would make our burger stand out. It is this attention to detail and excellence in all we do that will continue to define our dining experience and differentiate us from our competitors.

It is an exciting time to be in the casual dining business. Our customers have more choices than ever before on how to spend their dining dollars. All of us in the foodservice business must continue our focus on the customer experience, challenging ourselves to create new boxes. Bennigan's has a unique opportunity to reclaim the nostalgia for our brand, while also redefining ourselves with cutting-edge food, service, and hospitality. In my humble opinion, that's not only the formula for a how you stage a comeback, it is also how you begin a "revolution"! ■

**Paul Mangiamale**, Bennigan's president and CEO, was hired to take over the brand in May 2011. Contact him at 469-248-4419 or [www.bennigans.com](http://www.bennigans.com).





## Know Your Customer

BY DINA DWYER-OWENS

**A**fter 30 years in franchising, there is one lesson that I've learned personally and shared professionally. It goes like this: It's one thing to know your business. It's another to know your customer. If you can master both of these things, you will be extraordinarily successful as a result.

That is true across our service brands at The Dwyer Group. And it's true in my role as chairwoman and CEO as well. When I assumed these roles in 2007, some people could not imagine a woman in a "male's role." But instead of focusing on other people's reservations, I concentrated on a perspective we could all agree upon:

*I am the target customer. I am the woman of the house, the person who typically schedules the majority of some 2 million service and repair calls our service brands make each year. And my experience matters.*

Yes, it's good to know how to fix an air conditioner, replace a broken window, or restore a flooded basement in the case of our service brands. In fact, it's wonderful to know how to make a cup of coffee, change a flat tire, or cook a hamburger. It's imperative to know how to arrange a cookie bouquet, run a daycare, or sauce a pizza. The services or goods provided by any franchise, and the business training to

execute those things, are to be expected.

But how is the experience for the customer? Did you make a lasting impression? Is the customer going to remember you to the extent that they tell a friend? Now, we're talking.

By turning the tables and looking at your business from the point of view of the customer, you might elevate your service. You might hire and train people differently. What's important to you may not be the same thing that is important to your customer. So, you might not only do what's expected—you might also do the *unexpected*.

At The Dwyer Group, we love doing the unexpected across our brands. Getting to know our target customer has boosted the satisfaction ratings of our service calls across our franchise family. The woman of the house doesn't just want a problem fixed. She also wants peace of mind. That means delivering in the details.

For example, repairing a broken toilet is one thing, but she's about to let a stranger in her home and needs to feel safe. A service professional in a clean uniform, a branded vehicle parked on the street, and an overall job that keeps the whole house clean while, yes, fixing the toilet, are paramount. Are you delivering that kind of serenity with your business?

I found a real place in my role as chairwoman and CEO of The Dwyer Group. I didn't need to be a master plumber, but I did need to know how to lead a great team. And the female perspective has added an emotional touch to the way we approach business. As a wife, mother, and CEO, I can say that no one questions my ability to do my job. In fact, both women and men relate to me because I'm not afraid to be myself and show my emotions. I'm the target customer, and that's an important point of view to bring to the business. Which begs the question: Why can't we put more women to work in the service trades?

That was magnified when I had the opportunity to challenge myself and see the female presence within The Dwyer Group at the grassroots level—and in front of more than 10 million TV viewers. I went undercover on the CBS show "Undercover Boss," where I worked alongside Tanna Marino, a female ser-

vice professional who proved to be a role model for women in the trades. Although women make up 46.7 percent of the labor force, this industry is traditionally male-dominated. However, Tanna, in her job with Mr. Appliance, and other female service technicians are working to shatter this. And their ratings from happy customers are astounding. Again, they know the business and they know the customer.

After completing my journey on "Undercover Boss," my passion to find more opportunities for women to pursue careers across the service brands was reignited. I had Tanna consult with me for a Women in Trades program to attract others like her to our service brands. And today she is a member of the corporate team for Mr. Appliance as a franchise consultant for the system.

As I work to develop a Women in Trades program to add talented service professionals who will be embraced across our brands and by our customers, I am reminded that there is always room for improvement with our businesses. I am now on a mission to involve more women like Tanna where job opportunities exist and where women can earn admirable income in an industry that welcomes them.

Although every franchise founder obsesses about launching a company, signing the first franchisee, growing the network, and building the brand into a household name, I encourage you to get to know your customers. Provide the best customer service possible and find a way to keep yourself, associates, franchise owners, and employees accountable. See your brand beyond what it sells. See it for how it is received. When you focus first on people and activities, profits will follow. ■

*Dina Dwyer-Owens, CFE, has served as chairwoman and CEO of The Dwyer Group since 2007; before that she had served as president and CEO since 1999. She is a former chair of the IFA, spearheaded the reintroduction of the IFA's VetFran program in 2001, and in 2002 received the Bonny LeVine Award, the IFA's highest award for women who mentor other women and advance the careers of women in franchising.*





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# Market

Consumer marketing initiatives

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Anne Gillaspie, CertaPro Painters

BY KERRY PIPES AND EDDY GOLDBERG

# It's Time

## FRANCHISE CONSUMER MARKETING CONFERENCE *GROWS UP FAST!*

**W**hen the keynoters, panelists, and attendees at a conference can't stop talking about emerging technology and social media tools, it says a lot about the current state of franchise marketing. So it was at the 2nd annual Franchise Consumer Marketing Conference, held at the elegant, historical Fairmont Hotel atop San Francisco's Nob Hill this past June.

Since its launch in June 2011, the conference has become a darling of chief marketing officers, brand managers, and marketing managers. Increased attendance

by franchise marketing executives and sponsors were a testament to the event's rapid growth. With 95 franchisors representing 140 brands, the conference doubled in size from its inaugural year—and so did the number of exhibitors.

"Never before have so many franchise consumer marketing executives met together in one place," says Therese Thilgen, CEO of Franchise Update Media Group, which hosted the conference.

As for all that tech talk, the conference's theme this year—"It's Time"—was dead-on. In the words of boot camp leader Scott Klososky, "The world around us is becoming automated, there's a massive

increase in the volume of information we digest, and this is radically altering the way work gets done."

The overall buzz at the conference was upbeat as marketing executives and vendors spoke positively about consumers' buying and purchasing trends and the general state of business. But the focus of the event remained on marketing, marketing, and more marketing. Tools, strategies, techniques, and technology were shared freely and often at sessions and throughout the hallways during the two-day event, with participants candidly discussing their marketing successes and failures—and





Steve Baxter, Satmetrix

Scott Klososky,  
Boot Camp  
Leader

Kim Miller, Primrose Schools; Alicia Thompson, Popeyes Louisiana Kitchen; Jessica Eng, Allegra Network

what they've learned from both.

The conference featured four separate tracks that ran concurrently throughout the event: Customer Relationship Management; Franchisee Buy-in, Delivery, and Results; Marketing Execution Strategy; and Brand Development and Rejuvenation. One interesting note: sessions were repeated, but featured different facilitators and panelists each time. Evolving technology and social media were a significant part of most of the sessions.

One recurring theme involved convergence and integration: how sales automation, CRM, mobile, and related technologies are merging into more comprehensive solutions—and are driving sales, marketing, and IT departments to work more closely together to develop system-wide consumer marketing strategies and tactics.

#### Boot camps

The conference kicked off with two all-morning boot camp sessions. Klososky, a

futurist and former CEO of three start-ups who keeps his eye on technology and its impact on business and culture, led one of them. Klososky has a talent for identifying technology trends and understanding how they can be applied to business practice. His half-day session was called How To Embrace Social Technology To Strengthen Your Brand.

Some of his first words were, "We are in a technology explosion. It is pervading nearly every facet of our lives... and speeding up." Fittingly, throughout his presentation, he read and answered questions that had been submitted electronically by the audience. One of his central themes was how we are living in a time when "anyone can have a voice—worldwide, instantly, for free—and it is virtually unstoppable."

He was intent on showing attendees that if their companies don't adapt to changes in technology they will be left behind (think Kodak, Blockbuster, and Borders). Technology changes the battlefield and determines winners and

losers, he said, and companies can win market share by consistently applying new technologies sooner.

Companies using technology today to gather more information (especially about customers), analyze it, and act on it will be the successful companies of tomorrow, he said. And, he warned, executives who say they are already successful and don't need to learn about new technologies are destined to fail.

The other boot camp essentially was four sessions in one, each focused on creating a "customer mania" culture within franchise organizations. Led by Ed Waller, vice president of CRM at CertaPro Painters and this year's conference chair, the sessions were: 1) Consumer Insight Drives Brand Experience; 2) Training for Brand Delivery; 3) Measuring the Brand Experience; and 4) Every Consumer Has Become Their Own Brand.

Each segment featured a different set of panelists, and each built in time for questions, followed by a 15-minute "table



Melinda Caughill, Third Person (front), Liberty Harper, Fatburger



Ed Waller, CertaPro Painters, Conference Chair



John DiJulius, Keynote Speaker



Rich Hope, Jersey Mike's



Jennifer Kushell, Brad Fishman

exercise" in which attendees answered a challenge question and then shared their answers with the group. For example, in the first one-hour segment the question was, *What "new media" tactics should be put in place to help drive traffic and build sales?*

#### Afternoon delight

The morning boot camps were followed by lunch in the sponsor networking gallery, where franchise marketers held animated discussions with dozens of vendors and suppliers—who were, not surprisingly, heavy on technology, especially those involving mobile payments and integrated marketing solutions.

