

**THE PEOPLE ISSUE**

# Franchise Update **2014 Q3**

BUSINESS INTELLIGENCE FOR LEADING FRANCHISORS

**Lead!**  
*Creating a culture of accountability*

**Market!**  
*The power of fact-based marketing*

**Grow!**  
*10 commandments for explosive growth*

## Tune Up Your Team!

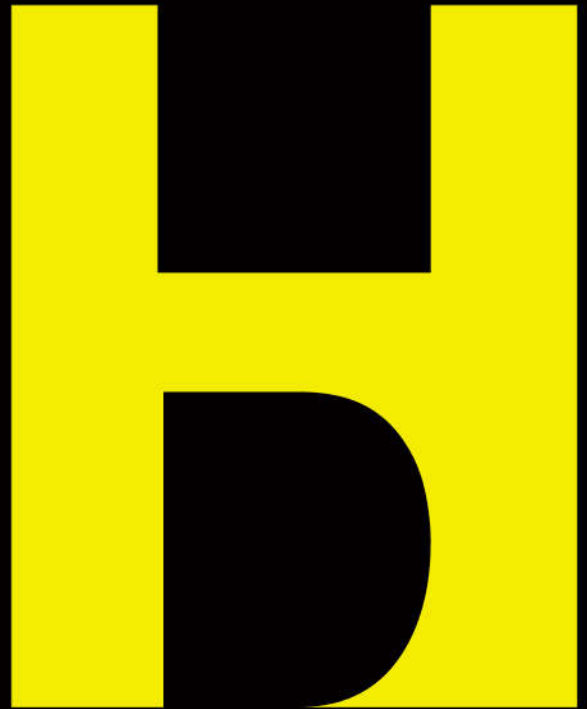


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LEADERSHIP & DEVELOPMENT  
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**FOUNDATIONS FOR GROWTH**

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# Franchise update | Q3

BUSINESS INTELLIGENCE FOR GROWING FRANCHISORS



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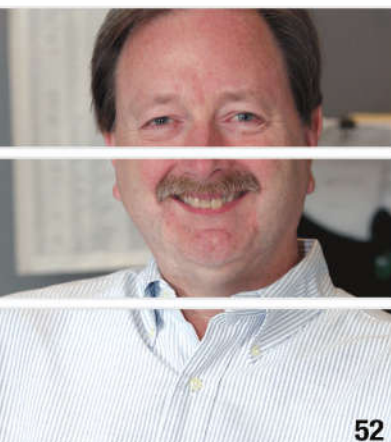
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*Dan Fields, FocalPoint Coaching*

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BY KERRY PIPES

## The People Factor

In the midst of preparing this issue, I had the opportunity to attend our annual Franchise Consumer Marketing Conference in Atlanta. It was the event's fourth year and you can read more about it in these pages. I'm always amazed at the level of the content presented throughout the conference. It's high-quality stuff through and through, and attendees consistently tell us they leave with great new ideas and strategies they can't wait to try out when they get home.

A great as the content of the conference is each year—thanks in large part to our wonderful volunteer Advisory “Power Board” of franchise CMOs and marketing executives—it's always the caliber of the people who come to this conference that amazes me most. Whether it's the speakers, panelists, vendors, or attendees, the people at this conference represent the best of the best in franchising. How perfect that as we were working on an issue focused on the theme of “people,” we had the privilege of spending several days in Atlanta with some of the best people in the business.

Yes, the focus of this conference is always on consumer marketing, but that focus is meaningless without the hardworking, talented individuals who create marketing plans, develop the necessary strategies, and implement the initiatives and campaigns that help the best brands continue to grow. Great people—from the C-level down to the front line—make

great brands.

Whenever I sat in on sessions or visited with attendees in the Expo Hall, I found myself surrounded by engaged, intelligent, passionate people who have been through the fires and experienced the ups and downs of success and failure. Most significantly, I always find them eager and willing to share their experiences with their peers. And when I speak with my

**Great people—from the C-level down to the front line—make great brands.**

peers outside of franchising, they find it amazing too. It's good to step back now and again to appreciate the collaboration built into the franchise business model—the camaraderie and openness unique to the franchising community. I call it the People Factor.

I see the same kinds of things from our writers, guest contributors, and the people we interview. They are passionate about franchising and want to share their enthusiasm and knowledge with others. From the leadership of Wingstop's CEO Charlie Morrison and Jackson Hewitt's CEO David Prokupek, to Dickey's Barbecue Pit's Chief Brand Officer Christie Finley's passion to grow the brand and Keith Gerson's fervor for creating a culture of accountability, all are excited to be doing what they're doing and are willing to take the time to tell our readers all about it, freely offering up their invaluable perspectives and the lessons they've learned.

Again and again in the franchising community, it all comes down to the People Factor. ■

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# Lead

Franchise leadership and management



## 10 CEO Profile: David Prokupek

*JACKSON HEWITT* #2 tax service tries harder

## 16 CEO Profile: Charlie Morrison

*WINGSTOP* Building a billion-dollar brand

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## 26 Feature: Anatomy of a Brand

The new Old Chicago: repositioning is a journey

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Creating a culture of accountability

## 29 Human Resources

Boiling business down to 6 key concepts





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**Satmetrix propels growth at the franchisee level.**

### OWNERS

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- ✓ Benchmark performance for continuous improvement

**Satmetrix propels growth at the corporate level.**

### FRANCHISORS

- ✓ Obtain a steady stream of valid data for strategy and decision support
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Greg Meyer, Director of Market Research, Anytime Fitness

**Anytime Fitness** is #1 on Entrepreneur magazine's 2014 Franchise 500 List. In a marketplace crowded with competition, Anytime Fitness uses Satmetrix to keep in constant close touch with what keeps members coming back.

“Not many franchise systems are both as large and as flexible as Anytime Fitness. If Satmetrix can work in a franchise system that has more than 2,300 plus locations across 14 countries, it can work for anyone.”

Anytime Fitness uses Satmetrix to stimulate cooperative competition that elevates the brand. “Because a member of one club has access to all other clubs worldwide, every club has some stake in the performance of all the others. Sharing Net Promoter scores promotes a mentality of a rising tide lifts all our ships,” says Meyer.

“SATMETRIX IS A TURNKEY SYSTEM THAT OFFERS A LOT FOR THOSE WHO WANT TO GET A LOT OUT OF IT, BUT IT ALSO WORKS FOR THOSE WHO PUT NO EFFORT INTO IT, AND THAT'S WHAT'S GREAT ABOUT THE SYSTEM.”

Courtney Carrasco, Director of Marketing & Communications, ShelfGenie

**ShelfGenie** is building a brand in a new business category. To do that, the company needs insight into the customer experience and the true drivers of satisfaction.

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“The social media aspect of Satmetrix really sold me on getting this launched. While I'm investing to get survey results, I know that the same software is helping us spread the word, getting the word out there amongst people who trust each other,” Carasco says. “This is vital to our success.”

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## Up for the Challenge

Jackson Hewitt's new CEO prepares for takeoff

BY KERRY PIPES



**D**avid Prokupek is not short on experience at the highest level. What's more, he loves a challenge. He has spent more than two decades as a CEO, investor, and board member helping build, finance, and advise high-growth businesses in the consumer, retailing, financial services, marketing services, and communications industries. He hasn't just done these things, he's done them well.

Today he is president and CEO of Jackson Hewitt Tax Service, a full-service tax preparation and related financial services company. He previously served as CEO of Smashburger, and was managing partner and chief investment officer of Consumer Capital Partners, which provided Smashburger with its initial \$20 million-plus of funding.

Prokupek is an innovative and strategic thinker who can manage the business today while keeping his finger on the pulse of trends that will help him be successful tomorrow. He says he relishes being in the "challenger position" and knowing his brand must work harder and smarter than the competition does.

And that's exactly what he's been doing at Jackson Hewitt, and why he says

<b>Name:</b> David Prokupek
<b>Title:</b> CEO & President
<b>Company:</b> Jackson Hewitt, Inc.
<b>No. of Units:</b> 6,600
<b>Age:</b> 52
<b>Family:</b> Wife and two daughters
<b>Years in franchising:</b> 9
<b>Years in current position:</b> CEO since March 2014

there's change ahead for the brand—and he aims to be the driving force behind the company reaching its goals.

“You will see us re-launch the brand, jump-start our footprint growth, launch innovative products and services, including more mobile solutions, and begin a refresh of our existing locations,” he says of the brand’s impending initiatives.

**LEADERSHIP**

**What is your role as CEO?** I view my role as setting the strategic direction and vision for the company and to build our talent bench to navigate the ever-changing landscape. I need to manage the business today, but spot the trends that will allow us to be successful tomorrow. A big part of my role is to be the “chief revenue officer” and “chief culture officer” of the company, helping inspire others to achieve greatness.

**Describe your leadership style.** My style is to work from the big picture and create a strong vision of where we want to be as a company and our path to success. In my current role, I am using more of a pace-setter style as we position the company for growth and the re-launch of the brand and related products and services. I enjoy working at a fast pace and have the organization make decisions quickly. I am collaborative in style and encourage our senior leaders to have a firm grasp of the hard and soft sides of their businesses. I like to celebrate wins broadly and create a culture that works and plays hard.

**What has inspired your leadership style?** I have worked with challenger brands most of my career, which has always inspired me. I am inspired by being in the challenger position and knowing we have to work harder and smarter than the competition does. I have been very fortunate in my career and have been inspired by a number of very successful leaders.

**What is your biggest leadership challenge?** One of the biggest challenges in leading organizations—especially for

companies in transition—is getting buy-in on the vision and alignment across the organization on key measures of success and encouraging the risk-taking to bring the vision to life. We will be pivoting from a pure seasonal “in store” tax preparation business to a company dedicated to the year-round tax, healthcare, and evolving daily financial needs of hard-working Americans. The new vision is exciting as we launch a broader suite of online, mobile, and storefront products and services, as well as reposition our footprint to be even more convenient to our customers. Getting everyone to pivot simultaneously will be a big challenge, but I am confident we will meet the challenge.

**How do you transmit your culture from your office to front-line employees?** Culture starts with a vision and a purpose that is well communicated and has broad buy-in across the company. I use a variety of ways to transmit our culture that starts with energizing the team around our “true north,” setting incentive systems that reward our values and regularly recognizing people, holding “town hall” style meetings to share ideas, giving people the freedom to express the culture in their own way, and personally modeling the attributes we care about as a company. As we grow, who we hire plays a big part in transmitting the culture and encouraging those who are not a good fit to leave. In retail, culture really starts at the front line with the customer, so I spend tremendous time with our field and store management around both consumer and business goals and what we want the experience to feel like for customers. I believe in being transparent with our results up and down the organization and trust good people to do the right thing every day. Culture cannot rest with a single person. If it is working right, a strong culture shows up in your customer engagement every day.

**Where is the best place to prepare for leadership: an MBA school or OTJ?** I don’t think there is one best place to prepare for a leadership role. Both OTJ and school are important.

You certainly don’t need an MBA to be a great leader, but a good MBA program teaches the importance of collaboration, analytics and trend-spotting, and communication. What an MBA misses, OTJ adversity and the school of hard knocks teaches in spades as valuable leadership lessons, especially around leading and managing a diverse set of people. In the end, I believe leadership is best learned from a solid mix of mentorship, education, and OTJ experience. I recommend that aspiring leaders prepare to be a leader at a young age by volunteering for leadership roles whenever and wherever they can and modeling the traits of great leaders they encounter in their life.

**Are tough decisions best taken by one person? How do you make tough decisions?** Fundamentally, someone has to make the tough decisions, and the best leaders have the courage to make and communicate those tough decisions. However, as I said earlier, one of the biggest challenges is to ensure that everyone is working toward a common goal. Therefore, while leaders ultimately make the tough calls, the decisions need to be properly socialized with the senior team so that they understand how the decision was made and why it is important that everyone support the decisions.

**Do you want to be liked or respected?** It’s human nature to want to be liked, but real performance comes when a team respects its leadership for who they are and what they believe. I try to spend my time earning the respect of the team and integrating diverse ideas, which drives engagement and commitment throughout the organization. I find that with respect, the ability to be liked is much easier.

**Advice to CEO wannabes:** The first thing I would advise a future CEO is to study other CEOs—find ones that you admire and model yourself after them. Second, I would suggest getting experience making tough decisions, whether balancing revenue opportunities and cost constraints or dealing with

employee performance issues. None of this comes easy without practice. Last, I would say that a current leader who wants to be a CEO should think about the bigger implications of their decisions and factor in how any decision may affect others in the organization. Start to act and conduct yourself as if you are a CEO, which means balancing decisions across all constituencies, not just your function or team.

## MANAGEMENT

### Describe your management style:

I would describe it as results-driven, a “best ideas, best team” approach to winning at business. Personally, I start with the big picture in mind and use a healthy mix of wisdom, data, and courage to make decisions. Like a coach who wants the best athletes on the field, I want to have the best, highest-caliber leaders on our team. I look for high-impact people and reward and recognize their accomplishments.

### What does your management team look like?

I joined Jackson Hewitt earlier this year and continue to build out our management team with high-impact “A” players. Our managers, depending on their particular function, will have a mix of people and critical reasoning skills with the ability to roll up their sleeves and drive results. Our field managers have a heavy mix of operation and execution in their DNA, think regularly about what is right for the customer, and understand their numbers. I look to put high-caliber people in stretch roles, and am comfortable with many managers being in a role for the first time.

### How does your management team help you lead?

They help in carrying out our vision and reinforcing where we are heading as a company, and in driving the team toward our key goals. My managers are also an important sounding board for me and a great source of feedback on the mood of the organization, which provides me with insight and helps me adjust where we are heading, if necessary.

### Favorite management gurus: Do you read management books?

I read more books earlier in my career. Today I spend time reading about leading thinking and theories on strategy, execution, and marketing in the *Harvard Business Review* and *McKinsey Quarterly*. I enjoy reading books by respected people who have made real transformations or built great things, like Howard Schultz’s *Onward: How Starbucks Fought for Its Life without Losing Its Soul*.

### What makes you say, “Yes, now that’s why I do what I do!”?

I would say winning and taking on complicated problems. I enjoy cracking the code on complicated issues like innovation or driving the organization to be disruptive. I enjoy change and new challenges because they provide the greatest opportunity to make a difference. I also enjoy teaching people. I have a number of young managers and I help them achieve by putting them in stretch positions.

## PERSONAL

### What time do you like to be at your desk?

Between 7 and 7:30 every morning.

### Exercise in the morning? Wine with lunch?

I am an early riser. I am awake between 4 and 4:30 a.m. because I exercise for 60 to 90 minutes every day. I then catch up on emails before leaving for the office. Lunch is usually around a conference room table, so I save the wine for dinner.

### Do you socialize with your team after work/outside the office?

I am a firm believer that regularly breaking bread is an important aspect of business. I look to get together outside the office either as a team or on a one-on-one basis with my direct reports. I also try to do things they like to do as well.

### What technology do you take on the road?

I am a gadget guy. My two devices of choice right now are my iPad mini with a Zagg keyboard and a Microsoft Surface Pro 3 tablet. I also just switched from a BlackBerry to an iPhone 5.