Following the networking lunch, attendees gathered for the day's keynote address by customer service guru John DiJulius, founder of The DiJulius

Group, a customer service consulting company, and president of John Robert's Hair Studio & Spa. He served up numerous examples of organizations that provide "world-class customer service," as well as several that don't. He discussed terms such as "service aptitude," which he describes as the ability to recognize opportunities to exceed customers' expectations—*regardless of the circumstances*.

Drawing on examples from his research and personal experience, DiJulius encouraged attendees to create a "customer service vision, a customers' bill of rights, and provide the opportunity to be a hero." These strategies, he said, empower and inspire both managers and employees—and propel brands into greatness.

The rest of the afternoon was spent

in breakout sessions that dug into topics such as franchisee buy-in for deploying marketing tools and strategies, using the power of PR, and predicting and measuring customer acquisition.

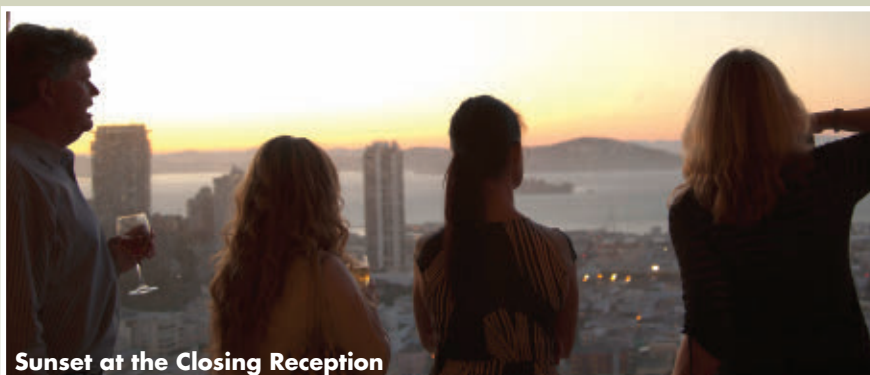
#### Next day, next gen

The second day kicked off with breakfast in the networking gallery. Following that, attendees gathered in a general session for an eye-opening presentation called "The Next Generation Workforce" by Jennifer Kushell, who has done extensive research on 20- to 30-somethings (also known as Gen Ys and Millennials). Whether you understand them or not, these children of the Baby Boomers are here in large numbers and are today's—and tomorrow's—employees, customers, and franchise buyers.





Creative Marketing Competition contestants



Sunset at the Closing Reception

Kushell, a Gen Xer, says this group of young people—1 billion of them entering the workforce worldwide—think and act differently than previous generations, and that for franchises to continue to succeed they must address this demographic group accordingly. This “constantly connected” generation gets easily bored, she says, and suggests presenting them with “big meaty goals, stretch goals.” As for achieving them, “If they don’t it’s humbling, if they do it’s rock stars.”

Her research identified five motivating factors for the Next Gen demographic: 1) they want to be valued, 2) they want to make an impact, 3) they want big goals, 4) they want to be trusted, and 5) they want to like you and feel a part of your team.

Kushell suggests offering coaching and mentoring opportunities for this group, giving them some freedom and flexibility, providing them with clear career paths, and offering them opportunities for growth. “They don’t really know what they want to do with their lives, thus your job as employer becomes mentor and career coach, growing them within your company,” she said. Treated right, she added, they will make your company more successful.

Concurrent breakout sessions filled the rest of the morning before lunch and a second opportunity in the networking gallery for attendees to learn more about what the sponsors and vendors had to offer.

Technology and its power to change marketing—in both strategy and prac-

tice—pervaded the two-day event. It’s here to stay, constantly evolving, and can be frightening and confusing. However, according to speakers, panelists, and franchise marketing executives alike, the key is to stay on top of it, embrace it before your competition does, roll with the changes, keep experimenting, and measure the results where you can. This approach will lead some brands to the top of the market and deliver increased market share.

Plans are already under way for next year’s Franchise Consumer Marketing Conference, scheduled for June 2013. Watch for more information and details for registering at [www.franchiseconsumermarketing.com](http://www.franchiseconsumermarketing.com), where you can also view and download 11 of the conference presentations. ■



# Share and Share Alike

## Franchisors and franchisees team up on local store marketing

**W**hen the weather in Pennsylvania turned unexpectedly warm this past March, a local Quaker Steak & Lube held an “emergency” bike night in their parking lot—much earlier in the year than usually possible.

“Quaker Steak & Lube uses our parking lots as a revenue generator, with lots of outdoor events,” says Russell Berner, vice president of restaurant operations for JDK Management Company in Bloomsburg, Pa. “It’s a marketing tool for people to have fun and come back other times.”

JDK also operates other restaurants (Perkins), hotels (Holiday Inn Express, Microtel Inn, Econo Lodge, and Hampton Inn), and nursing facilities across six states in the eastern U.S. And at their Florida Quaker Steak & Lube location, the parking lot events for bikers and car enthusiasts are year-round (barring hurricanes).

“We operate from some of the largest brands to new, up-and-coming brands like Quaker Steak & Lube,” says Berner. Local store marketing at the grassroots level is part of the brand’s roots, he says.

“We follow that model as we develop in small and medium markets.”

About three years ago, Quaker Steak & Lube embraced a local store marketing program at its corporate restaurants and created marketing activities coordinator (MAC) positions. The MACs focus on driving traffic to restaurants through activities such as daily events, community participation, and doing anything and everything to promote the restaurants. The MAC positions, which steadily expanded from part-time, resulted in increased sales at the corporate stores. When franchisees got wind of that, they wanted in.

“The franchise community was asking, ‘What are the company restaurants doing that’s working so well?’ The managers at the company restaurants attributed it to great operations and the matured MAC program,” says Megan Duniec, director of field marketing for the Quaker Steak & Lube Support Center in Sharon, Pa.

Although some franchisees embraced the MAC program around this time, it soon became clear to them that the MACs at their franchise units needed additional training and guidance. So in

July 2011, The Lube restructured its field marketing support to help franchisees attain similar results, hiring three field marketing strategists, which they call MACROs (marketing area catalyst of revenue optimization).

With the introduction of the MACRO team, each franchise location was asked to employ a local MAC. The MACRO

**Megan Duniec**



team would then help support the local MACs, with the ultimate goal of increasing same-store sales through local store marketing. MACROs devote their time to training and developing restaurant-level MACs, implementing restaurant visits, helping to create marketing and PR plans, and delivering additional support tailored to the local market.

“In 2011, The Lubes that embraced the MAC program saw same-store sales rise 2 percent,” says Duniec. “A strong local store marketing program can keep you on the minds of your guests far beyond their time spent within your four walls.”



**“Quaker Steak & Lube uses our parking lots as a revenue generator, with lots of outdoor events. It’s a marketing tool for people to have fun and come back other times.”**

**—Russell Berner**

"It's probably the most progressive thing I've ever seen in local store marketing support," says Berner. "They've put their money where their mouth is."

The addition of the MACRO positions changed what was seen as an additional burden—despite the positive results—into a program offering additional support to attain those results.

The MACs work out of the local restaurant and are paid by the franchisee or company restaurant, while the MACROs are supported by the system's advertising fund. "That's the direction the franchisees wanted," says Duniec. "This allows the general manager to entrust someone else to handle those things, and to focus on operations."

Berner agrees. "It was a mutual approach. We wanted more support in marketing and getting the word out. Since we can't afford television-type penetration and corporate was doing a very nice job with it, we asked for more," he says. "They stepped up and hired additional personnel for more local support."

Initial results from the collaborative program include more Facebook fans, email club members, and text message recipients. Growing these databases is a key focus of the program.

"Once the infrastructure and personnel are in place, it's all about what tactics and programs are developed at all levels to be used in local store marketing," says Berner. "They always had a strong marketing department with creative, entrepreneurial thinking. It's the core and essence of the brand, and they found a way to build on and improve that for the franchisees."

Franchisee buy-in, often a problem when spending is involved, was not a problem here—in fact, it was the opposite. "They're the ones that drove that structure," says Duniec. "Without that support from operators it's hard to keep something like this going."

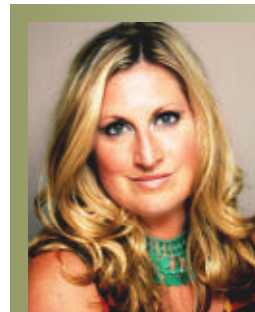
#### **"Micro group" marketing**

Over the past two years, CertaPro Painters has been experimenting with a re-

gional marketing program, looking to hire what the company calls a "micro group" marketing manager: a marketing person shared among a small group of geographically contiguous franchisees, usually two to four.

The program seeks to support marketing activities for the brand's smaller franchisees, who can't afford to hire a full-time person themselves. By combining their part-time needs into a full-time position, a small group of franchisees can gain the benefits of having a dedicated marketing person, growing their business, and focusing on operations.

"It's still a very young program," says Anne Gillaspie, brand manager at CertaPro. "We're trying to introduce it into the field more in the coming years."



**"All the grassroots local branding has to be done in their turf. The franchisees are really liking the idea. The main goal is to get our brand out there."**

—Anne Gillaspie

Last summer, the company tested a version of the program in Toronto, hiring a marketing manager for a group of eight franchisees (too many, says Gillaspie today). And while she says there was not enough data to produce a strong conclusion, the entire group did see a lift in business, and the test run provided a great deal of useful information about the training and management of the shared marketing manager.

Since residential painting is seasonal, franchisees who could afford to hire a marketing person during their busy season could not afford it in the slower winter months; and marketers seeking steadier or greater income often would find other jobs and not return the following year. "We were investing in people, but losing them," says Gillaspie. "So why not join businesses who need it, and the

franchisees can pay by the project."

Larger and mid-sized franchisees in the system are able to hire their own marketing managers. Gillaspie says there are about 55 marketing managers working for these franchisees, either full- or part-time. "We've been hiring marketing managers for years," she says. "We're trying to duplicate that for groups of two to four franchisees."

Although the program was developed at corporate, the franchisees do all the hiring and management, often working in concert with the general managers. "Finding the right candidate for the position is important," says Gillaspie, who should know: she has been involved in the genesis of the program since 2009, when she became a part-time market-

ing manager for a CertaPro franchisee in Denver. Word got around, and about six months later she met with corporate, who hired her to develop similar marketing programs system-wide.

Except for promoting the program to the franchisees and providing the training modules, there is no direct corporate involvement in the day-to-day execution of local marketing. "It's all on the franchisee level," she says. "We take a micro group within the co-op, which starts recruiting for this person. When they agree, they hire someone and share the responsibility for overseeing that person's hours." The cost of the marketing person is shared among the franchisees in the micro group, with payment based on the number of hours that person works for each franchisee.

Training is done through a set of six

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online e-learning modules that she and a colleague created, and takes about two to three weeks. “My role is support,” says Gillaspie, who is available to answer any questions from the marketing managers, both during and after their training.

The results—based on number of leads, scheduled estimates, and jobs that close—have been positive, she says. Success is based on each franchisee’s marketing plan for the year and the marketing manager’s ability to increase those numbers.

“The role is flexible,” says Gillaspie, dictated by the needs of each franchisee in the micro group. Activities can include creating a team of canvassers to recruit leads, overseeing sign placement, and knocking on doors, making business introductions and distributing door hangers; as well as following up on estimates, making callbacks, and managing a customer thank-you program in their area. Many of these local grassroots marketing activities can be done from a franchisee’s home office or their own office.

Marketing managers also can use social media to spread the word, interacting and engaging online with potential, current, and previous customers. And while this activity can be done from anywhere, “All the grassroots local branding has to be done in their turf,” she says.

The benefits for franchisees, she says, include having their own marketing person with the background and qualifications to take the message, strategy, and tactics from corporate and implement them in the field. The benefit for the marketing manager is a full-time job spread over different territories, with the franchisees paying for only the hours they need.

Although the program is still young (only about 2 groups have been successful and stuck with it, says Gillaspie), “The franchisees are really liking the idea,” she says. “The main goal is to get our brand out there.”

#### **A franchisor’s guerilla education**

At i9 Sports, grassroots local store marketing “has been something we’ve done from the outset,” says Brandy Zickefoose, brand manager. “It’s how the model started out. We like to keep startup and

marketing costs low.”

Three years ago, when i9 opened a corporate store, it became readily apparent to management that franchisees were being asked to do too much—in both time and money—to carry out the company’s recommended marketing activities.

“It was a huge change for us. We saw an immediate need for these resources, that it was a lot for one person to take on,” she says. “For franchisees managing guerilla marketing efforts for several locations, it was important for us to put training in place, as well as show them how to execute particular tasks: where to go, what to say, and how to track it.”

About two years ago, i9 started developing specific processes and tracking the resources required for, and the results of, its local marketing efforts. After some fine-tuning, the company introduced a

franchisees basically to “go do” all the marketing activities corporate recommended. Now the message is much more specific: “Here’s what you’re doing this week.” That could include building relationships with schools, distributing flyers to send home with students, developing relationships with PTAs, and coordinating with school events; blanketing an area with road signs; and developing partnerships with local businesses (bowling alleys, spas, family-friendly restaurants) and collaborating with local restaurants on a “kids eat free night,” distributing coupons to customers to help drive sales.

“It’s all about building relationships with organizations that reach that same target market, and developing mutually beneficial programs,” she says.

Even putting out road signs has become “more granular and strategic,” she says, and i9 created a spreadsheet with



**“It was important for us to put training in place, as well as show them how to execute particular tasks: where to go, what to say, and how to track it.”**

**—Brandy Zickefoose**

new-and-improved plan to franchisees last summer at the company conference. She says it was well-received.

Since opening that corporate store 3 years ago, she’s been working on tightening up the brand’s local store marketing efforts and how they measure its ROI. “As we’ve become more effective and track the results, we’ve been able to reduce traditional marketing efforts and put the money saved back into guerilla marketing,” says Zickefoose.

“Low-cost marketing initiatives are always received fairly well, as long as they show results,” she says. “It was probably a bit overwhelming to think about all the things you could do until we developed the processes for how to strategically plan what you want to do, and the resources needed.”

In the past, she says, corporate told

maps showing franchisees where to place them. “If I know where they’ve been, we can follow up and manage better,” she says. “Before, we gave them a bunch of signs or flyers and did not know what was going on.”

Tracking marketing initiatives at each location allows her to see the results on a weekly basis—and how many leads, prospects, and new customers came on board that week. “If three of four are doing well, we can track to see what’s being done and not done,” she says.

Making this all happen, however, was not a slam-dunk. “It’s hard to train. We’re trying to get our arms around it,” she says. Since then, i9 has developed scripts with talking points, webinars, and is doing more training. “It’s an ongoing education for us,” she says. And for the franchisees as well. ■

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# THE GREATEST OPPORTUNITY FOR RESTAURANTS TODAY

“Give the customer what they want - Your Menu....Online”

**F**oodservice operators understand the importance of the first part of this statement, and have done a great job creating their dining experience – from restaurant design, color scheme, menus, beverages, and pricing – to match their customers’ expectations. But what do potential customers want to know BEFORE they walk into your restaurant, and where are they finding the information they need? The answer – the number one item people look for when making a dining decision is your menu, and the number one place they’re looking for that menu is online.

Current statistics show that 73% of online searches are related to local content, and that restaurants are the most searched type of local business. Furthermore, when making a dining decision, your restaurant’s menu is more of a priority to these consumers than your location, reviews, ratings and even coupons. Over the past 3 years, domestic searches on Google that contained the word “menu” have more than doubled as consumers increasingly make their dining decisions online. That is why it’s imperative that every brand migrate this information as broadly as they can to the digital world. Clearly, the way diners make decisions has changed over the last decade. The question is – has your system kept up with these changes to take advantage of these massive number of local food-related Internet searches?

While most brands have a website, a presence on Facebook, and possibly good engagement through Twitter, these social media tools are only used by customers who already know your brand. Your potential customers visit search engines, city

**“SinglePlatform is a no brainer. My menu is my greatest asset. With SinglePlatform I know my menu is added to every website and it’s always accurate since I control the content”**

— MAGDA WYBIERALSKA,  
GENERAL MANAGER, LES HALLES

guides, travel sites, and review sites to find NEW venues, and they increasingly use itemized search to find restaurants that serve the one dish they’re craving at any given moment.

So if the key influencer in the dining equation is your menu, and millions of potential customers in major markets are searching for this information online, why haven’t most brands created a huge digital footprint that also allows for itemized search? Here are a few reasons:

- It is virtually impossible to keep track of the ever expanding universe of applications and platforms where you need to post your current menu
- Ensuring that your menu, pricing & specials stay current and accurate poses an equally daunting task
- Optimizing your menu for mobile apps is not as easy as it looks (just ask Facebook)
- Making sure that your updates are simultaneously updated (to avoid online confusion) takes technical skills that are probably not available in-house

Faced with these challenges, most brands limit their digital presence to the above mentioned “inclusive” channels – their website, Facebook & Twitter – and thus miss out on reaching all the potential consumers searching the web who are not already familiar with their brand or their current menu/pricing/specials.

About two years ago, SinglePlatform endeavored to fill this vacuum. The company has created a simple, efficient and cost-effective platform for foodservice operators to update their menus/pricing/specials once, and broadcast this information to the widest net available on the Web. Through exclusive publishing arrangements with most of the Tier-1 content distributors on the web (like YellowPages.com, foursquare and Urbanspoon to name just a few), SinglePlatform is able to leverage its proprietary technology to allow foodservice operators to post changes once, and have them simultaneously broadcast to all relevant online publishers on the Web (including your company’s website, Facebook page and Twitter account).

Within the last quarter, the online menus posted by SinglePlatform were viewed over twenty five million times, and that number is increasing exponentially as more publishers go live. SinglePlatform has also created a system that meets the needs of the entire foodservice sector – from single independent fine dining establishments to massive QSR franchise systems. If you’re looking to efficiently reach your best prospects online, let SinglePlatform help design and implement the best solution for your company. ■



# Transparency and Disclosure

Denny's relies on communication, mutual respect, and continual franchisee feedback

**J**ohn Dillon is a straight shooter in describing what he's been doing as vice president of marketing and product development at Denny's. "I've spent the last five years working to drive the overall marketing strategy for the brand and spearhead compelling marketing campaigns that will help drive sales in our restaurants," he says.