### How do you relax/balance life and work?

Daily exercise is a big part of how I relax. I really enjoy cycling and love to cook and collect wine. Spending my weekends with family and friends helps me find a balance of work and my personal life. However, I have been a big owner in the businesses I work in, so I find that work and personal life do meld together.

### Favorite vacation destinations:

I am a big skier, so Vail and Aspen are favorites. When not skiing, I enjoy spending time in Costa Rica and Napa Valley. I also love visiting big cities, including London, Paris, and New York.

### Favorite occasions to send employees notes:

I send handwritten notes regularly. I send a note to new employees when they join the company. I also spend a fair amount of time in the field and send employees notes to highlight great things I see and learn.

### Favorite company product/service:

I am proud of all our products and proud of the service we provide our customers every day.

## BOTTOM LINE

### What are your long-term goals for the company?

We are a challenger brand in a competitive industry. Our main goal is to grow our #2 position in the tax preparation industry, as well as extend the brand into an important part of our customers’ lives on a year-round basis in financial services, healthcare, and related tax services. Over the next few tax seasons look for us to jump-start our footprint growth in a variety of venues including Walmart, traditional storefronts, and mobile/temporary locations. We are developing an innovation pipeline of products and services that will allow us to be more mobile and digitally enabled. Most important, we are becoming more central to our clients, hardworking average Americans, through our financial services focused on our [prepaid Visa] card, which allows customers to spend and earn, save for the future, repair and

build credit, and protect their families. The growth opportunities in front of us are quite exciting for our corporate and franchise partners.

**How has the economy changed your goals for your company?** We want to be competitive in all economies, and since taxes are required we are less economically sensitive. However, the rapid change in the economy to a mobile and digital one is affecting our business model. Our customers want the expertise of in-person tax preparation with the convenience of doing their taxes whenever and wherever they want. We need to rise to that challenge and move to the cloud and a mobile-enabled approach to business. Our current plan is exciting as we embark to be everything our customers want us to be.

**Where can capital be found these days?** Capital is abundant today. You can argue there is even too much capital looking for good ideas. We are fortunate

to have a great partner in H.I.G. Capital and the support of strong bank partners. However, we generate approximately \$500 million in system-wide sales, we are profitable, and we have a capital-light business and growth plan with approximately 80 percent of our locations franchisee-owned.

**How do you measure success?** Success in an organization comes in a lot of flavors, so there are a number of ways to measure it. We use balanced scorecards to balance our financial success, our consumer success, and our execution of key initiatives. How our customers feel about us and engage is an important indicator of our current and future success. I focus on execution and alignment of goals. Our ability to execute on our plans is a good barometer of our success. I believe it is important to reward people for a job well done.

**What has been your greatest success?** I am fortunate to have had a

number of great accomplishments in my career, and I am proud of them all. If I had to name one, I am proud of the startup and successful growth achieved at Smashburger. It has been a big commercial and consumer success, of which I am very proud.

**Any regrets?** I've had a great career, so I am very happy with where I am in life. The only regret may be that there is not enough time. There are so many things to do and experience, and I regret there is not more time to do them all.

**What can we expect from your company in the next 12 to 18 months?** In the coming months and years you will see us re-launch the brand, jump-start our footprint growth, launch innovative products and services, including more mobile solutions, and we will begin a refresh of our existing locations. I am excited about all the great opportunities and challenges that are ahead. ■



## Bottom Line Results.

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## Building a Billion-Dollar Brand

Wingstop's global growth appears to be unstoppable

BY KERRY PIPES

**C**harlie Morrison wasn't looking for a new opportunity. He was already at the helm of Pizza Inn and was the driving force behind the brand's innovative Pie Five concept. But in June 2012, he couldn't turn down the opportunity to take the reins at Dallas-based Wingstop, which he says offered him the chance to run a larger, growing company in an expanding market space.

Wingstop now has more than 650 restaurants worldwide and signed commitments for more than 500 more, the most in the brand's history. In 2013, the

**Name:** Charlie Morrison

**Title:** President and CEO

**Company:** Wingstop

**No. of Units:** 650-plus

**Age:** 46

**Family:** Married, 4 children

**Years in franchising:** 20-plus

**Years in current position:** 2

company notched its 10th consecutive year of same-store sales increases (9.9 percent), and domestic AUV rose to \$974,000.

"In fact, over the past 2 years, our same-store sales have grown 23.6 percent," says Morrison. "That is almost unheard of in the fast-casual segment and certainly for chains our size, and we expect the strong momentum to carry forward this year."

Morrison has spent more than two decades in the restaurant industry. Before taking over as president and CEO of Wingstop, he led Pizza Inn for 5½



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years. Before that, he was president of Steak and Ale for 2 years, and previously held management positions at Kinko's, Boston Market, and Pizza Hut.

Wingstop is part of Roark Capital Group, the Atlanta-based private equity firm that owns dozens of franchise brands including Massage Envy, Auntie Anne's, McAlister's Deli, and Schlotzsky's. Morrison says Roark's approach to partnering allows him to call the shots, drive the strategy, and define the growth plan for the brand.

One of the things that has excited Morrison at Wingstop is the opportunity for international expansion. So far, the brand has crossed borders to Mexico, Russia, Singapore, the Philippines, and Indonesia, and has plans to enter the United Arab Emirates.

This summer, Wingstop opened the first of 50 planned locations in the Philippines and the first of 100 planned for Indonesia. Add close to 100 new restaurants the company projects to open this year, and Wingstop is on pace to set yet another record for growth. But it's what happens past opening day that keeps the business humming.

Morrison knows that for a brand to have continued success it must offer its franchisees ongoing and consistent corporate support, marketplace differentiation, and sales momentum. As the company celebrates its 20th anniversary this year, Morrison is not only looking back at where the brand has come from, but also ahead to where it's going.

"We will continue investing in our brand and in technology to make our brand more accessible to our guests and our operation even easier to execute for our franchisees," he says. "If we do that well, we will have no problem becoming a billion-dollar brand."

**LEADERSHIP**

**What is your role as CEO?** To set the vision for our company and shape the strategy that achieves that vision.

**Describe your leadership style.** Open, honest, straight shooter who leads by example and challenges the status quo.

**What has inspired your leadership style?** All of my experiences in my career, watching people and modeling what to do and avoiding what *not* to do.

**What is your biggest leadership challenge?** Today it is being a change agent in a company that has had many years of industry-leading success, yet needs to adapt to the demands of being a billion-dollar brand.

**How do you transmit your culture from your office to front-line employees?** Leading by example. Not being afraid to jump in and work in any situation. I always strive to be genuine and real at every level of the company.

**Where is the best place to prepare for leadership: an MBA school or OTJ?** There is no substitute for being in the middle of a real-life scenario in business. You cannot model in a classroom all the possible downstream challenges we face every day in business.

**Are tough decisions best taken by one person? How do you make tough decisions?** I strive to bring as many people as necessary into decisions we make. It depends on the decision. We work to make every decision with clarity, not certainty. There are rarely opportunities to make a decision with complete certainty, and trying to do so leads to paralysis for the company.

**Do you want to be liked or respected?** Both. You can achieve both if you are transparent and balanced in your approach.

**Advice to CEO wannabes:** Take the time to learn the business inside and out. Don't assume you know it until you roll up your sleeves and work every aspect yourself so you have an educated perspective to work from. Get to know people at every level of the organization and establish relationships. The best feedback comes from the front line.

**MANAGEMENT**

**Describe your management style:** I work collaboratively with my team.

We work together to define our strategy. Then I empower them to implement, and get out of their way. I also try to be out in the business rather than in my office, traveling to visit our franchise partners and see the business operate.

**What does your management team look like?** It's a typical structure, with senior leaders in each discipline of operations, technology, development, marketing, finance, supply chain, and international.

**How does your management team help you lead?** We lead as a team. We work together to make decisions, and most decisions are made by the group. This approach allows me to get a variety of perspectives on issues and sharpens our decision-making.

**Favorite management gurus: Do you read management books?** I'm a fan of Patrick Lencioni's leadership fables. David Novak's *Taking People with You* is a great read too.

**What makes you say, "Yes, now that's why I do what I do!"?** On a plane, when someone asks me what I do and I respond, "I work for Wingstop" and they say, "I love that place!" Or when I search for Wingstop on Twitter and see how many people are anticipating an occasion with us after school or before a big game.

**PERSONAL**

**What time do you like to be at your desk?** Only when necessary.

**Exercise in the morning? Wine with lunch?** Coffee with my wife in the morning on the patio every day, rain or shine. Lunch usually with my team. Exercise comes with working in the yard and gardens with my wife.

**Do you socialize with your team after work/outside the office?** Yes. It's nice to unwind and have opportunities to learn more about the lives of your team.

**Last two books read:** *They Said It Couldn't Be Done* by Coach Bill Snyder, and currently *David and Goliath* by Malcolm Gladwell.

**What technology do you take on the road?** My iPad mostly, and laptop if I have a lot of work to do; iPhone and a pair of headphones for music and everything else.

**How do you relax/balance life and work?** Spending time with my family. Golf, fishing, hunting, gardening, beach, lake, lying by the pool—anything we can all be doing together.

**Favorite vacation destination:** Beach house in Seagrove Beach, Fla.

**Favorite occasions to send employees notes:** Every time I travel, I try to send a personal note of thanks to our field team and franchisees for all they do for our business and tak-

ing their time to help me understand the business better. I think handwritten personal notes go so much further than an email or text!

**Favorite company product/service:** Louisiana Rub flavored bone-in wings!

**BOTTOM LINE**

**What are your long-term goals for the company?** To become a billion-dollar brand. We know the objective and are well on our way!

**How has the economy changed your goals for your company?** We have weathered economic challenges well by keeping our offering and operation very simple.

**Where can capital be found these days?** For our business, just about anywhere. SBA or conventional loans are great resources for growth at Wingstop.

**How do you measure success?** Feedback from our franchisees and our team. Happy and engaged franchisees and team members will lead to success on the P&L.

**What has been your greatest success?** I have been truly blessed with a great career. I could not have done it without the best wife and family in the world supporting me all the way. I am a very lucky man.

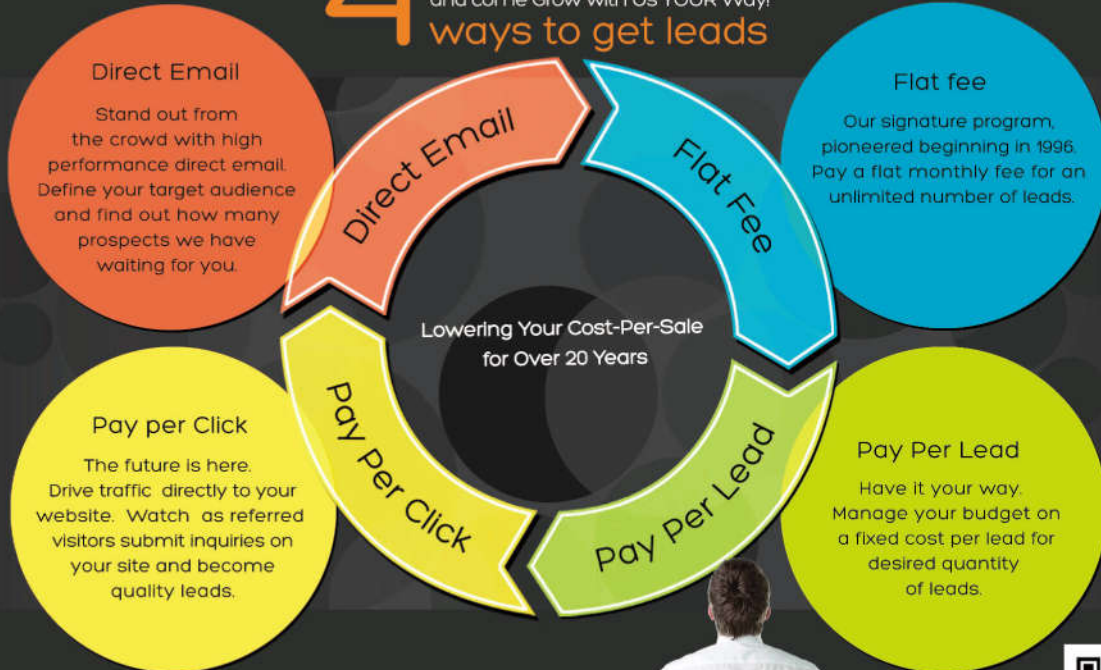
**Any regrets?** None.

**What can we expect from your company in the next 12 to 18 months?** You will see us open more than 100 locations per year, expanding beyond six countries into new international markets. We will deploy a new prototype restaurant and will continue to invest in technology to make our brand more accessible to our guests and our operation even easier to execute. ■



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## Company Bio

Working with over 750 franchise brands, Constant Contact provides you with the online marketing tools needed to connect with your customers. Maintain your brand, supply content, and track results at the national level while offering franchisees the ability to connect with their customers at the local level. Our tools and services will help you reach your goals and grow your business. And they're all backed by our award-winning support team, ready to help you anytime, at no extra cost.



## How Kampgrounds of America localized their Email Marketing Strategy

Kampgrounds of America, or KOA, has been offering a unique camping experience to families across North America for the last 50 years. Since its start in 1962, KOA has grown to over 475 campgrounds and 60,000 sites in the US and Canada. "As a franchisor, our job is to provide national marketing on a brand level while still giving franchisees the tools and training they need to grow and attract new customers locally," explains Polly Mulvaney, Director of Marketing Services for KOA. "There has always been a pent up demand for more affordable marketing services."

"We were familiar with Constant Contact but didn't realize that a program exclusively for franchises existed," says Polly. "What we found when we did some research was that the partnership with Constant Contact would have everything we were looking for—an affordable product with the education, training, and support to back it up."

KOA officially launched its partnership with Constant Contact in April 2012, after a successful test phase which included 15 of its franchise locations. Within the first six months of marketing this program, 66 of its franchisees had set up accounts to send email communications to their existing and prospective campers.

In addition to finding an email marketing partner that provided its franchisees with a tool to help reach new campers and strengthen ties with returning visitors, KOA has been able to overcome some of their biggest marketing challenges, both at the franchisor and franchisee level, since partnering with Constant Contact.

## Mastering communication and awareness

As a franchisor, Polly says that awareness and communication are always one of the biggest challenges of KOA.

"With Constant Contact, there's no reason why all of our franchisees shouldn't be taking advantage of using

email marketing," Polly explains. "The biggest challenge is always communicating that message to our locations."

To help KOA and its more than 475 franchisees get started with email marketing, Constant Contact put together a custom marketing plan that would reach all of the locations across North America. Through email communications, custom online training, and personal coaching by phone, Constant Contact is able to help each individual location to upload their list of contacts and to send a professional and effective email campaign.

Prior to KOA's 50th Annual National Convention, the Home Office provided Constant Contact the attendee list in order to set up a free trial for each campground owner. This enabled Constant Contact to co-promote a dedicated Email Marketing panel discussion at the event, and to meet with interested attendees and show them how to access their free accounts and preview the new KOA email templates.

## Maintaining a brand in the marketing wilderness

With locations across the US and Canada offering varied and unique experiences to all who stay at their sites, KOA was looking for a way to offer local marketing without undermining their national branding.

"It's crucial to us that we're able to protect the integrity of our brand while also offering our franchisees the flexibility to speak to their audience," says Polly.