Dillon is no newcomer to franchise marketing. Before joining Denny's, he was vice president of marketing for the NBA's Houston Rockets. He also spent 10 years with Yum! Brands, where he held various leadership positions in brand marketing, national product launches, menu development, consumer insights and strategy, product innovation, field marketing, and finance.

We asked him about Denny's approach to franchisee relationships and collaboration, and what role strategies like "full disclosure" and "transparency" have had on sales, customer satisfaction, and system growth.

**Describe your role at Denny's.** As vice president of marketing and product development, my role includes developing new products, optimizing the core menu, creating the marketing calendar for the year, and ensuring that our franchise partners have the support they need to succeed. We are very proactive in sharing our marketing plans with our franchise partners and include them in the development process. Our franchisees are our eyes and ears to the field, and their contributions and opinions are invaluable. They are on the front lines every day with the guests and have a very good sense of what will resonate best.

**What role do terms like "full dis-**

**closure" and "transparency" play in your overall marketing scheme for reaching prospects and for assisting existing franchisees?**

Transparency and full disclosure are imperatives for a successful franchise partnership. As far as working with exist-



ing franchisees, our goal is always to be collaborative and transparent to ensure that our franchisees have the opportunity to weigh in on decisions that affect their restaurants. The same spirit of full disclosure applies to reaching franchise prospects as well. It is very important to be open and honest from the start of a potential partnership to ensure that expectations are aligned.

**Why is a policy of full disclosure important for today's franchise buyers?** There is a lot of information available to franchise buyers today and a lot of growing concepts that are getting into the franchise model. Any brand considering franchising must operate under a policy of full disclosure if they

want the relationship to succeed. Franchisees are the operators of our business and need full disclosure to successfully run their business.

**How is Denny's reaching prospects today? What's changed about the "openness" of the processes?** We continue to reach prospects through a variety of channels. We are fortunate that as a nearly 60-year-old brand, we are well known in the franchise community. We are currently placing an emphasis on growing the brand outside of the U.S., so we're focused on finding well-qualified franchisees to help us grow Denny's internationally. Being open with prospective franchise partners continues to be essential to find the right match for the brand.

**Doesn't it just make sense to come right out and be as open as possible with prospects?** Absolutely. We have a very collaborative relationship with our franchisees and a very strong franchise group organized under the Denny's Franchise Association (DFA). We work closely with the DFA to ensure that prospects know exactly what is expected of them and what they can expect from the brand. As with any business relationship, open and honest communication is essential.

**How have prospects changed in the past 5 to 10 years?** Qualified prospects still remain focused on the brand's financial health and growth performance. However, as a legacy brand, the question of relevancy often comes up and continues to be of equal importance.

**What marketing strategies are you using to be more open and transparent with prospects?** Franchising is a relationship business, so each year it is important for us to let our target audience group know what's new at Denny's. To help do so, we collaborate with national trade publications such as *Franchise Update*, *Franchise Times*, and the *Wall Street Journal* to keep them informed. Of equal importance, we also exhibit and network at the Multi-Unit

Franchising Conference, Restaurant Finance & Development Conference, and attend the Restaurant Leadership and IFA conferences. We also have a very informative franchise recruitment website where we offer interactive webinars four to six times a year. We also welcome potential prospects to contact our franchise team directly by phone or email for any inquiries.

**What tools do you use to transparently provide information to prospects after initial contact and throughout the process?** Our online portal and franchise webinars have been excellent tools for us to communicate with potential prospects. Each webinar lasts about 20 minutes and includes a live chat feature for participants to submit a question anytime during the presentation. After the webinar, we use an email string where we share current and relevant news alerts on Denny's. Our recruitment

process has many stages and is generally measured from interest to real intent, and then completion of the franchise application. We provide each of our candidates with a number of resources, including an FDD, sales literature, and franchisee testimonials.

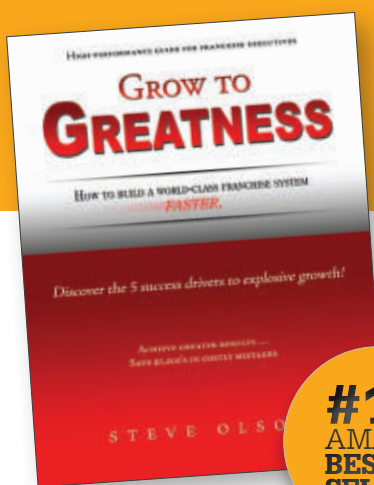
**What is changing in terms of how existing franchisees need to communicate?** Over the last several years, the expectation for regular communication has increased from both sides. We live in a much more collaborative time today, where information is passed back and forth quickly and regularly by email and the expectation for prompt response and feedback is expected.

**What are the three most important keys to creating open and transparent communication channels with your existing franchisees?**  
*1. Regular coordination and communication.*

By that I mean that communication cannot be a one-way street. Franchisees and the brand need to work together to come up with marketing and menu ideas that receive buy-in from both parties.

*2. Mutual respect.* A franchise partner chooses to work with a brand because they have a passion for the product and what the brand stands for with consumers. And the brand is selecting the franchise partner because we believe they can succeed in growing the brand through their franchise locations. Maintaining this mutual respect comes from regular communication and collaboration, as outlined above.

*3. Feedback.* The feedback from the franchise community is essential to develop successful programs moving forward. We solicit feedback from our franchisees regularly to understand what is working in their eyes and what we can improve upon. We take that feedback to heart as we develop new programs for the brand. ■



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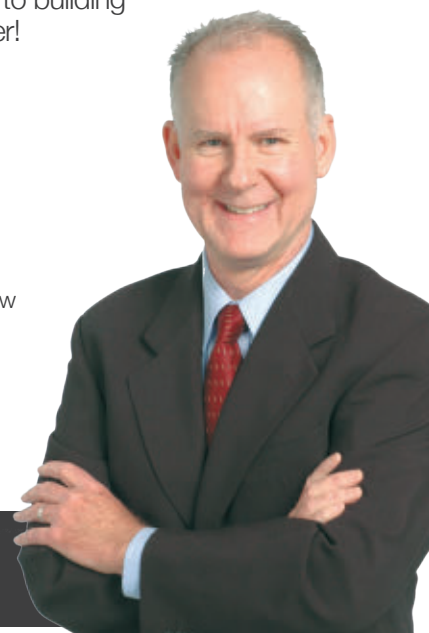
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Steve Olson is President of Franchise Update Media Group. He has been a franchisee, franchisor and consultant.

\*During 2011 April & May dates for franchise and retail business books

# CMO roundtable:

## “What are the keys to better, more open communication between your brand, franchisees, and customers? What tools or strategies do you use?”

**Marla Pieton**  
Senior Director of Marketing  
Quaker Steak & Lube



Every quarter, we host a Franchise Owner Dinner and Roundtable. The purpose of this get-together is to allow a free exchange of ideas about how we can improve franchise support and further strengthen our brand. We also like to refer to the session as a “What’s stupid around here” meeting, with the ultimate goal of having open, transparent dialogue between franchise owners and Lube team members. Being transparent, or operating with a lack of secrecy, has proven to be a critical component of our brand’s growth and 38-year success.

At one memorable roundtable, we spent significant time discussing our menu and how it could be improved to strengthen our brand DNA. We ultimately came to three conclusions: 1) the current design is important, 2) when new menu items are added we should take old ones off, and 3) we must respect our base (wings, ribs, burgers, and salads) while continuing to find new and creative items that loyal Lubies would enjoy. Certainly the outcome of this discussion was important, but what was extremely gratifying was the interaction and exchange of ideas that took place among all parties. This is key to successful relationships.

Additionally, WYSIWYG—“what you see is what you get,” a term that became popular in association with the original Apple computers because what you saw on the screen was what printed out on

paper—is another important leadership trait we all try to exhibit at The Lube. By displaying commendable WYSIWYG qualities, we are creating a more open, honest work environment. Operating in this manner allows us to get more done, make smarter decisions, and build trust among one another.

Today, Quaker Steak & Lube has become one of the fastest-growing restaurant chains in the country, and has won hundreds of national and international awards for our wings and more than 20 different wing sauces. Further, we are rapidly expanding and are thrilled to be in a position to double our 50-unit footprint in the near future. This would not be possible without our franchise owners and Lube team members working closely together to grow the brand and provide the best possible experience for current and future guests.

**Scott Iversen**  
Director of Marketing  
Toppers Pizza



When it comes to communication, no two brands are the same. While some of their technologies (extranet sites, social media footprint, advertising strategies) might align, communication is not a one-size-fits all box. Communication, though, is critical for success. It is the most crucial beginning to any process, whether brand, franchisee, or customer. Communication is where first impressions are made and, hopefully, last.