To help KOA maintain the brand that so many campers have come to recognize, Polly worked with Constant Contact to develop custom templates designed specifically to meet the needs of KOA.

"For us, the templates are a way to not only control our brand, but also to make it as easy as possible for people to create and send emails," Polly explains. "The home office offers templates for those that declare themselves as less tech-savvy, or just want this done for them, as well as those with a bit more technical experience, who may want to customize more of the message."

## Tracking Results

In 2013 alone, KOA's franchisees have communicated with close to 1.5 million customers, with a 47% average open rate and 16.7% average open rate, and the success stories have been trickling in! One of those stories came from Aaron Williamson, owner of Lake Conroe KOA in Montgomery, Texas. One of the biggest weekends of his first season using email marketing, Aaron saw revenue increase by \$7,300 over the previous year.



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# CEO interview: Tariq Farid

## “With Success Comes Responsibility”

Tariq Farid's 15-year journey to 1,200 stores

BY EDDY GOLDBERG



**T**ariq Farid is an amazing guy. He's passionate about his employees, his community, his family, and his religion, and based on a 2½-hour visit with him at his Wallingford, Conn., headquarters, if there were an award for the Nicest Guy in the World, he'd be on the list.

His family moved to the U.S. from Pakistan in 1981, when he was 12. From humble beginnings, including his father working multiple jobs and the family not having enough to eat, today Edible Arrangements—the company he founded with his brother in 1999—has more than 1,200 locations, \$510 million in system-wide sales, and employs close to 10,000 people in 14 countries.

Great numbers, to be sure, and an immigrant success story well chronicled since Edible first took the franchising world by storm. In 2009, Farid was named the IFA Entrepreneur of the Year and the Ernst & Young Entrepreneur of the Year in the retail and consumer products category in Metro New York.

Since then, he's come through the recession, 3 years of a franchisee lawsuit, and started several charitable foundations. He says he could retire any time. Instead, he's embarking on several new ventures and expanding his existing ones.

Yet, he says, “This is the roughest, most difficult time of my business career.”

For Farid, this is a time of heady change. His brother and co-founder Kamran retired. In May, after several years of searching, he hired a new president. The company is expanding into China, opening 3 to 4 stores a month, with about 30 expected by year-end. He's added Edible To Go, offering smoothies and fresh fruit (including chocolate-dipped!) to bring more traffic into his



stores, and has started a business-gifting initiative. And he recently spun off Net-solace, the software company he started in 1999 (after selling his previous one to Teleflora).

Today he wonders if his longtime employees of 10 to 15 years are up for the organizational changes. “To do these things, we have to change here first, and first with me,” he says. Concerned about avoiding what he calls “1,000-store syndrome,” Farid says, “It’s so easy to coast. People have to step up.”

### Beginnings

The idea of fresh fruit basket arrangements is well accepted today, but when he took the idea to lenders 15 years ago, it was a very different story. “The first question always was, ‘Are you a restaurant? A food service? What are you doing?’ And I couldn’t really define what we were,” he says. “No one really does this,” bankers told him. Also, he had no money.

In 2000, Chris Dellamarggio walked into the store in East Haven, Conn. He’d seen a fruit bouquet at his mother’s house, loved the concept, and asked if he could open a franchise in Boston, where he lived. Surprised, Farid had the presence of mind to respond, “We’ve been thinking about franchising. Give me a few days and let me see what paperwork I need to send you,” he recalls.

“He used the word franchising. I had no idea about franchising. I’d never even thought about it.” At the time, he was trying to open his second store and was waiting for the loan to come through. All he knew about franchising was from when he was 16 and worked at a McDonald’s. When he was hired, he had to watch training videos for 5 hours a day. “You want me to watch videos and eat McDonald’s? I love it!” he says. “It was probably the best job I ever had.”

After Dellamarggio left, Farid hit the Yellow Pages and flipped to Franchising. He found one area listing: Michael Seid’s MSA, just up the road in Hartford. He called. Seid answered. An hour and a half later, after what Farid describes as a “most magical call,” the journey to 1,200 stores was under way.

“The magic was that he picked up the phone,” says Farid. “I still remember sitting in the back, working on making a fruit arrangement, putting the phone to my head and saying ‘I want to find out about franchising.’”

Seid told him, “Kid, I think you’re on to something, but you have to prove it out.” He advised him to build a few stores and stay in touch. Seid also told Farid to “keep going and I think you’ll



make something of it.” The best thing Seid told him, says Farid, was, “It’s really not complicated.”

Seid, he adds laughing, says he doesn’t remember the call, but it’s had a lasting effect on Farid. “The majority of things you see me doing now—giving to the IFA, veterans and education programs, my foundations—is because of what he did that day. I feel that was worth hundreds of thousands of dollars to me because he gave me the confidence I could do it.”

After that call, Farid told Dellamarggio that he’d get back to him in six months. He quickly learned all he could about franchising and started building his second store as if he were already franchising, taking careful notes on design, layout, paint, plumbing, floors, etc.

The next step in his journey came when he connected with a franchise consultant in Florida who told Farid he could produce all the necessary documents to get started for \$7,000. “I sat

in his living room for three days and wrote the UFOC there with him, chapter by chapter,” says Farid. “As weak as it was, I understood exactly what was in there.” He registered the first 10 or 15 states himself.

Soon after, at an IFA conference, Farid asked what he called a “dumb question.” Someone approached him afterward. He turned out to be Stuart Hershman, a franchise attorney with DLA Piper. “Let me look at your document,” Hershman said. Today, DLA remains his attorney. And in 2001, Dellamarggio became the first Edible Arrangements franchisee, opening in Waltham, Mass., just outside of Boston.

### One at a time

“When I started franchising, it was all about selling packs. Sales guys would sell territories,” he says. So at his first IFA conference, he sat in on a roundtable about growth through multi-unit sales. He had about 5 units at the time.

He was selling singles, but had sold 2 stores to a couple of franchisees, who he said dragged their feet on the second store. He asked the table, “What’s the success rate of these people opening the stores in a timely manner according to the contract?” The person leading the roundtable responded, “You wouldn’t ask that if you were in sales, because that’s where the money is.” Everyone else at the table was in sales, but they did open up to him, admitting that the success rate for second units was “pretty miserable.”

Farid went back to his office and decided to stick with his one-unit philosophy for his first 700 to 800 stores. Instead of selling multi-unit packs, he says, if he saw a franchisee doing well with one store, he would encourage them to open a second, and help them do it.

Over the years, this approach worked spectacularly: from 1999 to April 2008, no stores closed, zero. “People asked me how many stores I’d closed. I’d say ‘Closed? Why would I close stores?’” It took the Great Recession to do that.

“The reason we had our first closure in the heyday of 2007 and 2008 when things were on fire is my sales people

took over and sold some franchises to people that they shouldn't have," he says. "A franchisor's responsibility is to look out for the franchisees, because that's the protection of your brand."

### The IT factor

Farid says his early career in IT has played a big role in his success. "My growth has a lot to do with IT. In the '90s I had an IT company where we had a point-of-sale system and were doing IT for the floral industry. As soon I started Edible, I realized we needed an IT company and started one." It's called Netsolace, but the name may change: he's spun it off and moved it to Atlanta, with a plan to sell the technology to franchisors—and he's looking for a president.

When he started Edible, all the technology was built in-house. Everything was automated, from new store opening to royalty collection to having a website where 50 percent of the orders happened through the website. "I actually enjoy that more than anything. I love technology."

### The people factor

"When I got into franchising, I would reach out to people and ask, 'How do you manage the franchisees? How do you support the stores?' It was pretty amazing the kind of money you needed to run your organization." The biggest problem he found early on was "inconsistency in the people. Each trainer trained differently and each franchisee understood the directions differently—and the word that I remember in franchising was 'consistency.'"

The traditional path of hiring a consultant to write an operations manual and then depend on them to update it seemed costly and inefficient. "There are things changing by the minute, by the hour. How do we keep it updated? The cost of that is going to be crazy," he thought, so he turned to IT.

The first thing he created was an online operations manual, and then a help desk. Next, he created what he called the New Store Opening Kit. However, it didn't work as well as he'd hoped. "People would get ahead of themselves.

They hadn't even gotten their lease yet and would go to the chapter Buy a Car and they would buy the van. And I'd say, 'Why did you do that? You haven't even gotten a lease yet!' Then the franchisee would call me and say, 'You know my store's delayed in opening and I have to make my car lease payment.'"

Learning as he went, he says, "I had to create a new technology that I called New Store Management. According to the stage you were at, it only showed you the next step: Oh, you're looking for a location? Here's how you look for a location. As soon as the person found a location, it released the next chapter: now you need to find an architect and a contractor. Here are some names."

### 2007: First bump in the road

In 2006, Edible opened its 500th location. The next year, as the company convention approached, business was great. "We were building a lot of stores," he says, "but franchisees were starting to raise the issue that we were growing too quickly."

He says the brand was "totally in control," with all the stores opening on time and no problem opening new territories. But he took the franchisees' concerns to heart. "I started to take some internal pauses. We started to have a store on the radar that was going to shut down, and a few stores were having issues. I realized my sales people were getting ahead of themselves, and that as we were growing our checks and balances weren't that good."

He says some of those franchisees should never have been signed. "The issue wasn't that they had competitors and the competitors were eating their lunch. We were boarding weak people with weak resources, and the banks were giving loans to everyone back then."

At the convention, he told franchisees, "I think you have a valid concern when you're seeing that we're maybe growing too fast. My objective isn't to open a lot of stores, it's to have very healthy stores. I want the brand to last, and not be a flash in the pan."

At the time, Edible was selling 200 stores a year, he says. "We were very

careful about it. But the *perception* was that we were selling a lot—and we were," he says. "I said, no more. The focus is going to be back to the stores—to store comps, to building the stores, to solidifying the brand. My concept is going to be slow, steady growth. I have 800 stores now and don't have anything to prove to anyone any more, but I want the system to become solid," he says.

As it turned out, his choice to slow down sales couldn't have happened at a better time. "That was probably the biggest thing that happened to us from a blessing point of view—some good deed we did, I have no idea. The economy fell apart the next year. By then, we had already slowed down our development and were focused on the ones we were building. If we had sold another 300 stores, most of those people's financing would have fallen apart. They would have gotten in trouble."

He dialed the sales goal back to 100 to 125 a year. "And that is still the throttle now," he says.

### The lawsuit: 2010–2013

Despite the success the brand was having, in February 2010 Farid received a letter from the newly formed Edible Arrangements Independent Franchisee Association (EAIFA) complaining about certain practices and policies. The EAIFA represented about 170 franchisees.

"It was really at a wrong time because it was the best years at our company," says Farid.

The letter listed 6 areas of concern: expanded hours (especially Sundays), the EA Connect program (a centralized call center for ordering), the EA website, advertising funds (national TV, promotions, discounts), vendor agreements, and competition from corporate stores. The letter said the association was ready to litigate, but "our first resort is to attempt to facilitate a just, equitable and fair resolution that is in the best interest of all parties."

Farid says he was always willing to sit down and discuss the complaints, and that all the changes were made with the long-term best interests of the system in mind. "I always say that the franchisor

needs to look 5 years ahead of where the franchisees are,” he says. “If you’re doing the right thing and your focus is to grow the brand, there are going to be a certain number of people who are not going to understand.”

If he had to do it all over again, “I would do it no differently,” he says. “In the beginning people came to me and said, ‘Look do you really want a lawsuit?’ The last thing you ever want is a lawsuit with your franchisees. So I reached out to them and asked, ‘Won’t you get all 200 people together in a room and let me sit down and explain to you, and you explain to me how I could do it differently?’”

He said that if they could explain how to do things differently, he would do it that way, but he saw the changes as the best course in an evolving marketplace. “We saw the world was changing from a technology point of view: people were moving to mobile devices, people were moving to websites, traffic was moving a lot online,” he says. “We had to make

those web changes, we had to require the technology.”

Farid says he has no issue with the formation of an independent franchisee association. “I think franchise associations are probably the best thing that happened in franchising—as long as they’re focused on success of the franchise system. Even if they’re focused on *their* success, they’re the best things in the world. I sat there and said, ‘I encourage you, I will support you, I will even help you. But you’re not going to do it by telling me you can’t open on Sundays. So give me a solution. Customers are calling and asking for that.’”

Nevertheless, the EAIFA got legal standing and did file a suit—which it withdrew 3 years later, following a lengthy negotiation process. Nothing much changed, says Farid, other than Sunday being optional after 3 years of being mandatory. “If somebody wants to, they can request that and we *will* make an exception. That’s the only thing

we changed at the end of those 3 years. He says about a third of franchisees are now closed on Sundays. Looking back, he says, “It was an unfortunate incident, where to a point the lawyers took over a little bit on both sides.”

Looking ahead, Farid says he’s learning to be as passionate about his foundations and contributions to local organizations as he has been about his business. He’s focused on three areas: health, food, and education. He’s encouraged his franchisees to send surplus fruit to local soup kitchens. And beginning with Hurricane Sandy, he’s started a program where franchisees can request money to help an employee. “Within 24 hours a check will be FedEx’d out,” he says. “My mother used to say, ‘Do you want to feel great, honey? Go take care of someone.’” His long-term goal? To set up a charitable foundation that lasts long after he’s gone. That’s a legacy his mother—who taught him that “With success comes responsibility”—would be proud of. ■



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# The New Old Chicago

BY MIKE MRLIK

## TRANSFORMING A 37-YEAR-OLD BRAND

**I**n the restaurant world, if you survive 3 years, you have essentially beaten the odds. Before rebranding to Old Chicago Pizza & Taproom in 2013, Old Chicago Pizza & Pasta had a successful 37-year history that served three generations of guests. The neighborhood restaurant, founded by a few buddies in Boulder, Colo., steadily grew to 96 restaurants in 22 states.

The brand made a lot of loyal friends along the way, but though longtime pizza lovers enjoyed the familiar comfort of the traditional beer and pizza combo, the American food scene was quickly evolving. Diners were becoming more knowledgeable about food and drink, and they were hungry for more upscale options with an emphasis on artistry and a passion for all things craft.

In November 2010, Old Chicago evolved into part of CraftWorks Restaurants & Breweries, the nation's largest brewery restaurant. The timing was finally right for a brand refresh and repositioning.

Many companies completely lose their identity during rebranding, but our main priority was staying consistent with the genuine, likeable character that made Old Chicago great. It was essential to maintain close relationships with our fan base, but we were also ready to

attract a diverse group of guests with more sophisticated tastes.

### Brand repositioning is a journey

Our journey wasn't a sprint, but a marathon that demanded a balance between being patient and proactive. It took more than 2 years to carefully evolve our name, logo, restaurant design, server sequence, and menu.

While running our restaurants in the day-to-day, our team talked to longtime guests, one-time guests, and potential guests. We tasted a lot of pizzas, sampled amazing beers, and met with local and big-name breweries to understand the intricacies of how each individual beverage was meant to be presented, tasted, and savored.

To discover objective opinions on our brand's current style and future goals, Old Chicago used several resources in the refresh process: research and planning with leading business strategist Boston Consulting Group, consumer research and testing with Food Perspectives, concept and menu development with restaurant giant Lettuce Entertain You, and architecture and design advice from customer experience leader WD Partners.

### Quality, not just quantity

Old Chicago invested big in our multi-

million dollar refresh and repositioning, but the commitment to test and re-test is starting to pay off for us. The first restaurants to debut the revitalized concept in Minnesota and Colorado last spring enjoyed positive results and guest feedback. Sales and traffic goals have continued to meet our goals for these test locations for the first year, proving the rebrand is reaching different audiences while retaining longtime supporters.

In March of this year, the first restaurant representing the "new Old Chicago" design built from the ground up opened in Chapel Hill, N.C. The restaurant is a hit in The Triangle (Raleigh, Durham, and Chapel Hill) and will become a launch pad for Southeastern expansion over the next 1 to 2 years.

Guest responses are positive, and these beta test units and newly opened restaurants are meeting or exceeding projections with top-line sales performance. Our 36 franchised units are now preparing to remodel; they waited only because we wanted to test everything to ensure perfection before franchisees invested a dime.

Our commitment to craft philosophies extends beyond our love of outstanding food and drink. We aren't afraid to create a flexible, custom business model that

serves everyone with an interest in Old Chicago. Our brand is absolutely open to further franchising, but investment in corporate locations will continue because that's how much we believe in the new Old Chicago. Fifteen corporate locations are scheduled to open in the next year.

**“Good” is not good enough**

Our food was always good, but “good wasn’t good enough.” Old Chicago went from baking exclusively deep-dish pizzas to a signature Tavern Thin crust with dough made in-house every single morning from nothing but water, sugar, yeast, virgin wheat flour, and salt—no cut corners, just all-natural ingredients and the drive for perfection. Our classic deep dish is now the Chicago thick crust, a butter-brushed wheel of pure pizza pleasure.

Appetizers are shareable to bring people together at the table, and salads are substantial enough to be a stand-

alone meal. The menu of 40 new choices isn’t just “good.” We wanted them to be “craveable.”

Beer enthusiasts looking for a cold one will discover 36 brews on tap. Each undergoes a 10-point process to evaluate every component and ensure each delivery is a top product. Our certified beer servers are authorities thoroughly prepped to educate every guest on scent, taste, mouthfeel, and pairings. Glasses shaped for each style of suds are frozen, then spritzed with chilled water seconds before pouring to clear out any ice or dust inside the glass and keep every flavor at the forefront. Our European glass-washing system ensures that no two glasses are ever washed in the same water. We built relationships with the best local, national, and international brewers to deliver amazing handmade products that offer guests the freshest possible flavors of familiar classics, seasonal offerings, hard-to-find craft beers, and exclusive tappings made just

for Old Chicago.

Repositionings can easily derail, so we took our time to thoughtfully reshape Old Chicago. We kept what made the brand endearing, while introducing contemporary favorites that would please our forever-fans and draw the interest of first-time diners. By delivering a higher-end casual dining experience at a casual price point, we found common ground to please everyone. The restored restaurant is serving up an exciting era of good times around the table that will satisfy cravings for big flavors and warm communities. ■

*Mike Mrlik is the brand president of Old Chicago. He joined Old Chicago in January 2013 to help expedite franchise growth opportunities. Before that, he held operational, management, and growth-related positions at Bennigan’s, Fair Lanes Entertainment, Boston Chicken, New World Restaurant Group, and more recently was president and CEO of Mr. Gatti’s Pizza.*

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# The focused CEO

BY KEITH GERSON

## Creating a Culture of Accountability

Do you know what *your* goals are?

**A**s president of a leading franchise technology company, I'm afforded a unique vantage point as I get to study the trends, patterns, habits, and behaviors of hundreds of franchisors. Of all of the trends I'm seeing that can have the greatest impact on a franchise organization's success, it would have to be creating *accountability*.

Increasing your franchise sales output, improving unit-level economics, out-marketing your competition, or any of the other dozens of items that dominate franchise conference keynote addresses, panels, or training sessions tend to be lagging indicators. Substandard performance in these and most areas can most often be tracked back to an absence of franchisee and employee accountability. Having the best strategies, technologies, products, and systems means nothing if your team "can't knock down the pins" by accepting accountability for their actions. But that's almost impossible when employees and franchisees are uncertain as to what they are really accountable for.

In key studies on organizational change, FranConnect and Bain & Company reported the following findings:

- a staggering 81 percent of those surveyed said they were not held accountable for regular progress on the organization's goals, and that the goals were not translated into specific actions (87 percent had no clear idea what they should be doing to achieve their goals);
- only 15 percent could name even one of the top three goals their leaders had identified (the other 85 percent named what they thought were the goals, but that often didn't remotely resemble what their leaders had said);
- only 51 percent could say they were

passionate about the team's goals, leaving half the team simply going through the motions;

- 46 percent of franchisors don't have strategic plans in writing, nor are they shared with management teams;
- 25 percent do not have core values/vision/mission statements in writing, nor are they shared;
- 25 percent of franchise organizations are without detailed job descriptions; and
- 38 percent have no formal evaluation methods in place.

It's no wonder then, that the two most requested topics franchisors are seeking in a keynote or workshop are "franchisee accountability" and "engagement," according to Katrina Mitchell, CEO of Speak!, the leading speaking bureau for franchising.

### Case in point: Marco's Pizza

One franchisor I see looking past the symptoms surrounding subpar performance and focusing on root cause is rapid-growth franchisor Marco's Pizza, which has been working around the clock on creating a "Culture of Accountability." Jack Butorac, CEO and president of Marco's, attended a leadership conference in 2013 with top executives from some of the largest companies in the world. There he was asked, "How do you maintain your culture when you more than double your size in 5 years?"

After speaking with a number of the world-class companies that had successfully implemented similar programs, he reached out to the organization behind the *New York Times* best-seller *The Oz Principle*, and asked them to create a program to help Marco's maintain its culture as the company experienced

record growth.

Today, Marco's is 18 months into a 10-year commitment they've made around a total system program focused on creating a culture of accountability, which the company sees as its biggest competitive advantage. The goal has been to build a culture of accountability from the top down. So, in addition to rolling out the program to all of its corporate personnel, Marco's has included the brand's more than 8,000 employees. Within months, the brand was seeing significant results in store-level crew performance, store sales, profitability, and store counts.

One of the methods Marco's is employing is PEP rallies (Pizza Evaluation Process), daily and weekly meetings across the country where employees evaluate quality control of their baking and create a structured forum for exchanging feedback. Employees are recognized, coached, and motivated to focus on four key results: 1) PSI (product, service, image), 2) store sales, 3) EBITDA, and 4) new store openings.

To force accountability, many companies make the mistake of trying to change compensation and hiring systems. The philosophy of *The Oz Principle* has leadership changing the thinking and actions of employees through a culture of accountability. Then, together, they will create the systems at the speed needed to attain the desired team results.

One final thought: Culture change must be led. You cannot delegate the initiative to HR, operations, or anyone else. While these functions play important roles, the executive team must maintain ownership of the process and lead the culture change at every level of the organization, ensuring that the change effort is prioritized correctly at the top of every management team agenda. ■

**Keith Gerson** is president of global operations for FranConnect, a leading provider of franchise management systems, with more than 500 franchise brand clients and more than 70,000 franchise locations on its cloud-based platform. Contact him at [keith@franconnect.com](mailto:keith@franconnect.com) or 703-390-9300 x159.

BY BILL WAGNER

## Six Easy Pieces (In Theory)

Boiling business down to 6 key concepts

**T**here are no silver bullets, quick fixes, or easy get-rich-quick schemes. Like most entrepreneurs, I've tried them. I've read more than 200 business books in the past 20 years looking for that one idea that will help me grow my business, make life easier, more predictable, understandable, and more profitable. I've learned that business can be boiled down to only six concepts: Vision, People, Data, Issues, Process, and Traction.

Three years ago, a CEO friend of mine implemented the Entrepreneurial Operating System (EOS) developed by Gino Wickman. Since then, I've watched him grow his business while working smarter and enjoying greater life balance. His motivation was that he had hit the ceiling. He knew where he wanted to go but didn't have buy-in from his team. There was little cohesion and virtually no traction. He experienced recurring issues that were rarely solved, and he lacked a process that could be embraced and easily followed by all.

Within 2 years of implementation he achieved a stronger vision that *was* followed by all, traction that seemed effortless by comparison, and a healthy attitude that removed many of the entrenched attitudes that had stymied his growth. Here is how it all began...

He convened a number of one-day offsite meetings with the goal of clarifying, simplifying, and putting their thinking in a place to achieve their vision. One of their first goals was to determine the company's **Vision**, which included the core values that were most appreciated in the company. Some of the values they embraced were "hard working," "dependable," "strong work ethic," "innovative,"

and the ability to be "open, honest, and vulnerable." They spent much of the day discussing where they wanted to go, including a 10-year goal, a 3-year plan, a 1-year plan, and 90-day goals. Most important was that their direction was agreed upon by everyone.

**I've learned that business can be boiled down to only six concepts: Vision, People, Data, Issues, Process, and Traction.**

**People.** Second, they did an analysis of their leadership team. Did they possess these core values, or at least the most critical ones? Also important were the questions: Did each employee get it? Did they want it? And did each have the capacity to do their job? In essence, were they the right people for the right seat on the proverbial bus?

The third aspect of EOS is **Data**, which consists of 1) a scorecard and 2) having a number for all positions. The scorecard for many of our businesses entails line items such as revenue, sales, margins, lost time, days receivables, etc. We look at these on a weekly basis so we can take immediate and corrective action when the numbers are out of line. We focus on the future, as opposed to the past. Next, each employee must have a specific number. Two is the number of my receptionist: her goal is to answer the phone by the second ring. For my

director of business development the number is five: her job is to schedule a minimum of five prospect calls per week.

The fourth element is **Issues**. This is the ability to quickly and easily identify, discuss, and solve issues—once, versus discussing the same ones every month. It is essential for only one person to be responsible for an issue. When more than one person is responsible, no one is responsible.

**Process** is the fifth part. When my staff prepares me for a client presentation they follow a 27-step process. If one of my employees were to leave, whoever picks up the project will have a checklist to follow. It is also essential that the agreed-upon process must be followed by all—not by some, but all.

The sixth part is **Traction**, which consists of two elements. This is the execution component and consists of 90-day "rocks" (goals) and "Level 10" (L10) meetings. A rock is similar to written quarterly goals. A rock is owned by only one person. Each leader should have two to five quarterly rocks. These are similar to what Jim Collins referred to as BHAGs: Big Hairy Audacious Goals.

The second part of traction is the L10 meeting (because each weekly meeting is rated on a scale of 1 to 10, 10 being excellent). These meetings take place every week at the same time, are typically 90 minutes in length, start on time, finish on time, and follow the same agenda. Every week, each attendee says whether or not they completed their to-do list and their rocks. There is no discussion about the status or reasons things did or did not get done. All we want to hear is a yes or no, on or off track, complete or incomplete. It's amazing how peer pressure works. We hold each other accountable. ■

**Bill Wagner** is CEO of Accord Management Systems and an EOS Implementer. For the past 15 years he has assisted the franchise community with the people side of their business. If you would like to complete a company checklist to see where you stand, send an email with "Traction" in the subject line to [kim@accordmanagementsystems.com](mailto:kim@accordmanagementsystems.com).

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### 2014 KEYNOTE SPEAKERS

#### **Peter Sheahan**

Founder, CEO of ChangeLabs  
Author of *FLIP* and *Generation Y*



#### **J.B. Bernstein**

Legendary Sports Agent, Marketing Pioneer  
and Inspiration for the Disney hit film  
*Million Dollar Arm*

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**Greg Vojnovic, CFE**  
**Chief Development Officer**  
 Popeyes Louisiana Kitchen

WHAT  
 ATTENDEES  
 ARE SAYING...

"I enjoyed the conference. I think 2013 was my 8th. I liked this one best. I loved the theme, speakers and networking is always awesome. I always recommend this to my clients."

— Sylvia McAndrew  
*Sales Consultant*, Franchise Gator



# HELLO FELLOW FRANCHISE LEADERS!

This will be the 9th year that I have participated in the Franchise Leadership & Development Conference and I am honored that Franchise Update Media has asked me to be the Chairman of the conference this year. I've always felt that this has been the one conference where we can go to learn best practices in our industry; and probably more than any other single event has done more to raise the level of professionalism and success of franchising. To me, this one event is known more than any other for the amount of professional sharing and goodwill between top executives and the networking that results.

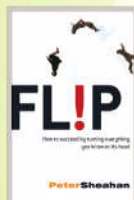
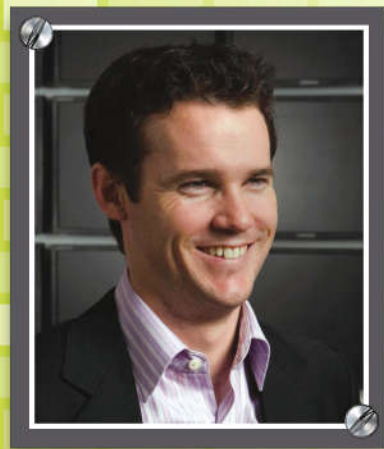
Based on all of your feedback, this year we're making some big changes at the Franchise Leadership & Development Conference and taking it to the next level. While the Franchise Leadership & Development Conference each year consistently presents the top breakouts for the Franchise Sales and Recruiting process, in 2014 we are expanding the scope of our conference breakouts to include what happens AFTER you've recruited a new franchisee. We have introduced a new set of breakouts focused on Market Planning and Development for long term successful growth of your franchisees. The top Development Executives in the industry will present these breakouts, and in the tradition of this conference they will all share their secrets to success. And then, for those of you with an emerging brand or a brand at a transition point, we have breakouts focused on Building Your World Class Brand. As you can imagine, all these breakouts will be presented by the best in the industry and you will have plenty of time to ask questions.

Another change this year is that we are taking a conference favorite and super-sizing it. The annual Mystery Shop/Annual Franchise Development Survey will be changed to provide a more in-depth look into our industry gold standard's survey, with a panel of franchise execs challenging the analysts who completed the survey each step of the way. And of course the conference returns with top notch keynote speakers and the one of a kind CEO Summit and opening Bootcamps. The "Maximize Sales Performance" or "Grow Successful Franchisees" tracks fine-tune your skills, followed by an afternoon session to "Position Your Franchisees For Success." If there is one professional development conference you are going to attend this year, I guarantee that you will get more out of this conference than any other.

**REGISTER NOW for the best price and tell all your friends and colleagues. I hope to see you in Atlanta this October for the one "Must Attend" conference of the year!**

Regards,

# KEYNOTE SPEAKERS



## PETER SHEAHAN

*Founder & CEO, ChangeLabs, Author of FL!P and Generation Y*

Peter Sheahan is known internationally for inspiring innovative business thinking and creating lasting behavior change. He has established himself as a highly successful entrepreneur with his international thought leadership practice and as the CEO of ChangeLabs, a global consultancy building and delivering large-scale behavioral change projects for clients such as Apple and IBM. Peter has worked with some of the world's leading brands, including Google, News Corporation, Harley Davidson and GlaxoSmithKline. In September 2012, Sheahan was inducted into the National Speakers Association Hall of Fame, receiving the Council of Peers Award for Excellence (CPAE) lifetime achievement award for speaking excellence. He has delivered more than 2,000 presentations to over 300,000 people in 15 different countries. In 2006, Peter was voted the National Speakers Association's Keynote Speaker of the Year and has since been named one of the 25 Hottest New Speakers in America, and one of the 25 Most Influential Speakers in the industry. He is the author of six books, including international bestsellers *FL!P* and *Generation Y*. As a global thought leader, Peter's insights into business trends and the changing needs of customers and staff have made him a regular presenter on Fox Business, with appearances on ABC and BBC as well. His newest book *Making It Happen* unpacks his insights on the execution of ideas through focused business growth, understanding buying behavior and compelling market positioning.