When it comes to communicating our brand, we take a very open approach, from our messaging to advertising to PR

to social footprints. Toppers focuses on talking *with* the end user, not at them. This form of communication has led to strong unit-level economics, including average annual gross sales per unit of \$932,761 and an average per-unit net profit of \$131,341, as reported in our Item 19. We have achieved strong sales through our brand communication, as we focus on building loyalty among customers. The way our brand speaks sets the tone for the way we communicate with our franchisees: frequently and honestly.

With our franchisees, we walk a fine line of communicating, in that we don’t want to over-communicate, yet still provide them with strong tools to be successful. Toppers does have the benefit of operating restaurants corporately, so we can test communication processes with our managers and leaders and judge their receptiveness to ideas and methods.

One strategy we have implemented is a quarterly marketing kit, a deep document full of every marketing initiative we have scheduled for the next quarter, from the way we speak with our customers to our social promotions to our advertising collateral. All information is in one document, neatly organized to provide ease of understanding for our franchisees.

Setting up our franchisees for success with proper planning then translates to our customers. We are proactive in our communication and give the customer plenty of time to prepare for their Toppers experience. For instance, we have built a strong following on our Facebook Fan Page (we have more fans per location than any of our big box competitors) who patiently await our Toppers Tuesday specials, a socially promoted deal on our slowest sales day, used to reward our customers with an additional opportunity to enjoy our product as well as a way to increase our system-wide sales on a slow day.

Communication is key to our success, from restaurant to website to socially to marketing. Consistency of message and not overcomplicating our message is exactly what our brand delivers and our franchisees and customers desire. ■



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# Social media

BY MELINDA CAUGHILL

## The Three C's of Social Media

Finding the perfect blend of customer, content, and channel

*In social media, just because you can doesn't mean you should.*

**Y**ouTube, Pinterest, Facebook, Google+, Twitter, StumbleUpon... the sheer number of today's social media channels can make a marketer swoon. Add the burden of creating unique content to engage with the right customers at the right time—while still managing all the other responsibilities of one's job—and you'll have to pick your poor marketing professional up off the floor. How can anyone manage in today's monstrous social media landscape?

First, start by acknowledging that no one can do it all. Even for brands as large as Coca-Cola and Apple, there are simply too many social media channels for one company to create meaningful, engaging presences on all of them. And more important, nor should you.

If you strip away its shiny new exterior, at its core social media is just like any other marketing strategy. This means that to get the ROI you need, some channels are going to work better for you than others. And, frankly, some channels, even if they're the hottest thing going, just aren't going to work for you at all.

So before you jump on the bandwagon of the latest social media channel, make sure that the cart is heading in a direction that will take you toward your marketing goals. You can do this by determining your unique mix of the "Three C's": customer, content, and channel.

### Customer

The best marketing strategies start by understanding the customer. The same is true with social media—if possible, even more so.

For example, if you own a pool installation franchise, you already know your ideal customer lives within a 50-mile radius of your showroom, is married, and has children between the ages of 4 and 24.

However, for your social media strategy, you don't want to stop there.

Let's say you learn that your pool customers are also very likely to be boosters of local high school sport teams. Now, instead of being a nameless company that sends out junk mail,

you can become an active part of an online community that shares scores and highlights of recent games, promotes team fundraisers, celebrates collegiate drafts, etc.

The bottom line on social media is that it's more important than with any other marketing medium to be able to answer the customer's question, "What's in it for me?" To be able to answer that meaningfully, you have to know your customer better than you ever have before.

### Content

The best content for your social media strategy isn't dictated solely by your customers. It also has to be right for your brand. But what kind of content is that?

To answer this question, start imagining your brand as an actual person. What kind of personality traits would that person have? What topics of conversation would he like talking about? What would endear him to others?

For example, let's say your company, ABC Tax, provides personal tax preparation services. If ABC Tax were an actual person, he'd be a confident, competent, yet friendly sort of guy. He'd be the type you'd trust to go through all of your personal finances, then hang out with you at the neighborhood picnic.

Once you've personified your brand, it becomes much easier to create content with a consistent tone of voice and, in turn, build a successful social media presence. For ABC Tax, the social media content strategy would help the average person understand complicated tax rules and regulations, while throwing in the occasional plug for a community event or local hotspot.

### Channel

Even with a great strategy, clearly identified customers, and quality content, it can still be very difficult to gain traction in social media. Don't make it even harder by posting your content where it doesn't belong. Instead, take the time to determine which social media channels are best suited to *your* content and *your* audience.

For example, if you have a lot of video content, make sure the channel (or channels) you choose makes it easy for your target audience to both find and view your movies. YouTube, Vimeo, and Vidler might be good places to start.

Finally, don't limit yourself to just the household names like Facebook, Twitter, LinkedIn, and YouTube. Depending on your content and your goals, a smaller niche site might be the perfect place to engage with your target audience. Sites such as social-networking.findthebest.com can help you find social media channels that might be a good fit for you. ■

**Melinda Caughill** is partner, Strategic Marketing at Third Person, Inc., a marketing, advertising, and web design company based in Milwaukee. Contact her at [melinda@third-person.net](mailto:melinda@third-person.net) or 414-221-9810 x302.



## Don't Be Afraid

Tame tomorrow's technology today!

**C**omputing in the cloud, mobile applications, and near field communication (NFC) have many IT people losing sleep at night trying not only to figure out what's happening with these technologies, but also how to keep up. Changes in technology and how consumers use it are so overwhelming and fast-moving that many companies are paralyzed and not doing anything. And it is fast-moving:

- Among the approximately 314 million people in the U.S., about 90 million smartphones are in use, plus another 17 million tablets.

- At the end of 2011, more than 45 percent of adults in the U.S. were using mobile devices for Internet access. By year-end it will be 70 percent, and if your target is teens and young adults it is even higher.

- The average smartphone user spends upwards of 60 percent of their time on the phone searching the Internet or using apps—*not making calls*.

Pretty impressive numbers... enough to scare anyone about the potential benefits and the effort needed to achieve them. But there really is nothing to be afraid of. What I tell our clients is that this is just another coat of paint on technologies they already are using.

**1) The cloud.** You have been using what we now call "the cloud" for more than 20 years—for email, file sharing, video conferencing, and a host of other activities we take for granted. Most notably is how the cloud is changing POS: you can now very cheaply run a fully functioning cloud-based POS system for a franchise chain with a tablet, printer, and cash drawer. Hardware costs a fraction of what you are used to paying, and software updates to meet compliance standards or add new features

can be automatically pushed down to the tablet. Plus, reporting is a breeze.

**2) Mobile.** People have been doing mobile business forever, but had to return to their offices to complete their daily tasks. We now can do all that and more through mobile devices in the field. Loyalty programs have also benefited from mobile. We used to mail postcards or email our loyal customers with offers or updates. Now we can instantly send messages to their phone (which they are never without) with special offers to come in, or while they are in the store making purchases, and to make program updates. And customers can order goods and services directly from apps on their phone, without having to enter the store or restaurant.

**3) Near field communication.** NFC is simply a way to communicate a piece of information from your phone or tablet to another party to achieve something you want. NFC will be big in POS for tap-to-pay, loyalty programs, and to track purchase history. You will begin seeing more membership-type companies use this so members don't have to carry a card to participate. Some figures to consider:

- 93 million smartphones with NFC were deployed in 2011, 183 million will be deployed in 2012, and more than 300 million are likely in 2013;

- 100 million people used NFC last year, a number that should more than double in 2012; and

- 12 percent of all smartphone users have already paid for something with their phone—more than the populations of NYC and LA combined.

My point is: Don't be afraid of this technology. Chances are you have been using parts or all of it for years. It is just being enhanced with new terminology to make it sexier. The biggest

mistake I see being made by franchisors is *they are attacking all of this in separate silos within the organization*. Operations may be looking at the reporting, IT at the POS, and marketing at the loyalty aspects. However, these departments are not talking to each other, so organizations end up with a hodgepodge of technology that does not communicate for maximum benefit.

When we meet with clients, we try to get stakeholders from all of these departments together in a room so we can discuss how each affects the others—with the goal of creating a system-wide program that aligns all of them into a single strategy ready for execution. Here's one way this could work.

Imagine you're in the mall, your phone buzzes with an offer from your favorite store. When you enter the store, the sales clerk's tablet buzzes, alerting them that you're there. A list of your previous purchases appears on their tablet, as well as any other information you might have provided, such as for a loyalty program, birthdays, anniversaries, etc. The sales rep now has the ability to offer specific items you might be interested in based on your previous purchase history and can offer incentives to purchase more, based on meeting tiers in your rewards program.

When the merchant has all its customers' buying patterns in a searchable database, it can help them make marketing decisions at the chain or the unit level; buying decisions based on sales trends; and site selection decisions based on tracking where their customers are actually coming from—not to mention the huge uptick in sales all of this will accomplish. That day is today... so get on your way (sorry Dr. Seuss, I couldn't resist). ■

**Tom Epstein** is CEO and founder of *Franchise Payments Network*, an electronic payments processing company dedicated exclusively to helping franchisors and their franchisees improve system performance, increase revenue, and reduce expenses. Contact him at 866-420-4613 x1103 or [tomepstein@franchisepayments.net](mailto:tomepstein@franchisepayments.net).





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# Cardlytics' rewards program opens new channel to marketers

Through innovative campaign technology, Cardlytics builds highly targeted banking rewards programs that provide retailers with a positive, measurable ROI. "We have opened up an untapped digital marketing channel, bringing timely, relevant offers to banking customers," says Scott Grimes, CEO. "As a result, response rates from our programs are 50 to 100 times higher than average for digital media."

Cardlytics' platform will reach more than 75 million households by the end of Q3 2012.

Whether consumers use a debit, credit or prepaid banking card, that transaction data is captured by the bank. Cardlytics enables the bank to present relevant offers based on a consumer's transactions. When the consumer shops in a store or online and the transaction posts in their account, the reward is shown in their online and mobile bank statement.

"A bank or credit union can provide these rewards at no cost, and the merchant gets highly efficient access to exactly the right consumers at a low cost," Grimes says.

The Cardlytics multichannel platform can extend offers through the breadth of the bank's digital channels, including SMS, email, mobile, ATMs and social networks,

as well as online banking. Cardlytics offers 100 percent pay for performance. No ad fees are charged until a customer makes a purchase.

Consumers love the program because of its ease and convenience:

- Offers show in the places consumers visit and are loaded to their preferred payment vehicle of choice
- Rewards are automatic with no coupons to print or codes to enter
- Relevant offers are based on their shopping habits
- Moderate users see savings of up to \$200 per year, with no limit for active users
- Offers appear in a safe, secure environment

## How it works

1. Cardlytics enables advertising offers inside bank accounts.
2. Retailers can run offers in consumers' transaction statements targeted against actual debit/credit card purchases.
3. Customers see offers on their bank accounts and click to activate them.
4. Rewards are applied automatically when customers shop using the debit, credit or prepaid card associated with the account.
5. Cardlytics tracks and reports all redemptions—whether online or in-store.

Consumer targeting may be based on ZIP code, store name, store category, purchase frequency or amount of expenditure. "We can provide a level of targeting that's simply not available in other channels," Grimes adds. "One incentive could be given to those who have shopped recently, and another to customers who haven't made a purchase in the past six months. Loyal customers could receive an offer after every third or fourth purchase to reinforce that behavior. There is a wide range of options—each with a clear measurable result."

## Unsurpassed Campaign Measurement

With Cardlytics' platform, marketers can quickly analyze the success of offers and refine and redeploy the most effective long-term campaigns without the time and expense typically involved with traditional direct programs. With Cardlytics' Test vs. Control methodology, merchants have the ability to monitor customer spend before and after the campaign, measure revenue lift, compare cost per acquisition and understand the long-term value of new customers.

## Direct View

For the CMO, Cardlytics provides a direct line of sight from the click to the retail purchase—solving one of today's biggest marketing challenges. "With our ground-breaking technology, we are the first digital channel to directly measure the correlation between an online promotion and an actual purchase in a brick-and-mortar store," Grimes explains. "Marketers need to know their online campaigns are driving increased offline sales, and now we can provide the data to prove it."

Founded in 2008, Cardlytics will soon reach more than 75M+ households through 300+ banks and credit unions. "They simply turn on our technology to enable offers to their customers," Grimes says. "We don't touch any sensitive consumer information, which remains in the bank's secure data environment."

For more information, visit [www.cardlytics.com](http://www.cardlytics.com)



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5/10/2012	CHECK	CHECK #127	CLR	\$420.00		\$959.81
5/10/2012	CHK CRD	MONDO BURGER #42 5814	CLR	\$10.13		\$949.68
<b>New Offer!</b> Click for 15% Cash Back at Torgy's Taqueria!						
5/12/2012	CHK CRD	KROGER 725 PON 541	CLR	\$21.36		\$928.32
5/12/2012	CHK CRD	CHRIS' BAR-B-QUE #534254	CLR	\$98.18		\$830.14
<b>Active Offer!</b> Click to earn rewards from Rod's Ribs						
<div><b>Rod's Ribs</b> Earn 5% cash back on every purchase from Rod's Ribs. Maximum reward is \$10. Offer ends 6/15/2012. Click the blue "See More Offers" button to see all your offers and earn rewards. <a href="#">SEE MORE OFFERS</a></div> <p>FI Bank Rewards Program, <i>get inspired, take charge, earn cash!</i> Offer is valid only with Your FI Bank Visa® CheckCard. Earned rewards will be paid within 60 days.</p>						
5/12/2012	CHK CRD	BOULEVARD FOOD 5542	CLR	\$30.06		\$800.08
5/13/2012	CHK CRD	FRESH 2 ORDER MA 541	CLR	\$27.67		\$772.41
5/13/2012	CHK CRD	ROD'S RIBS 725 PON 541	CLR	\$21.36		\$751.05
<b>Rewards Earned!</b> Congratulations, You Earned Cash Back						
5/14/2012	CHK CRD	CAMELLIS 725 PON 4411	CLR	\$7.28		\$743.77

# Connecting with customers

BY JACK MACKKEY

## Music to their Shears

Rock the Cut promotion pairs Supercuts stylists with “indie” bands

**C**heryl and Joey Robinson operate 35 Supercuts locations in the Los Angeles area. Cheryl represents their company, Sapphire Ventures, on the board of the Supercuts Franchise Association (SFA). Together, they led the production of a terrific SFA conference to introduce “Rock the Cut,” a new marketing campaign that touches Supercuts’ customers in multiple ways.

By now, you’ve probably been exposed to Supercuts TV spots that pair indie bands like Vintage Trouble with Supercuts employees. Candid rehearsal shots and live concert footage are mixed in with images of band members interacting with stylists at Supercuts. “You have a pride in the way you step out into public, especially when you have a good haircut,” says Ty Taylor, Vintage Trouble’s front man, in one of the 60-second spots. “You’re going to leave looking like a rock star,” promises Supercuts hairdresser Diana.

Supercuts is working to connect with customers by affiliating with some of the hottest emerging artists, including Vintage Trouble, DJ Ken Loi, Laura Bell Bundy, and Gold Motel—all part of Supercuts’ Artist Ambassador Program. More than 600 local and regional bands and artists are involved in the program. What does that mean to customers of Supercuts?

Gabriel Beltrone from *Adweek* explains. “The featured bands are tasked with promoting the brand on major social sites like Facebook, Twitter, Tumblr, Foursquare, and Pinterest.” Collectively this social media effort touches 4 million loyal fans of the artists with the goal of transferring some of that loyalty to Supercuts and “molding fundamentally countercultural artists into a small army of corporate endorsers,”

according to Beltrone.

Check out the music discovery and social media website ([rockthecut.supercuts.com](http://rockthecut.supercuts.com)) to see the wide range of free cuts of downloadable new music. The music, and the website, are also promoted through iHeartRadio and through tie-ins with ESPN X Games and Live Nation. The campaign parallels the musicians’ passion for music with the artistry and level of attention that Supercuts offers. This strikes me as a stroke of genius!



Jerry Conner is a member of the account team from Element 79, an agency in Chicago, who works with the SFA. While he is justifiably proud of the agency work, he made a profound observation: “After all of the advertising, the promotions, the social media, and the other out-of-salon enticements, the brand is ultimately delivered in the salon. Making the customer experience the best that it can be is the holy grail.”

To put it another way, you can market all you like, but people believe what they experience. And they believe what their friends experience. And they even believe what strangers say online about what they

experienced. So if a Supercuts stylist can go beyond providing a great haircut and bring the Rock the Cut experience to life in the salon, there will be many customers who will become promoters of the Supercuts brand because of how they were treated. And those fans who leave not just looking good but feeling good about themselves and about being part of a countercultural movement—which let’s admit, we all remember that feeling from our youth—will use social media to chime in and talk about why they think Supercuts is so cool.

Of course, people don’t talk about ordinary experiences. People only talk about what is remarkable. With fresh music from 600 indie bands playing in their salons and on Internet radio, Supercuts has ensured that they will have a steady supply of music that is new and different and special and exciting. They are creating the environment and the musical context to deliver on the brand promise in each salon.

So it has to be an exciting time to be a stylist at Supercuts. They are the ones charged with delivering the Rock the Cut experience in their salons. And they are the ones who are featured in the ads, right along with the indie band members. They are the co-stars of the Rock the Cut campaign. They have to feel excited, feel some sense of ownership in this updated version of the brand promise. When you give your employees a sense of purpose that is bigger than the tasks they perform, you unleash a new level of engagement across your organization.

Imagine what happens when a customer comes into a Supercuts now. They see the posters of their favorite new bands, hear the music playing on Internet radio, and they are greeted by stylists that they have heard the band members rave about on the TV spots. What a great starting position from which to connect with customers by saying, “Welcome to Supercuts!” ■

**Jack Mackey** is vice president and chief evangelist for SMG, a worldwide customer experience management firm that improves performance for multi-unit companies. Request a complimentary copy of *Five Things We Learned from Talking to 500 Million People* at [www.smg.com/research](http://www.smg.com/research).



**“My goal is to be as clear as possible with each candidate. Transparency and communication are synonymous. Throughout the life of a franchisee, nothing is more important than communication.”**

— Jenna Barber, Director of Franchising, Nothing Bundt Cakes Enterprises

# Grow

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## **Challenge the Pros 45.**

“How is the trend toward transparency and increased disclosure helping you to increase sales leads, quality, and deals?”