## J.B. BERNSTEIN

*Legendary Sports Agent and Marketing Pioneer*

As a 25+ year veteran of the sports marketing industry, J.B. knows what it takes to receive positive results. As the *CMO* of Seven Figures Management, a sports marketing and athlete representation firm, he was the mastermind behind *The Million Dollar Arm* contest. This revolutionary reality TV show and talent search for baseball players in India yielded the first two Indian-born men to ever sign pro sports contracts in the United States, both signing with the Pittsburgh Pirates. His story is now the subject of the Disney motion picture, *Million Dollar Arm*, where he is portrayed by actor Jon Hamm, of *Mad Men* fame. He is the *Co-founder* and *President* of the Access Group of Miami, and has represented some of the greatest athletes of all time including Barry Bonds, Barry Sanders, and Curtis Martin. J.B. was responsible for creating ground-breaking programs like Smith's "Run with History" which is now the standard deal in NFL milestone marketing. He received his bachelor's degree in political economics from the University of Massachusetts Amherst, and then went on to achieve his MBA from The London School of Economics. Out of his personal interest, he has separately achieved a Ph.D. in Physics from the University of Southern California and is currently pursuing his 2nd Ph.D. in a related field.





# WHY ATTEND

The Franchise Leadership & Development Conference brings CEOs, Presidents and top development executives together for a powerful two and a half day event that combines the impact of exciting presentations with peer-to-peer problem solving workshops and roundtables.



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## **SPEAKER ROSTER:**

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Our conference advisory board is comprised of some of the brightest, experienced leaders in the franchise industry today. We couldn't develop the quality programs and content without their support.

Please join us in thanking them for their contributions.

**Greg Vojnovic, CFE, 2014 Conference Chair**  
**Chief Development Officer, Popeyes Louisiana Kitchen**

Greg Vojnovic is responsible for franchise development, franchise real estate, construction, design, equipment, and franchise recruitment activities at Popeyes. With over 30 years experience in restaurant development, Greg has held leadership positions as Vice President of Development at Huddle House, been Director of Franchise Development at Maggie Moo's and held development positions at Denny's and Arby's.

**Art Coley, President, AlphaGraphics**

Art Coley serves as President of AlphaGraphics, which has nearly 300 locations, more than \$280 million in system sales, and is experiencing significant growth while providing opportunities for all its partner franchisees. Considered a forward-thinking franchise development expert, Art believes that because of its entrepreneurial spirit, franchising will lead the charge for economic development in both the U.S. and the world.

**Tim Courtney, VP Franchise & Network Development, CruiseOne**

Tim Courtney is the Vice President of Franchise Development at CruiseOne. Tim has worked in the industry for more than 15 years and has held various positions within the travel industry. In 2006, Tim joined CruiseOne in a Training and Education role and helped launch the company's online learning academy. Tim is a Certified Franchise Executive (CFE) and speaks at various Franchise and Travel Trade events.

**Steve Dunn, SVP Global Development, Denny's**

Steve Dunn, Senior Vice President of Global Development for Denny's, is responsible for overseeing all aspects of global restaurant development for the company. In his more than 25 years of franchise development experience in the restaurant industry, he has held executive-level positions with Church's Chicken, El Pollo Loco and TCBY. He is a sought-after public speaker on the topic of franchise recruiting and business development.

**Mike Hawkins, VP of Franchise Development, The Dwyer Group**

Mike Hawkins joined The Dwyer Group as a Franchise Developer and moved his way up to Vice President of Franchising. He plays an active role in the training and management of the franchise development team. Previously, Mike had sales and management roles at E.K. Williams, General Business Services and All Tune and Lube.

**Grant Kreutzer, Director of Franchising Licensing & Recruiting, Jack In The Box**

Grant Kreutzer develops and manages franchise recruitment programs to attract top multi-unit operators to Jack In The Box. Grant has 15 years experience in franchising, business development, branding and marketing. Over the last 10 years, Grant has worked with national restaurant chains in their franchise expansion efforts, utilizing consultative selling techniques and marketing principles to create franchise brands that differentiate the investment proposition.

**Richard Leveille, CFE, Former EVP of Franchise Development, Smoothie King Franchises Inc.**

Richard Leveille served as the EVP of Franchise Development and Real Estate for 15+ years and is credited as the first employee of the franchise company starting in March of 1989. There he directed the Franchise Sales, Real Estate and the Construction & Design Departments. Richard completed his Certified Franchise Executive (CFE) designation through the International Franchise Association in 2006.

**Pete Lindsey, VP of Franchising, Sport Clips**

Before Sport Clips, Pete Lindsey's 19 years in the franchise industry include National Sales Manager for Franchise Development at MBE, a UPS Company (The UPS Store), National Operations Manager at MBE, and Executive Director of Franchise Relations for MBE, where he was responsible for informal dispute resolution, renewals, transfers, customer service, and insurance compliance.

**Eric Little, SVP Franchise Development, Right At Home**

Eric Little has led the Right at Home franchise development team for the past five years. During that time the company has experienced record-setting growth and now has over

300 locations with \$234 million in annual system-wide revenues. Eric has been a Certified Franchise Executive since 2005 and is a former 1st Place overall winner of the Franchise Update STAR Award mystery shopping competition.

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

Lori Merrall, National Director of Franchise Sales, joined Massage Envy over four years ago as part of its expanded franchise development team. Previously, Lori spent five years in the franchise industry at Blimpie and Cold Stone Creamery. Prior to franchising, Lori worked in advertising and sponsorship sales for the Phoenix Coyotes and has spent the bulk of her career in the TV and film industry, primarily in sales and marketing.

**Scott Nichols, Franchise Business Development Director, Sears Hometown & Outlet Stores**

Scott Nichols is responsible for franchise development of Sears' three retail franchise concepts. Since 2011, Scott has overseen an over 400 percent increase in the growth of its franchise locations, completed a revamp of its entire development process, and improved ease of use for visitors leading to increased lead generation and deal closing ratios. Scott has over 25 years of director level franchise development experience in the hotel, quick service restaurant and retail industries.

**Debra Shwetz, Co-Founder, Nothing Bundt Cakes**

In 2006, Debra was charged with developing the Nothing Bundt Cakes franchising system. She developed the sales process, maintained all compliance records, put in place the entire bakery opening process, and then facilitated the sale of each franchise through the Grand Opening. Today, she remains an integral part of the franchise process assisting in sales, program development, franchisee support, franchisee relations and strategic planning.

**Jeff Sturgis, Chief Development Officer, McAlister's Deli**

Jeff has over 17 years of experience in the areas of franchise sales, franchise development and franchise strategy. In his current role as Chief Development Officer for McAlister's Deli, Jeff is responsible for the strategic planning and execution of all store development, real estate and franchise sales activities. Jeff is a frequent speaker at, and contributor to franchise industry events and various publications.

**Shelly Sun, CEO & Co-Founder, BrightStar Care Franchising**

In 2009, the IFA selected Shelly Sun as Entrepreneur of the Year. She is the youngest recipient of this prestigious award and only the second female to receive it. In May 2012, BrightStar Care was named the #1 fastest growing women-led business, for the second consecutive year, by American Express OPEN. Shelly is a CFE and participates on the IFA's Board of Directors, and is Co-Chair of the IFA's FranPAC President's Council.

**Greg Tanner, Former National Director of Franchise Development, Aaron's**

Greg Tanner is a franchise industry veteran who shares his invaluable wisdom in his book *Tannerisms*. Greg began his franchise career in publishing and has been successful in a variety of industries including automotive repair, car and truck rental, and fast food. He remains close to his military roots, serving on the IFA's VetFran Committee, and led Georgia franchisors in launching the IFA's Operation Enduring Opportunity initiative.

**John Teza, Chief Development Officer, Jersey Mike's Subs**

John Teza joined Jersey Mike's as CDO in May 2011. In his role, he oversees a deliberate strategy designed to accelerate the expansion of the brand while maintaining a quality-first approach. Jersey Mike's continued its steady growth in 2012 opening 92 new restaurants across the country. John previously held a variety of positions at Quiznos including EVP of Development, Senior VP, Non Traditional, and Senior VP Development and Operations.

**Tom Wood, President & CEO, Floor Coverings International**

Tom Wood is President & CEO of Floor Coverings International. Tom started with the parent organization in 1985 and has held several key positions in the various organizations over the past 28 years. After helping found CertaPro Painters, Tom became the President of the Franchise Development Center in 1998, and was dedicated to the growth and development of new franchises for several of the brands owned by the parent company.

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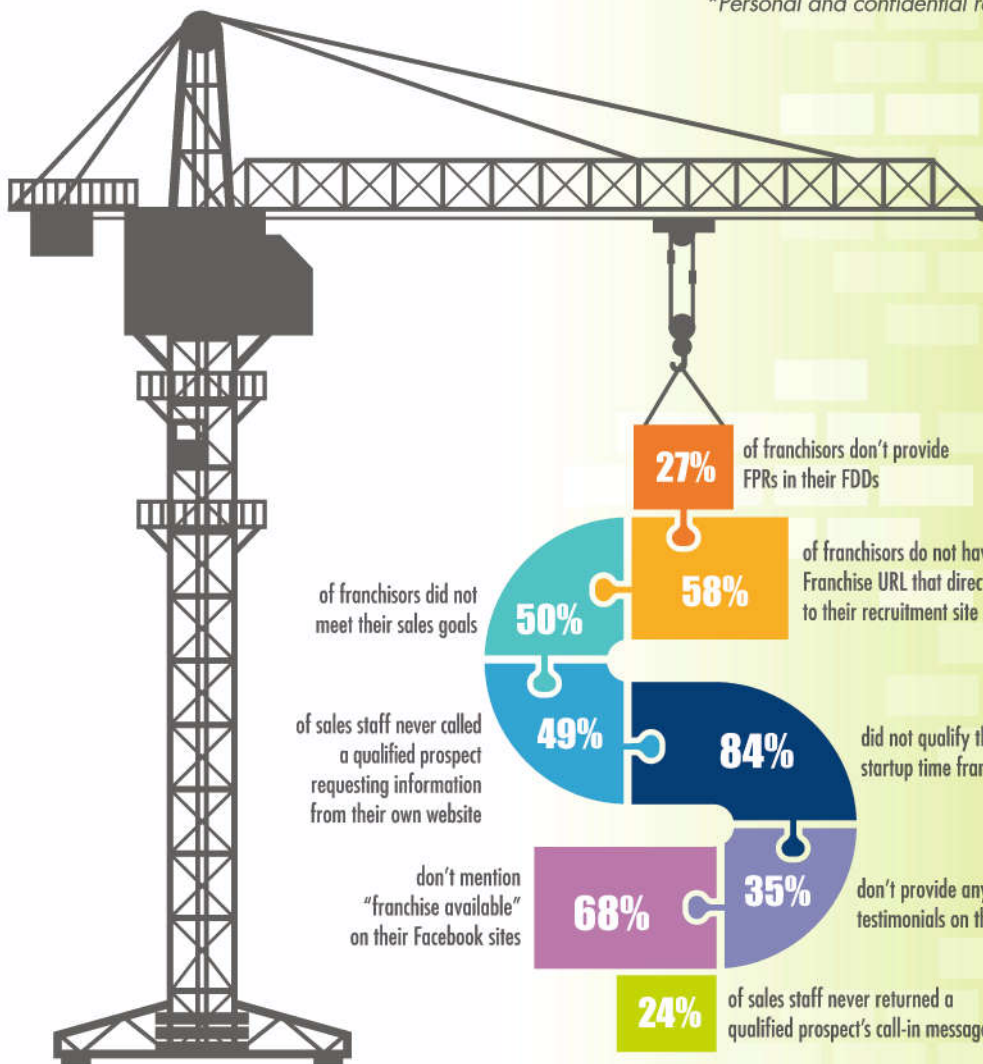
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**PRE-CONFERENCE WORKSHOPS**  
**WEDNESDAY**  
**OCTOBER 15**

**7:00AM TO 7:00PM**  
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**9:00AM TO 4:00PM**  
**CEO Summit** *(Additional Fees Apply.)*

The Franchise CEO Summit provides a private, high-level, and interactive environment for franchise CEOs to have strategic business conversations that typically wouldn't, or simply couldn't take place anywhere else.

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**9:00AM TO 12:00PM**  
**MAXIMIZE SALES PERFORMANCE TRACK**

**Mastering Sales Fundamentals**  
*(Open to all. Additional Fee Applies.)*

You're never too experienced to refine the basics. Whether you are a new franchise sales person or have been selling for a period of time, this session takes you back to your roots. We'll cover cold calling, conducting a call, qualifying the candidate, FDD prospect review, Discovery Day and closing the deal.



**1:00PM TO 4:00PM**  
**Build High Performance Sales Teams**  
*(Senior Executives and Sales Managers only. Additional Fee Applies.)*

To build a world-class brand you must provide great support. How do you decide what positions are needed and who should fill them? What decision making process do you go through? Do you promote from within or hire from outside? What level of experience is optimum for your brand?

**9:00AM TO 12:00PM**  
**GROW SUCCESSFUL FRANCHISEES TRACK**

**Identify, Attract & Recruit the Right Prospect**  
*(Open to all. Additional Fee Applies.)*

Brand growth comes through quality franchisees executing the vision. Who are these franchisees and where do you find them? Do you truly understand who your target audience is? How do you communicate with them? What are the best media and messages to reach them? Learn how to identify your true franchise prospect and communicate with them on their terms.

**1:00PM TO 4:00PM**  
**Position Your Franchisees for Success**  
*(Open to all. Additional Fee Applies.)*

You've found the right franchisee and closed the deal. Now you need to ensure that the new location opens with the optimum chance for success. In this session, you'll learn what you need to do to help position new franchisees and drive maximum sales and profits. We'll cover the steps to take from closing the deal, to location opening – site selection, construction, financing and training. Learn the importance of saying "no" while waiting for the right site or opening. We'll discuss undergoing difficult conversations and how to approach them if necessary.

**5:00PM TO 7:30PM**  
**Cocktail Reception in Exhibit Hall – EXHIBITS OPEN**

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"I would strongly recommend you to any sponsor or a franchise group looking to meet, network, and build real business relationships. Awesome networking! Franchise Update Media Is Outstanding!"