**“We’ve always believed that candidates should have all the information necessary to evaluate the opportunity.”**

—Lori Merrall, National Director of Franchise Sales,  
Massage Envy Spa

## **Sales Smarts 46.**

Crafting an effective multi-unit expansion strategy

## **Market Trends 47.**

Thank the banks! (What?)

## **It’s Closing Time 48.**

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## How is the trend toward transparency and increased disclosure helping you to increase sales leads, quality, and deals?

**Lori Merrall**  
National Director of Franchise Sales  
Massage Envy Spa



Massage Envy Spa has always been transparent when it comes to sharing its franchising opportunity with prospective franchisees. In our FDD Item 19, we include average unit volume and year-over-year growth numbers that provide candidates with the means to clearly evaluate our financial performance. While the FDD is readily available to anyone interested in learning more about Massage Envy Spa, we also ensure that some of these key evaluating factors are present in all of our marketing materials.

Massage Envy provides its regional developers, who are actually recruiting franchisees for their territories, with a multitude of marketing tools they can use for recruitment. These materials are available through a proprietary Intranet site and are customizable. Our messaging regarding the reasons to invest, AUV, etc. are consistently highlighted in all of these materials. We provide print and online advertisements, email blast templates, direct mail letters, brochures, and press release templates all containing key messages outlining our franchise opportunity.

In addition, our franchising website goes beyond the typical franchising information and includes testimonials, a line-by-line table of the investment and typical expenditures, and a detailed map of opportunities available in each state. We've always believed that candidates should have all the information

necessary to evaluate the opportunity to ensure it's a good fit for them and to form expectations that are based on hard data.

Increased disclosure also ensures that we are attracting the best possible franchisees. By sharing financials, the profile of a successful Massage Envy franchisee, and what the franchisee can expect in their investment, we enable them to determine earlier in the process if this franchise opportunity is the right one for them. In today's competitive and often challenging economy, it's important to spend less per lead and ensure your marketing dollars are reaching the right prospects. The days of casting a wide net are over, and targeting candidates with the right data and message points will lead to better, more qualified prospects who are ready to join our system as a successful franchisee.

**Jenna Barber**  
Director of Franchising  
Nothing Bundt Cakes Enterprises



At Nothing Bundt Cakes, we believe that transparency in the sales process inspires trust. Our franchise website clearly shows the candidates what they will need to qualify for ownership. This allows them to prequalify themselves before even talking to me. From the very first phone conversation, I am honest with them and promise to not always paint a rosy picture, but a realistic one. I set very clear expectations of roles and the process from the beginning. For example, when I set an appointment I keep it and

am always on time. They can count on my commitment to guiding them through this giant decision.

The sales portal that we use is new to the candidates, so I take the time to walk each one through it for clarity so they never feel insecure in the process. This also helps me to gather the compliance documents I need in a timely manner. This technology and these efficiencies make us very credible and impress the candidates.

The information provided in the sales process comes from a detailed script that is consistent for every candidate. This consistency ensures that our message is communicated equally and never compromised. Candidates also have access to our executive team members in each department for additional questions in the sales process.

In disclosing franchise candidates, I make sure to point out our Item 19 and encourage them to have the document reviewed by a franchise attorney if they would like. I also make it clear that we do not negotiate our document at the time of disclosure so they aren't surprised by this when it is time to sign a franchise agreement.

During the sales discussions, I make sure not to make any false promises such as growth availability if that won't be an option. And when they go through validation, they are provided contact information for all franchisees that are open, not just those listed in the FDD. We also provide suggested validation questions to candidates specifically targeted toward franchise support services. This makes them feel again like we have nothing to hide.

We also direct candidates to research us on Yelp. The feedback there is straight from our guests' opinions, and we can't manipulate those reviews. It helps them to see unedited positive feedback from our customer community as a validation tool.

Overall, my goal is to be as clear as possible with each candidate. Transparency and communication are synonymous, and throughout the life of a franchisee, from beginning to end, nothing is more important than communication. ■



# Thinking Multi-Unit

## Crafting an effective sales plan

**M**ost franchise systems organically grow a single-unit owner into their first multi-unit owner without having proper systems or training in place for multi-unit operators. They are (or become) reactive, rather than starting out of the gate with a multi-unit strategy. This is an organic growth curve that occurs in most franchise systems, as long as its unit economics are strong and the concept can operate through qualified managers. Reactive growth needs to be managed early in the lifecycle of your franchise system.

Single-unit franchise systems with hands-on operators who do very well with one location, however, will have a struggle with expansion. In a majority of these cases, the franchisee and franchisor will see reduced sales in the original unit because they are not prepared to operate through managers. And, with expansion capital at a premium in most cases, reducing the operating capital of Unit 1 to open Unit 2 will be a challenge for both franchisee and franchisor. Here are five critical questions to ask yourself:

- 1) Is my franchise concept the right model for multi-unit ownership?
- 2) Do I have systems in place to support multi-unit owners?
- 3) Have I operated multiple company-owned units as a franchisor?
- 4) Is my FDD prepared correctly to offer multi-unit and area development?
- 5) Am I willing to commit the resources for this type of expansion?

As stated earlier, early multi-unit owners at most franchise concepts were single-unit owners who succeeded with their original unit and expanded. When this growth starts occurring in your system, it is a good indicator that your brand has the potential for multi-unit expansion.

Once you've committed to grow the system through multi-unit expansion, you have a "game plan" that is proactive. Once

you've re-engineered your operating, support, and training programs, you can start creating profiles and qualification systems to attract the right multi-unit owners for your brand. In several cases, the POS system will not integrate with multiple stores and does not have the capacity to handle the reporting needed for efficient operations. Once you've confirmed you have the resources and systems in place, the next step is to disclose those new systems in your FDD—not write an FDD and make the system fit it.

**1) Preparing and launching a multi-unit program.** Your FDD is the starting point and roadmap that will guide your program. Since qualified, experienced multi-unit operators want to be able to discover key facts quickly, and either engage or move on to another concept, your FDD becomes one of your primary sales tools and information centers for them. Most multi-unit candidates will research concepts much differently than single-unit candidates, and most likely will not follow the sales processes you've used in the past.

Generally, after initial conversations, they will request a current FDD. But because the sales process is completely different for experienced franchise buyers, the FDD must be buttoned up tightly so they can gather information quickly and discover the multi-unit benefits you've added—and see that you understand and are committed to multi-unit owners and expansion.

**2) Franchise development marketing.** It's likely your company website, brochures, and communications with candidates are created to attract single-unit owners. Making changes to attract multi-unit operators is a critical step that some franchise companies do not want to take because of the cost, or because they are concerned about losing the candidates they are currently attracting. To work with multi-unit owners, it is imperative to cre-

ate the proper materials and systems or all your investment in changes will not be portrayed correctly. You have to talk the talk and walk the walk! Connecting the dots from the FDD to the execution of documents is critical.

**3) Profile the best multi-unit owners you can.** Understanding the profile of your successful multi-unit candidate is a key to success. Selling to unqualified multi-unit owners who fail or don't open the required stores will only squelch your development efforts down the road because of the resulting challenges and validation calls with the wrong owners. Don't compromise in this area. This is the foundation of the plan that will move your system forward.

**4) Finding the right candidates.** Multi-unit marketing is a science, not a mass marketing effort. Once you've identified the profile of the right candidate for your system and the markets to develop, you are ready to assemble a marketing plan. Working with consultants and a franchise marketing or advertising agency with success in multiple-unit sales and area development is the key. Funneling your leads into professionally conducted webinars online, with professional landing pages specific to the targeted lists, has been an effective method of screening and qualifying.

Advertising avenues are widespread, and vary depending on the concept and the target markets. Here is a partial list of activities and marketing ideas: targeted email lists; multi-unit owner conferences; direct mail lists; other multi-unit franchisees; email and direct mail lists; and print (local/regional newspapers and magazines, and trade magazines).

• **Slow and steady.** This is not a quick process. It will take most companies about six months to pull together all the different components needed to be successful in a multi-unit expansion plan. Once this has all been completed, you can expect to attract around 5 to 8 qualified multi-unit owners who will purchase from 3 to 5 units each. If you can get those owners' first units open and start construction on the second in the next 12 months you will be well on your way to building a strong foundation for future expansion.

Happy Selling,  
Marc

BY DARRELL JOHNSON

## Thank the Banks! (What?)

Winning the competition for credit

**T**here's a game changer coming to franchising, and the lending community is to thank for it. While it's hard to thank banks for the financial mess they created a few years back, capitalism is built on creative destruction, and what was destroyed within the banking industry is how they evaluated credit. They got it wrong, some banks failed, many businesses and people suffered, and banks now are starting to enter a new period where the old rules are being seriously revised.

As surprising as it may seem, this is a good thing for franchising and will be for years to come (until banks get carried away again and the cycle repeats). Here's how franchising is beginning to win the competition for credit.

We're now in the second phase of a small-business credit recovery following the financial meltdown of 2008. The first phase began in 2009 and lasted until 2011. From the lending community's perspective, that period is best described as the "Don't Lose Money" phase. The easiest way not to lose money if you are a bank is not to lend it. A more technical description is that banks between 2008 and 2010 could not properly value their asset portfolios because of market uncertainty. Therefore, they and their regulators could not determine whether the banks had adequate capital reserves. If banks were unsure of capital reserve needs, they certainly weren't going to expand portfolios.

The second phase started a multi-year transition away from "Don't Lose Money" to a focus on earnings as portfolios get cleaned up and capital reserve levels become clearer. There's no immediate rush to make money, but the most significant way banks make money is to put loans on the books. Most banks are flush with cash and have the same miserable returns on short-term investments that we all have.

In 2012, we all have been seeing a return to lending, but only to the lowest-risk borrowers. So far, pricing for different levels of risk isn't happening. Higher-risk loans just aren't being made at any price. When we see evidence of interest rate differentiation and term structures for different levels of small-business loan risk, we'll be moving into the third and final phase of lending recovery. That's another few years down the road.

What does all this have to do with how franchising is gaining a competitive advantage in the competition for credit? A lot. Here's why. Business lending is all about assessing risks related to the borrowing company's future performance, the management team responsible for making the business work, and the industry dynamics where the company is operating. The better the information about each of these risk categories, the more comfortable a lender becomes about answering a simple question in credit committee: "What's the probability we'll get our money back on the terms we're considering?"

*Here's where franchising is going to become a sustainable, distinct asset class for the first time in the history of small-business lending.* A lender considering a loan request from an independent business can assess risk only four ways: that company's business history; some general industry statistics (which is why SBA data, despite often being very inaccurate is often used); the bank's own portfolio experience (assuming they have any with a particular industry or brand); and a gut feeling for the people signing on the loan application. In this second, current phase of lending recovery, the lack of confidence in these risk assessments leads to a lot of the conservative lending we are all experiencing. Yet franchising has something huge to add: performance history.

Franchising is built on uniformity and conformity. If a lender can look at the right types of credit performance history of a brand, that lender has a much more confident answer to the question of whether they will get their money back. Bank Credit Reports answer that question, and in doing so change the small-business lending game in favor of franchising—not because all franchise brands are lower risk, but because franchise brands can show exactly what risk they represent to a lender. That has never been done before, and it is the game changer.

Of course, lenders need easy access to Bank Credit Reports, FDDs, and other underwriting information, and now they have it. More than a year in development, with input from franchisors and lenders under the auspices of the IFA and the Consumer Bankers Association, the vastly upgraded Franchise Registry is housing underwriting information on thousands of franchise brands, all of which is available to lenders only. What some have dubbed franchising's unfair competitive advantage in the competition for small-business credit is happening.

And this is just the start. The Franchise Registry, in addition to putting all this underwriting information alongside the simplified and improved SBA franchise loan documentation tools, is adding business development tools for all conventional as well as SBA lenders to screen franchise brands based on lender underwriting criteria—and, even better, to evaluate and connect with prospective franchisees during the franchise development process. This will align the lending process much more closely with the franchise development process. I'll explain more on that unprecedented set of capabilities in a future article. All these developments initiated in the second half of 2012 will demonstrate to everyone how franchising is winning the competition for credit. ■

**Darrell Johnson** is president and CEO of FRANdata, an independent research company supplying information and analysis for the franchising sector since 1989. He can be reached at 703-740-4700 or [djohnson@frandata.com](mailto:djohnson@frandata.com).

# It's closing time

BY STEVE OLSON

## Closing More Deals... Faster

Why not start now?

**U**nless you recruit only experienced franchise operators, most of your candidates have never bought a franchise and really don't know how. They're intelligent prospects, but unintelligent buyers who don't understand the decision-making process for purchasing a franchise. They make wrong assumptions, anticipating you'll divulge all the facts when they contact you so they can determine if your opportunity is "the one" for them. Logically, they want earnings claims and answers to all their questions now. To make matters more difficult, these first-timers fall prey to the mountain of overwhelming public information, often receiving conflicting advice from blogs, social networks, chat rooms, newspapers, and broadcast media; as well as from personal and business friends, fathers-in-law, accountants, and other armchair advisors.

### The challenge

Here's your question: When speaking with today's uninformed or misinformed buyers, how do you 1) effectively engage a prospect, 2) steer them onto the right road to investigate your business, and 3) quickly gain their confidence, credibility, and trust? How do you keep them focused and disciplined as they explore your franchise offering? Minimize broken appointments? Avoid distractions and false objections? Prevent sidetracking assignments and commitments? Eliminate stall tactics in making decisions and moving forward?

### Pre-close prospects up front

When you receive a completed application, review with your prospect their information, ask and answer related questions, and make them feel comfortable. Then

set expectations and the ground rules for your franchise investigation process. You take the lead or they will! Execute this properly, it's smoother sailing for you and the candidate. Here's a successful five-point presentation for pre-closing during the application stage.

**1) Define your role.** *"My role is to educate you about our franchise, and explore this opportunity with you to see if we're the right fit for each other. This is a franchise partnership, and we're interested in candidates who can be successful, satisfied owners. I am not here to sell you. My responsibility is to facilitate the investigation process. Our executive review committee makes the decisions on offering our franchises to qualified candidates."*

This helps puts your prospects at ease in knowing this is a mutual decision that has to work for both parties.

**2) Introduce the review committee.** *"If you want to be considered for our franchise after completing our investigation process, you'll attend discovery day and meet our review committee, which awards our franchises to qualified candidates."*

This builds the credibility and importance of your approval system for screening qualified buyers.

**3) Require open and honest communications.** *"Any time in the process you have a question, concern, or want to stop, let me know! Just 'wave the red flag' and we'll address the issue. Out of respect for you, I will do the same. If this franchise isn't the right one, we certainly don't want to waste each other's time. Does that make sense?"*

This rule allows you to directly confront and "straighten up" or disqualify prospects who make excuses or break appointments.

**4) Agree to a time frame for decision-making.** *"Candidates we work with*

*decide within five weeks whether this is the franchise they want and are ready to make a commitment. Can you?"*

Most prospects agree to this timetable, since it is logical and they have no reference point on how long it should take.

*"Okay, now moving forward we'll schedule conference calls that work for both of us in our investigation."*

Prospects are looking for this guidance to decision-making, which you have just defined with a specific timetable. Disqualify individuals who can't commit to an acceptable decision time. If it's a military person considering a franchise down the road, ask them to contact you three months before their discharge. Or place them in a future follow-up file. Too much can happen in between for them to be classified as "a prospect."

**5) Summarize your process and franchise purchase.** *"We have five steps for exploring our franchise opportunity to determine if we are right for each other. These are the Application and Program Review, which we are conducting today; Franchise Disclosure Review; Franchisee Validation; Discovery Day; and Awarding of the Franchise. Discovery Day is the meeting at our headquarters, at which time you'll visit with our support team, tour our operations and local franchise locations, and get final Committee Approval for securing the franchise. Does this investigation process make sense for you?"*

Most systems award the franchise after discovery day, while others award the franchise and sign agreements at the event. It can work well either way, depending on how you set expectations and what's most effective for your development program.

### What are you waiting for?

If you're not using a pre-closing process, definitely try it out! It may make the difference between celebrating another franchise sale—or commiserating another loss. ■

*This article is an excerpt from Amazon.com best-seller Grow to Greatness: How to Build a World-Class Franchise System Faster by Steve Olson. For ordering information, go to [www.franchising.com/specials/growtogreatness.php](http://www.franchising.com/specials/growtogreatness.php)*



# JOHN C. MORGAN BRINGS LAUGHTER, INSPIRATION AND MOTIVATION AS PRESIDENT GEORGE W. BUSH



**An Interview with Dina Dwyer**  
*Chairwoman and CEO, The Dwyer Group®*

**Paul Moore:** "This is Dina Dwyer with The Dwyer Group, a very gracious lady that we met tonight. She hired "W" for their Annual Reunion. Dina, did you enjoy having "W"?"

**Dina:** "He was amazing. It was just so much fun for me to look out into the audience of about fifteen hundred people, to see the look on their faces as he walked onto the stage, to "Hail to the Chief." It was like a look of awe, and then they were grabbing their camera and taking pictures. It was just amazing. I expected the best, and he gave us the best."

**Paul:** "Do you think anybody believed it was him?"

**Dina:** "Yes, I'll bet a good ninety percent, again just looking at their faces, I'd bet a good ninety percent believed it for at least the first three or four minutes."

**Paul:** "What kind of an impact do you think he had as he milled around with folks?"

**Dina:** "You know it's amazing, I think he made people feel very special. There's something about being around someone who looks and acts like a President giving you one on one personal attention, and I think he made a positive difference in a lot of lives today. They're still talking about it. And then the laughter, I think it's so positive for people to laugh and he had them just laughing and really enjoying themselves."

**Paul:** "Now you've met the real President, right?"

**Dina:** "Yes I have I've met president George W. Bush."

**Paul:** "Wow, so this was special for you to have him here today?"

**Dina:** "It was just terrific, and they're a lot alike; really nice guys, funny, but down to earth."

**Paul:** "Would you recommend people hiring him for their event?"

**Dina:** "I would highly recommend hiring John Morgan for any event that you have. He will accommodate you no matter what it is. Whether it's a banquet, because he also performed at our banquet, or an opening session, a business meeting, a church meeting, he can fit any agenda that fits with his standards."

**Paul:** "Thank you Dina."

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