– Art Boldetskiy, *Senior Account Manager*, ProspectPro Advertising

# CONFERENCE DAY 1 THURSDAY OCTOBER 16

**7:45AM TO 8:25AM**

**Breakfast in Exhibit Hall** – EXHIBITS OPEN

**8:30AM TO 10:15AM**

**Welcome** – Therese Thilgen, CEO, Franchise Update Media

**Chairman's Message** –

Greg Vojnovic, CFE, CDO, Popeyes Louisiana Kitchen

**The State of Franchising** –

Darrell Johnson, CEO, FranData



**Keynote:**

**Peter Sheahan**

Founder, CEO of ChangeLabs  
Author of *FLIP* and *Generation Y*



**10:15AM TO 10:30AM**

**BREAK**

**10:30AM TO 12:30PM**

**Annual Franchise Development Survey**

We'll present the results of the 16th annual Franchise Development Survey. We will cover lead generation, cost analysis, lead to deal close ratios, compensation structure and the importance of an effective development team.

**Mystery Shop Scores**

With the growing competition in the franchise space, a successful team needs to be at their best to recruit, retain and close with top quality franchisees. Our team of franchise expert mystery shoppers set out to discover how brands are performing with prospective franchisees.

**Implications Of The Annual Franchise Development Survey and Mystery Shop Results**

A panel of franchise development executives will provide their interpretation of the survey and mystery shop results.

**12:40PM TO 2:10PM**

**Lunch in Exhibit Hall** – EXHIBITS OPEN

**2:15PM TO 4:30PM**

**BREAKOUT SESSIONS**

Our breakout sessions are divided into three tracks. Each track offers back-to-back sessions directly relevant to the topic of the track. You may choose to follow one track or participate in any session of a different track. The three tracks are:

**FRANCHISE SALES BASICS TRACK**

This track is designed to support team members specifically new to franchise sales. We'll work on developing the skills needed to drive and close the deal. What techniques work best and how can you refine your craft? Learn how you can become a better sales person overall.

**BUILD A WORLD-CLASS BRAND TRACK**

Building a World-Class Brand requires commitment from everyone within the brand. A cross-functional approach to growth that ensures everyone is on-board brings the best results. In this track, you'll learn how top performing brands drive growth and what you can do to help your brand constituents get on-board.

**MARKET PLANNING & DEVELOPMENT TRACK**

Optimum growth derives from maximizing market penetration for the number of locations as well as advertising contributions. Learn how to fully understand your market and grow as efficiently as possible.



**FULL AGENDA**

# CONFERENCE DAY 1 THURSDAY OCTOBER 16

**2:15PM TO 3:15PM**  
**FRANCHISE SALES BASICS TRACK -**  
**Identify & Qualify a Warm Lead**

There are a lot of tire-kickers out there – how do you determine which prospects are good leads? Learn how to direct the initial conversation to understand if the prospect is serious and if they qualify to become a franchisee of your brand. What skills and techniques work best in this environment?

**BUILD A WORLD-CLASS BRAND TRACK -**  
**Cross-Functional Approach to Growth**

Does making the statement “We’re a Growth Brand” mean that you’re truly a growth brand? Each discipline within the brand plays a role in building a world-class brand. Learn how brands are growing successful, happy franchisees through a cross-functional approach.

**MARKET PLANNING & DEVELOPMENT TRACK - Geo-Targeting for Optimum Recruitment & Site Selection**

How do you approach market penetration? Do you add franchisee locations quickly to get them open or do you use a disciplined approach? In this session, you will learn how to develop a market plan that geo-targets ideal locations and geography that can be used for location development and franchisee recruitment.

**3:30PM TO 4:30PM**  
**FRANCHISE SALES BASICS TRACK -**  
**Develop the Lead & Close the Deal**

Now you’ve identified the qualified prospect. What do you do next to develop the lead through the pipeline? This session provides tips on how to keep the prospect interested and excited throughout the process until the deal closes.

**BUILD A WORLD-CLASS BRAND TRACK -**  
**Educate the Brand & Manage Up**

Franchise Development is responsible for driving brand growth. This requires that everyone on the team understands and supports growth, starting with the executive team. Are you doing what you need to do to ensure a complete understanding of growth – from your executive team to your receptionist?

**MARKET PLANNING & DEVELOPMENT TRACK -**  
**Build Your Development Success Team**

Are you providing optimum support for effective market development? Do you have the right players on your team to provide franchisees with the direction they need to maximize their location performance? What types of compensation and incentives are you using to attract the best team members? This session will help you take a hard look at your team structure to determine if you have the right team foundation.

**4:45PM TO 6:00PM**  
**Business Solution Roundtables Challenge**

**7:00PM TO 9:00PM**

**2014 STAR AWARDS DINNER**

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**Presented By:**

**J.B. Bernstein**

Legendary Sports Agent, Marketing Pioneer and Inspiration for the Disney hit film *Million Dollar Arm*

# CONFERENCE DAY 2 FRIDAY OCTOBER 17

**9:00AM TO 11:00AM**  
**Economics of Franchise Development Workshop - Budget, Plan, Track & Evaluate Results**

In this workshop, participants will learn the step-by-step process of how to build and evaluate a recruitment plan and budget. We’ll cover what tools you need to develop and execute an effective recruitment plan. What systems provide a comprehensive way to track results? What are the best measurements of a recruitment program – cost per lead, deal, etc. so you can get prepared for next year?



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# Market

## Consumer marketing initiatives

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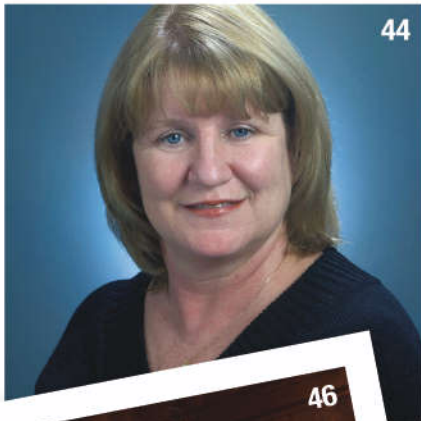
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Managing change, making dollars

# Smokin' the Competition

Dickey's Barbecue Pit preps for growth with new CBO

**T**exas-born and bred Dickey's Barbecue Pit is looking to expand. That's partly why executives of the family-owned brand recently created a new position—chief brand officer—and called on a fellow Texan to market that message and help build greater brand awareness nationwide.

Christie Finley brings vision, drive, and creativity to the nation's largest barbecue brand, which has more than 400 locations in 42 states. Finley says she's focused on "the basics done right," and on promoting the brand's core values of heritage, innovation, and craftsmanship.

As chief brand officer, Finley oversees all traditional marketing efforts of the brand, which is well-known in Texas for its big, bright-yellow cups and savory, smoky barbecue. She says the brand relies on a multi-channel approach for creating awareness and driving customers in—and keeping them coming back time after time.

Finley previously led the strategic development and implementation of advertising and marketing campaigns at a diverse range of consumer and B2B brands, in both corporate and agency roles. Her experience is going to come in handy as the Dallas-based brand begins aggressively expanding to the West. Dickey's recently signed a 100-unit deal in California and has its sights set on Washington and Oregon.

The challenge right now for Finley is creat-

ing a consistent experience that crosses regional boundaries, and getting it to catch fire in new territories where customers are not as familiar with the legacy brand. She says Dickey's quality and authenticity will be the perfect cornerstones to build the brand outside the Lone Star State.

"Our goal is to create brand loyalists," she says. "When you love your loyalists, they do the talking for you. This includes guests, our franchise owners, and even employees at the corporate office."

**Describe your role as CBO.** I own the brand experience and I don't take that charge lightly. This is a 73-year-old brand, and brand loyalists and barbecue

fanatics have grown up with Dickey's Barbecue in heritage markets. Guests relate to the family-owned brand and the craftsmanship that comes with passing down recipes from generation to generation. In this newly created position, I will be guiding the overall brand direction cross-functionally, allowing it to continue energized expansion while expanding into new markets.

**What's unique about the CBO position at Dickey's?** Dickey's Barbecue has been family owned and operated since 1941, which gives us a powerful brand story to share while keeping it relevant for new audiences. We are doing something that has never been done in the restaurant industry by tak-

ing barbecue to a national audience. This requires a certain degree of educating our consumers on the artisanal tradition of the brand and handcrafted nature of our product line. Our vision is to ensure that the brand is represented across the entire system, and that it transcends the "function" of marketing.

**What's the most challenging part of being a CBO today?** Moving an entire franchise system behind one unified vision is an exciting challenge. Our entire system must be laser-focused on creating a consistent consumer experience that is reflective of our brand promise. The guest experience in California must be the same as the experience in New York and Texas.



Christie Finley

From the rustic design of our restaurants to the wood-fire smell from the smoker to the music playing in the background—it all sets the tone for our guests. Our brand must be consistent at every touch point.

**What are the 3 most important keys to being an effective CBO leader today?**

1) Balancing discipline and creativity. Creativity and accountability are never separated in marketing success. 2) Empathy. Understanding the voice of our guest is at the core of creating a relevant brand. We have to be very insightful about who we are and what we mean to our guests. 3) Zooming in and zooming out. The ability to understand the levers that affect business results, while also being able to see the bigger picture of the entire business strategy, is vital to success.

**How do you prepare a marketing plan and execute the strategies?**

I'm thrilled to join an organization that is so passionate about investing in and building a truly differentiated brand experience. In today's fast-paced, quick-serve environment, creating a relevant brand takes strategy and innovation. Preparing an effective marketing plan requires understanding our guests and focusing on the basics done right.

**How do you measure marketing results and effectiveness?**

We are a very goal-oriented company. What gets measured gets managed. Everyone has a metric and everyone has a goal. We have an entire whiteboard wall in our marketing department dedicated to daily and weekly goals for all sales and marketing channels, from business segments and social media to web traffic and public relations. We hit goals—period. Marketing is all about results and effectiveness.

**Discuss your core consumer marketing strategies and objectives.**



We use an integrated multi-channel approach to raise brand awareness and create preference. Dickey's core values—heritage, innovation, and craftsmanship—are represented in everything we do and across every marketing touch point. We are constantly testing, learning, and optimizing. The key is to stay flexible. We look at metrics daily, and information is available to allow us to continually improve. Our goal is to create brand loyalists. When you love your loyalists, they do the talking for you. This includes guests, our franchise owners, and even employees at the corporate office.

**How do you go about creating a "customer-centric" marketing and brand philosophy?**

Creating a successful brand is about knowing what makes your customers tick and being able to create that experience every time. Today's consumer relates to brands that are authentic, straightforward, and genuine in their approach. Dickey's Barbecue is recognized around the country, but when you walk into our stores it feels like a local barbecue joint. We know it's the details that make guests feel good about dining with us, and it's also what will keep them coming back. Consumers have more and more control over how they engage with a brand, which puts the onus on us as brand agents

to stay relevant and listen to our guests. In Texas we have customers who already have a very strong emotional connection with our brand. As we expand into new markets, we aim to continue that two-way conversation through social media and loyalty programs.

**Describe your marketing team and the role each plays.**

Our marketing department operates as an in-house advertising agency. We have a creative team, social media, public relations, community marketing, web content, and media buyers on site to optimize the brand experience at

every touch point. Our in-house team has extensive knowledge of the fast-casual industry, while taking into account the unique culture of barbecue when creating communications. Our owner/operators appreciate our in-house team as brand stewards and experts in brand marketing efforts. Having these in-house capabilities allows us greater flexibility and gives us the ability to turn projects around quickly with cost efficiencies, and most important, a high level of creative deliverables that produce marketing results.

**Why is it so important for the marketing department to have a "personal touch" when it comes to helping the brand connect with franchise prospects?**

Buying a franchise is a very personal commitment. Our franchise owners are entrepreneurs taking the leap to own their own business. Many times a potential franchise owner is investing funds they have saved over a lifetime. When they decide to buy a Dickey's Barbecue franchise, they are putting their trust in us and our commitment to providing tools to help them become successful. The Dickey family takes pride in providing an exciting franchise opportunity and looks for potential owner/operators who share their passion for the art of great barbecue.

**How does this help your franchise sales and development effort?**

We believe in taking a personal approach with potential franchise owners. This means getting to know their goals and lifestyles. Our development group really takes the time to explain the history of Dickey's Barbecue, franchise opportunities, and set expectations. The brand offers low start-up costs, multiple revenue streams, and an expert support team for franchise owners. We also have an extensive training program at Barbecue University, where we drill down on our approach to quality, authentic barbecue, and guest focus. In addition, our construction and real estate departments are here to assist franchise owners in site selection, lease negotiation, design, permitting, and equipment procurement. As a nationally established brand, Dickey's offers more than 73 years of restaurant knowledge and a team of experts to coach franchise owners through the opening experience.

**Do today's prospects expect more from the franchise marketing department? What, and how do you provide it?**

I'm not sure if it is a prospect's expectation, but it is our standard. We provide our franchise owners the same level of service they would expect from an advertising agency. They want transparency about the market-



ing support they are receiving, and we provide it in multiple formats from quarterly snapshots to newsletter content to training videos. We bring years of marketing experience to support the brand, providing strategic forethought, planning, and feedback loops to ensure all touch points are covered.

**What advice would you offer to aspiring CBO/CMO executives?**

If you had asked me 5 or 10 years ago, I would have said being a CBO was the last thing on my career "to do list." I have an innate sense of curiosity. I love to dig deep, uncover insights, and then understand how those insights affect and shape a brand. Creativity and innovation drive me, and I like to roll up my sleeves and get my hands dirty. I am fortunate enough to be part of a brand that's built on passion, creativity, and innovation. I'm thrilled with the opportunity to lead the brand into the next generation. ■

# Franchiseupdate magazine

## ISSUE 4 OF 2014

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# CMO roundtable:

## “How do you identify your ideal customers, and how do you target them effectively with your marketing initiatives?”

**Melissa Conner**  
Marketing & Operations  
Kidcam Camps



Kidcam Camps has 17 company-owned and franchised summer camp locations for children ages 3-13. Although we plan for our summer business

year-round, we heavily market to our prospective customers for only about 5 months. Each location is treated a little differently, but there are a few initiatives we have found effective regardless of location.

Even though our business is all children, it's the parents making the decisions, and we know our customers choose us primarily on location. How close are we to their home or work? We look at a lot of reports in our off-season telling us where our campers attend school, where they live, and how they found out about us.

We use every type of marketing, including mail, print, and online. But in the last year, we have shifted the majority of our marketing spend from print to online. We found we can be much more targeted and effective looking at individual marketing opportunities by area, versus casting a wide net to the masses.

In the early stages of our marketing, we place our existing camper base into Google Earth and study where they live in proximity to the camp they attend. From there, we use the USPS Every Door Direct Mail program to target prospective neighborhoods that are close to schools, have a fair number of our campers living in a specific area, or have household incomes that meet our customer profile.

Google AdWords and Facebook

advertising are also proven methods of successful advertising for us. At least 50 percent of our website traffic comes from Internet searches, and with AdWords I can “cast the wide net” of anyone searching for a summer camp in the New Orleans area where we have seven locations, or I can be more targeted to the more rural areas where parents might be searching for summer camps in a smaller city; the same with Facebook. A good portion of our business is also referral-based. We play a lot with sponsored posts, as well as online promotions through social media to help us garner new business and get our loyal customers talking about their positive experiences with Kidcam.

We have a short window of opportunity to get into the hands of parents as they are making their decision on summer camp. The three opportunities we find most effective are: 1) getting our existing parents to commit to their decision early, 2) getting them to sell the Kidcam experience to their friends, and 3) being extremely targeted in finding new families based on what we know about our existing database.

**Martha O’Gorman**  
Chief Marketing Officer  
Liberty Tax Service



The one thing I have learned through my years of experience in marketing is that the ideal customer is best identified by modeling them after a real person. I spend a lot of time watching and listening to our customers in person and through social media channels to get a sense of who they are and what they are looking for in a tax preparer. In many ways that expectation is all over

the board, but there is one constant that rings true throughout our customer base: they want to be treated with respect by a friendly person who makes them feel good about their experience with us. Sounds simple, but in fact it is not easy to do with consistency.

To effectively target our customers, we have to know them, see them, and watch and listen to their interactions with our franchisees and their employees. Too many marketers are so far removed from the actual customer that, in my mind, we can sometimes get swept away with the latest “cool” technology or some brilliant creative product that in reality does not speak to the needs,

**“Our customers want to be treated with respect by a friendly person who makes them feel good about their experience with us.”**

wants, and desires of the people we are trying to reach.

Social listening is one clear way to identify those needs, wants, and desires. We take a very active role in monitoring and responding to the social conversations that take place about our brand. It is here you can identify the pain points your customers have and strive to adjust your business model to eliminate those problems. It is also through social listening that you can hear the good things customers say about your business and capitalize on those strengths. Messaging can be modified or changed to be responsive to the social conversations.

Once you have set up the mechanisms to listen to your customers, the targeting and delivery vehicles for the marketing programs become so much easier to create and execute with confidence, as opposed to sending a strategy to market and then hoping it resonates.

My three key pieces of advice are:

- 1) Listen.
- 2) Respond.
- 3) Execute on what you learn. ■

BY JACK MACKEY

## The Power of Customer Insights

Understanding the power of fact-based marketing

“Insight is a new configuration of knowledge that breaks the existing pattern of thinking in an unexpected way.” This definition of insight comes from Luke Williams, professor of marketing and innovation at the NYU Stern School of Business. In short, insights drive intelligent marketing decisions that, when executed well, drive growth. Williams spoke at the Franchise Consumer Marketing Conference in Atlanta in June.

There it was also my pleasure to host part of a wide-ranging panel discussion on marketing strategy, planning, execution, results, and measurement. Executives contributed their insights obtained in diverse industries from child education to senior services. Retailers, personal service providers, and restaurant operators all shared surprising lessons. Three key takeaways on gaining insights that drive action:

- Customer research and competitive analysis are the foundation to setting marketing goals and creating plans.
- The quality of execution and harmony on a given marketing plan will vary according to the degree of franchisee buy-in.
- Companies that excel at customer research, analysis, and execution achieve consistently better results.

Wendy Odell Magus, vice president of marketing at Kiddie Academy, explained how she was able to gain franchisee commitment to a controversial proposal to change the brand logo. She believes that once you have data from and about real customers, marketing decisions become fact-based. So she posed three thoughtful questions to drive her research on

Kiddie Academy’s desired customers:

- 1) How do they come to us?
- 2) Why do they come to us?
- 3) Why do they choose us?

Customers of competitors, people who did not choose Kiddie Academy, also were interviewed.

The research revealed that customers of child education services wanted quality education for their children, not just child daycare. From that insight, her team began to redefine their messaging. Of course, the brand logo is a key visual component. It evolved from an emphasis on “Kiddie” to accentuating the educational promise implicit in “Academy.” By sharing the research and insights with franchisees, it was far easier to gain agreement to align the logo with what matters most to target customers.

Jeff Link, CEO of Analytics Media Group, the other keynote speaker at the conference, made a strong point about the necessity of finding clear targets as a prelude to developing marketing campaigns. The idea comes from his work in helping political candidates get elected. Instead of trying to appeal to all possible voters, he found success came from narrowly focusing on the voters who were the most “persuade-able.” In business, the most desirable customers are those most likely to convert to trial customer to regular customer to brand advocate. Once you have the right targets, you can design everything from your branding to your promotions to your customer experience to meet their expectations, needs, and aspirations.

An example comes from Valerie Kinney, director of communications at Auntie Anne’s, a growing brand in the snacking category that offers fresh-baked pretzels,

mostly from mall-based locations. Faced with the emerging customer demand for gluten-free menu options, they argued internally about whether to add such an offering to their menu. But their research showed that only 3 percent of their customer population wanted gluten-free food. As a result, they focused instead on better understanding what the 97 percent really wanted, and why they chose Auntie Anne’s.

At the start of their discovery effort, the belief was that Auntie Anne’s customers were mall-shopping moms with strollers. But their research and analysis uncovered three distinct customer segments, which they named 1) I love snacking, 2) social trendsetters, and 3) family/kid friendly, to identify different drivers of consideration for Auntie Anne’s.

One disturbing discovery was that many customers perceived that the pretzels were fried, rather than baked. That’s a problem because Auntie Anne’s pretzels are baked fresh daily on the premises. Customers were surprised to learn that.

So the marketing team developed a new positioning statement, “Bringing unexpected freshness to the world.” Yet Auntie Anne’s also discovered they weren’t as good as they thought they were in delivering on this promise. That insight from listening to customers surprised the marketing team. Or as Williams would say, that insight broke “the existing pattern of thinking in an unexpected way.” It also brought about a renewed focus on improving the customer experience, based on what customers said.

This last point is very important for every franchisor. You can say what you want about who you think you are, but it is ultimately your customers who define your brand. Based on their experiences, and the experiences of their friends, customers form their own perceptions and attitudes about your brand. That’s how customer loyalty is built. That’s the power of customer insights. ■

*SMG Vice President Jack Mackey helps multi-unit operators improve customer loyalty and drive growth. Contact him at 816-448-4556 or [jmackey@smg.com](mailto:jmackey@smg.com).*



# 2014 Franchise Consumer Marketing Conference

BY KERRY PIPES & EDDY GOLDBERG

**C**onsumer marketing changes constantly—no news there. Keeping up is another story. Tactics and thinking that were progressive and results-oriented yesterday are passé and ineffective today. To make matters worse, franchisors are also battling an increasing glut of media channels, confusing new technologies, and competition from all sides. No one understands these challenges better than the franchise CMOs and marketing executives on the Franchise Consumer Marketing Conference’s advisory board, who deal with them every day.

The board took all these challenges—and more—into account when they developed the theme of this year’s conference: “Change: The New Marketing Currency.” The fourth annual conference, held in June at Atlanta’s InterContinental Buckhead Hotel, attracted top franchise marketing executives for two days of jam-packed education, sharing, and networking, all seeking to gain an edge on their competition and learn about the latest strategies and techniques in the world of consumer marketing. Conference Chair Heather Neary, CMO for Auntie Anne’s, summed things up early by saying, “If you’re not green and growing, you’re ripe and rotting.”

**“If you’re not green and growing, you’re ripe and rotting.”**

## FCMC BY THE NUMBERS

**ATTENDEES**  
**314 Total**  
**177 Franchisors**  
**123 Sponsors**  
**14 Other**

**FRANCHISORS BY CATEGORY**  
**78 Service**  
**42 Food**  
**23 Retail Non-Food**  
**13 Retail Food**  
**21 N/A**

### Welcome to Boot Camp

The conference kicked off Tuesday with two all-morning boot camps. The first focused on marketing in a digital world and was divided into four parts: online marketing, mobile marketing, loyalty programs, and social media. Ed Waller, vice president of CRM at CertaPro Painters and former conference chair, facilitated as panelists provided real-world examples of their struggles to find solutions for maximizing marketing dollars and results. Phillip St. Jacques, a partner at St. Jacques Marketing, facilitated the second boot camp, which explored how to create cross-functional strategies to gain buy-in from customers, franchisees, franchisee prospects, and other stakeholders, including employees and suppliers.

### Let the networking begin!

Following an information-packed morning, attendees streamed into the Sponsor Networking Gallery for lunch and their first opportunity to visit with nearly 125 vendors, suppliers, sponsors, and one another, reconnecting with old friends and making new ones. Technology continues its growth as a driving force behind the marketing strategies and efforts of most brands today—and it showed in the number of tech-based



companies offering everything from local marketing solutions to SEO to social media solutions.

**General session convenes**

Lunch was followed by the first general session of the conference. It began on a somber note as the Franchise Update Media team took the stage for a poignant recognition and moment of silence to mourn the recent passing of Tim Gardner, son of Franchise Update founders Gary Gardner and Therese Thilgen. Tim was the company’s executive video production manager and touched many lives through his work. He will be greatly missed. (See In Memoriam, page 60.)

Conference Chair Heather Neary then introduced Tom Epstein, CEO of Franchise Payments Network, who spoke on the State of Consumer Spending. Reporting on the numbers, he said consumer use of checks and credit/debit cards is down from 2010, and the use of ACH and prepaid gift cards is up; and that online purchases are beginning to fall as mobile purchases rise. And while “franchising has adopted mobile more quickly than corporate businesses,” he said, “consumers want more mobile than companies are providing.” Customers in loyalty programs, he said, spend 17 percent more and visit 50 percent more than non-members.

He also discussed the increasing effect of smartphones and tablets on how consumers do business; the benefits of geofencing to drive customers into stores; and once they’re inside, iBeacon’s in-store messaging capabilities “to



**Keynote speaker Jeff Link, Analytics Media Group**

get people in the store to *do* something they normally wouldn’t”; for example, beaming out a message such as, “Hey come back to sweaters! Did you know they’re 50 percent off today?”

Next up was Jeff Link, CEO of Analytics Media Group, who played a key role in the 2012 Obama campaign’s use of big data and micro-targeting by figuring out how to reach the precise subset of undecided voters they wanted and targeting ads specifically to them. “Marketing should be target-specific,”

he said. “Figure out the group you want to reach and go after them.” That is, if you know how. While the Romney campaign outspent the Obama campaign nearly 10 to 1 on advertising, Link said they weren’t spending in the right places. “We knew we were going to be outspent, so we traded reach for repetition,” he said. “We found a lot of gold at the long tail of cable.” He surprised many attendees as he described how DirecTV and Dish Network now allow advertisers to send commercials to specific set-top boxes based on selected household demographics. Example: even if you and your next-door neighbor are watching the same show on the same station, you might see dif-





ferent ads. “They load the ad onto the set-top box. We were agnostic about which show they played on,” said Link. Franchise marketers with a limited budget (and whose isn’t?) could benefit by applying some of these tactics to their own marketing strategy.

#### Break out the breakouts!

The rest of the afternoon was filled with concurrent breakout sessions divided into four tracks: Start-Up/Evolving Brands & Markets, Marketing Execution, Blending Old and New School Media Strategies, and Create and Keep Positive Brand Buzz.

In the Blending Old and New School Media Strategies session, a packed room heard David Buckley, CMO for Sears Hometown & Outlet Stores, Emma

Tom Epstein, Franchise Payments Network



Holahan, digital marketing director at CertaPro Painters, and Valerie Kinney, director of communications for Auntie Anne’s hold forth on what’s working and what’s not in their social media efforts.

The day wrapped up with a marketing roundtable challenge session that provided ample opportunity for discussion and interaction among participants. With their work behind them, attendees returned to the Sponsor Networking Gallery to close out the day with a welcome reception and additional time with vendors and peers to explore the new technologies and other marketing solutions on display.



#### Disruption and the economy

Wednesday began with breakfast in the Networking Gallery, followed by the day’s keynote speaker, Luke Williams, who delivered a wide-ranging discussion on the importance of innovation in business success. Williams, professor of innovation at NYU’s Stern School of Business, is the author of the best-selling book *Disrupt*. “If you’re interested in growth, you must be interested in innovation,” he said. “Ideas are the recipes for increasing returns.” His overall message was not to become complacent with success. “The pace of disruptive change is accelerating in every industry,” he cautioned. Staying on top of it, he said, means seeing the world differently every day. “Disruptive thinking,” he said, “can change the way you think about your business—and your competition.”

Fradata President Darrell Johnson followed with his annual State of the Industry report. Building on Williams’s theme, he asked, “Will the economy offer franchising a disruptive opportunity in the next few years? I think yes.” The economy, he said is in “modest slow-growth mode” with GDP expected to remain below 3 percent for the next 3 years. Some modest good news: consumer confidence is “reluctantly rising,” consumer spending is trending upward, and housing is coming back slowly (however, the 19 percent of homes remaining underwater still need to clear the system). He said the credit box has eased somewhat, but “nowhere near has compensated” for the tightening of 2007–2009. Implications for franchising



include: 1) more pressure on market share in a slow-growth economy; 2) growth increasingly from M&A, with large franchisees getting larger; 3) Baby Boomer retirement accelerating, ushering in the Millennials and increased spending on technology; and 4) profitability emphasizing cost efficiencies. At the brand level, he said, brand distinctions will assume greater marketing importance.

Two more rounds of concurrent breakout sessions completed the morning, including: Ad Fund Contribution and Management, Strategy and Plan Development, Print and Direct Mail, Ensuring Quality Customer Experience Across Disciplines, Growing into Media Efficiency, and Building Brand Infrastructure To Support Your Customers (Consumers and Franchisees).

**Cause marketing: “RO-why”**

Following a final opportunity to meet and greet in the Sponsor Networking Gallery over lunch, attendees convened for a final general session called Cause Marketing: Brands that Give and Get Back. Molly Maid President Meg Roberts facilitated a discussion featuring Hungry Howie’s vice president of marketing Jeff Rinke, Jersey Mike’s CMO Rich Hope, and Massage Envy’s CMO Susan Boresow. Each told the story of how their brands became involved in causes and communities across the country. “The cause must predominate,” said Roberts, “not the mutually beneficial profit. Awareness of the brand is a by-product.” Or as Hope put it, “You don’t give to get, you give



Meg Roberts, Jeff Rinke, Rich Hope, and Susan Boresow

to give.” Their inspiring stories and videos showcasing some of the people they’ve helped provided ample—and emotional—fodder for the marketing executives to take home to their management team.

Four additional breakout sessions followed on how to improve cooperation between the marketing and sales teams; execution and measuring results; broadcast and outdoor advertising; and crisis communications. The conference concluded with an entertaining, participatory “mindshare” session on

the new marketing currency (change, remember?). Led by Jayson Pearl, chief brand officer at BrightStar Care, attendees gathered into teams and competed to come up with the best solutions to a common challenge and then presented them to the group and a panel of judges.

A closing dinner at nearby Maggiano’s Little Italy brought the proceedings to a celebratory close as attendees relaxed over a family-style Italian dinner, getting in their final visits with friends old and new, and saying their good-byes until next year.

Wish you were there? Plans are under way for next year’s 5th annual Franchise Consumer Marketing Conference. To find out more visit, [www.franchiseconsumermarketing.com](http://www.franchiseconsumermarketing.com). ■



Keynote speaker Luke Williams



# Grow

Franchise development intelligence



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# Challenge the pros

## “What do you look for in a salesperson, and what are the critical elements to building a great sales and development team?”

**Larry Flaherty**  
**Director of Franchise Development**  
**Pet Supplies Plus**



If you ask five different franchise development professionals this question you'll get six different answers. When recruiting salespeople, I look first and foremost to their integrity. I want a team I can trust to do the right thing, make the right decision, and not simply make a sale. I expect our sales team to look at each candidate and anticipate how they may or may not fit within our pet-centric culture. I look to them to provide me with their honest recommendation based on their observations. Next, I look for someone who has all-around sales qualities, such as a strong sense of urgency, an assertive personality, and who looks for solutions, not problems.

Once you have a group of great sales people, the next stage is the establishment of a strong sales and development team. To develop a first-class team you need to have clear objectives. Our objective is to be “America’s Favorite Neighborhood Pet Store.” To accomplish your objectives, you must have internal alignment, from the CEO to store leaders to your franchisees.

The next step in the establishment of a great sales and development team is the three “Ts”: Training, Technology, and Team. It is important to provide the time for the sales and development team to “keep their saws sharp” through seminars, networking, and conferences. Additionally, it is important to provide the sales team with the internal and external technological tools and resources necessary to accomplish their jobs and

measure the organization’s effectiveness.

Fostering the development team’s culture is critical. Many franchisors use salespeople who work remotely. It’s important to bring the salespeople together regularly to bond, share experiences, and to understand the operational side of the business. This is done in conjunction with the exhibition of best management practices, leading by example, positive recognition, and two-way open communications by the development team’s leadership.

In today’s recruiting environment it’s apparent that there are no silver bullets. A multi-faceted approach to recruitment is critical. You should not invest in a sales team unless your company is financially committed to develop the leads for them to close. Not only does the organization need to have the desire to grow, it has to be fully committed to investing in the people, the tools, and the marketing resources needed to successfully accomplish the franchise development plan.

**Jason Mattes**  
**Chief Development Officer**  
**Fierce Brands (Retro Fitness, Let’s Yo! Yogurt)**



David Sandler, who was one of the brightest and most gifted sales trainers of his time, once said that “Selling is a Broadway play performed by a psychiatrist.” This novel, yet profound, idea formulated many moons ago, has helped shaped the way I defined my role when making my bones in franchise sales, and it still provides a GPS of sorts when I interview folks today.

Obviously, there are a handful of

qualities that most successful sales professionals possess to some degree—integrity, accountability, high energy level, self-image of success, drive to excel, and persistently determined—but the characteristics often overlooked when looking for a salesperson are their listening skills and their ability to ask high-value questions and build positive business relationships with the individuals they sell to.

Popular opinion leads us to believe that product or industry knowledge is key. It’s not. In fact, it’s probably the most overrated quality sought when evaluating a salesperson for a position. Unfortunately, most business people make decisions about hiring salespeople based on the amount of product knowledge that person has, more than any other single factor. While product knowledge is nice, it’s not necessary. Knowledge is just that, knowledge, and can be gained and best applied by salespersons who possess the ability to not just sell features and benefits, but who know how to ask the right questions and when to zip it and listen. Often, customers will tell a salesperson everything they need to know and give them the blueprint for their purchasing decision—if just given the opportunity to do so!

As far as the critical elements to building a great franchise sales and development team, I find they are the same as what helped the Boston Red Sox, Seattle Seahawks, and San Antonio Spurs become world champions. Leadership, shared vision, attitude, commitment, mutual trust, and collaboration are all essential components to winning, whether on the field or in the office. Having these elements in place creates chemistry, and by adding in a system and process that is duplicable and replicable, you have all the makings of a sustainable championship environment for your team.

At the end of the day, month, or fiscal year, looking for a salesperson who is a great communicator—not just by how they talk, but by how they listen and build a team with an emphasis on the whole—will allow you to hit your sales and development goals year after year. ■

BY MARC KIEKENAPP

## Five Not-So-Easy Pieces

Tune up your system to get more quality candidates

**F**ranchise development department success depends on five different pieces fitting together in an organized and precise manner: 1) the company website, 2) promotional materials, 3) the FDD, 4) franchisee validation, and 5) discovery day (the office visit). Let's discuss these five critical factors and make sure your system is tuned up to achieve the best results.

**1) The company website** is your most effective tool for conveying the culture and excitement of your franchise offering. The recruitment website should be updated quarterly or even monthly to reflect new information about your concept, good news about your franchisees, and any new public relations stories that highlight your brand. Current news and information will keep interested candidates coming back and watching the progress of your concept. You should also test the website weekly to make sure all the forms are working and that the franchise inquiries are going into your CRM system in a proper manner. I'm always amazed when working with new clients the number of times that the phone number is incorrect, or that the form fills aren't working correctly. If this is not monitored often, it can be a costly mistake. The same attention should be given to the paid portals to ensure that the inquiries also are being transmitted correctly to your CRM system.

**2) Promotional materials.** Most promotional brochures and information are now digital, so make sure you update the files with current information, just as you have with your company website. Also make sure that any embedded links to articles and other information are working properly and that all materials are current.

**3) The FDD** is the most important document in the process for several reasons. Most important, it's the legal vehicle that allows you to offer franchises. It also can become one of your best sales tools—if you devote the time and effort to involving all the departments in your organization, ensuring that each section pertaining to them conveys the correct and current in-

**One of  
Murphy's Laws  
of Franchising is:  
"Franchisees  
will say  
good things  
about your  
system until  
asked by a  
candidate."**

formation on how the business operates today. Also typos and errors need to be discovered internally, which takes several sets of eyes proofreading the document. There's nothing worse than errors in the FDD that allow a candidate and their attorney to get the upper hand; nor will it leave a professional impression with the candidate about your attention to detail.

**4) Franchisee validation** is one of the most important steps in the process. Without good validation of the franchisor's systems, support, training, marketing, and an overall feeling of a partnership, it becomes very difficult to grant franchises to new candidates. One of Murphy's Laws of Franchising is: "Franchisees will say

good things about your system until asked by a candidate." That's a little tongue-in-cheek, but there's more validity to that statement than we may give it credit for.

As a franchisor, it's important to know how your franchisees perceive the system and the support so you can manage to those expectations—and not lose great candidates just because you didn't take the time to find out. Mystery shopping your franchisees to learn what is being said to candidates is an invaluable tool. Once you know how and what is being said to your candidates, 1) management can work at doing a better job in the areas that are lacking, and 2) you can set expectations for your candidates and help them prepare better questions.

It is important to communicate with your existing franchisees on what to expect from candidates when they are making the validation calls. It is even more important to coach your candidates on how and what to ask the existing franchisees. This is not an obligation of the franchisees, but a favor to the franchisor. Make sure your candidates understand the time limitations of your franchisees and that you've created a system for this process to follow. We've found that having your candidates send an email with potential questions and setting a time with an existing franchisee seems to be the most effective method for completing this step in the due diligence process. Several companies use passwords or some sort of key so that existing franchisees know the person is a viable candidate in the process and not a competitor shopping them.

**5) Discovery day** should be no more than a confirmation of the information gathered by the candidates during the research process. This information should be delivered by the franchisor's support staff and be organized so that it can also be placed in handouts for the candidate to take with them after discovery day.

Granting franchises to quality candidates takes a system that all participants are aware of and understanding the importance of accurate information. Take the time to review all of your steps and make sure your franchise system is the best it can be.

Happy Selling,  
Marc

# Market trends

BY PAUL WILBUR

## Transparency Ahead!

Prospects are demanding new levels of information

**P**rospective franchisees have lots of questions: How do I purchase a unit? Can I buy more than one? What will my territory be? How much does it cost? What are the royalty payments? How much training and ongoing support should I expect?

These are questions franchisors are accustomed to addressing and that regulatory documents confirm, but they are not the most important questions on the minds of prospects: How much can I reasonably expect to make? What is the likelihood I may lose my investment?

Franchisors find lots of reasons to justify not answering these two questions. That won't go on much longer. The market is rapidly requiring changes that will force franchisors to confront these questions. I offer three recent trends that clearly demonstrate a new level of transparency is moving to the forefront of the franchise business model.

One of the significant outcomes of the financial crisis for the franchise community was the change in information requirements by banks. Not only are banks requiring much more information about each borrower, they also are requiring much more information about the brand. This has led to terms like "continuity rate" and "revenue self-sufficiency." These franchise-specific terms didn't exist before 2008. Now bankers frequently refer to them. Performance matters.

The second trend involves franchise relations, the subject of many state legislative initiatives in the past few years. At the heart of the franchise relations debate is the franchise agreement; more specifically, the terms and conditions they contain. When do they cross a line that unduly inhibits a franchisee from

achieving success? I doubt state or local legislators are well-positioned to answer that question. However, I do think if the market is allowed to address this through transparency, the pressure will come off legislators to seek solutions that very likely will have many unintended consequences. The IFA took an important step in the direction of transparency with its Statement of Guiding Principles. Part of that movement was the recognition that franchise system performance standards are coming, sooner than later.

Finally, we are seeing an increase in "best of" lists that rank franchise systems. While many have evolved out of self-promotional motivations, not all have. Perhaps the most dramatic example of an objectively developed ranking was the recent *Forbes* article on the best and worst franchise systems. Frandata developed the criteria used to measure franchise system performance for that article.

In the rankings we created, we looked at many performance metrics including: Is there demand for the business? Are units successful over time? Does the franchise system offer support to its franchisees in areas like financing, marketing, and operations? We examined many factors and a lot of franchise information.

We realized that one recurring theme affected all the others: whether the franchisor shared enough information to assess its brand's performance. While the *Forbes* article highlighted 30 great brands, there are hundreds of others that are also excellent performers with enough information to understand why. Some underperformers provided enough information to understand why they were weaker—however, most of them lacked transparency. For prospective franchisees, that should raise troubling concerns. Without transparency, how

can a prospect determine how much can be made, or the likelihood of failure? How credible is a franchisor with a lot of units that have disappeared but that does not provide enough transparency to help a potential investor understand why?

We are rapidly moving into an era when franchisors must share performance information about their system—and about the franchisor itself—that goes beyond what an FDD requires. For instance, one criterion we examined about every brand was whether their FDD included an FPR. This part of the FDD is optional, and although 60 percent of brands provide this information, not all those in this group provide enough information to allow a prospect to determine how much they can make. However, the 40 percent group provides nothing. What does that tell a prospect? Most likely, either the franchisor doesn't know or doesn't want the prospect to know. Neither conclusion is a good reflection on the franchisor.

Information transparency is not just for prospective franchisees. Lenders need a business plan from the prospect. What confidence will a lender have in a business plan prepared by someone who has never been in that business when no brand unit performance information is available? Lenders know this information exists, that it is not constrained by the FTC Rule, and increasingly are asking for it directly from the franchisor. We call a franchise system that routinely provides this type of information to lenders a "lender friendly" brand.

In the very near future, the first question a prospective franchisee will ask is whether enough information is provided to make a smart investment. The market is quickly forcing changes that will allow prospects to make that determination against a set of performance standards. ■

*As COO at Frandata, Paul Wilbur has run the day-to-day operations and been part of the executive management team for more than 10 years. He has held technology and marketing roles at organizations including IBM, Digex, and Communities in Schools. Contact him at 703-740-4700 or [pwilbur@frandata.com](mailto:pwilbur@frandata.com).*





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# International

BY BILL EDWARDS  
& ROBERT SHAW

## Cultural Competence

To succeed abroad, learn—and respect—differences

**A** survey this year of the IFAs U.S.-based franchisor members showed that 82 percent are either already “going global” or are planning to take their franchise international soon. However, many U.S.-based franchisors new to international are unfamiliar with cultural differences between countries. In our experience in almost 70 countries, to successfully do business abroad you must be aware of the local culture and how it affects your franchise sales, operations, and revenues.

Businessculture.org says, “Culture illustrates the accepted norms and values and traditional behavior of a group... *‘the way we do things around here.’* The culture of each country has its own beliefs, values, and activities. In other words, culture can be defined as an evolving set of collective beliefs, values, and attitudes.”

To win in global business, there are three major cultural types you must take into account:

- **Linear** – aggressive, time is money, task-focused, individualistic, the “John Wayne” approach (North America, Australia, and Northern Europe);

- **Multi-active** – relationship comes *first* and *before* business, top-heavy hierarchy, only meet with decision-makers (Mediterranean, Latin America, Middle East, and India); and

- **Reactive** – relationships first, quiet nodding (nodding simply means they may understand what you are saying, not that they are agreeing with you), listeners, group decisions (Asia, except India.)

The aggressive “Let’s get the deal done and go home” approach that U.S. business people often follow leaves no time to develop the relationships that most cultures value—and require—to

get business done.

Therefore, cultural awareness and cross-cultural communication skills have become essential for successful new market entry and development. In the context of international franchising strategy and tactical execution, cultural considerations play a pivotal role in several critical ways that require the appropriate priority, preparation, and attention to detail.

**Cultural considerations play a pivotal role in several critical ways that require the appropriate priority, preparation, and attention to detail.**

Consider cultural implications when marketing, messaging, and ultimately serving your customers in a specific market. This begins with the brand name and logo. How will the standard domestic brand name and logo be perceived in the market through both linguistic and cultural filters? It’s understandable when an unknown brand name has no meaning or immediate market impact value. However, it’s quite another matter when a translated or phonetic articulation of the brand name conveys a pejorative,

awkward, or even embarrassing message in the new market. Similarly, for food brands menu items such as pork in the Arab world and both pork and beef in India must be eliminated from menus. Sweet and spicy taste preferences also vary by country.

Numerous cultures do not place a high priority on providing full financial details at the initial discussion stages for reasons of confidentiality and the lack of an established trust. Such trust usually comes only with time, positive communication, and increasing rapport; you must earn it. The time required for this can be significantly greater with Asian cultures (especially in Japan) than with Anglo or most Latin cultures.

Before conference calls, discovery day meetings, and market visits, it is highly advisable to invest time to learn, and then implement with care, the basic cultural behavior of your candidate, just as you invest time to study their marketplace. This demonstrates that you value their culture, and therefore your relationship with the candidate and their country’s market.

Whereas Western cultures tend to communicate directly and concisely, Eastern cultures, especially the Japanese, are more likely to use indirect communications that may be frustrating to U.S. franchisors. However, do not interpret what seems to be an evasive style as an attempt to deceive or confuse you in negotiations. Instead, realize it is more likely that there are reasons the candidate is not comfortable with or capable of providing a definitive answer. In certain circumstances, patience is indeed a virtue, and a desirable attribute.

Cultural differences often extend into contractual matters, such as the franchise agreement. Nearly all other cultures find U.S. franchise agreements to be laboriously and perhaps unnecessarily too long. This perception exists for different reasons. For example, in some countries a standard civil code or law is assumed in their domestic contracts, and similar clauses and verbiage are not customarily included in their agreements. Or, in some cultures, the agreement is expected to confirm the nature of the *relationship*, rather than detail every possible task or

event, as may be attempted in the U.S. In any case, it is very helpful to use your cross-cultural skills and relationship with the candidate to preempt and hopefully neutralize a likely negative reaction to a voluminous agreement by discussing the matter with your key contact(s) before delivering it.

**To-don't list**

Here are a few cultural “no-no’s” we have encountered over the years:

- giving white flowers as a gift in Japan (white is the color for funerals);
- showing the bottom of your shoes in the Middle East (dirtiest thing you can do);
- referring to Taiwan as a country when in China; and
- talking politics (sports and local culture are better topics).

Terri Morrison, in her classic book, *Kiss, Bow or Shake Hands*, shares a few basic, but critical, cultural differences in doing business in key countries. In regards to meetings:

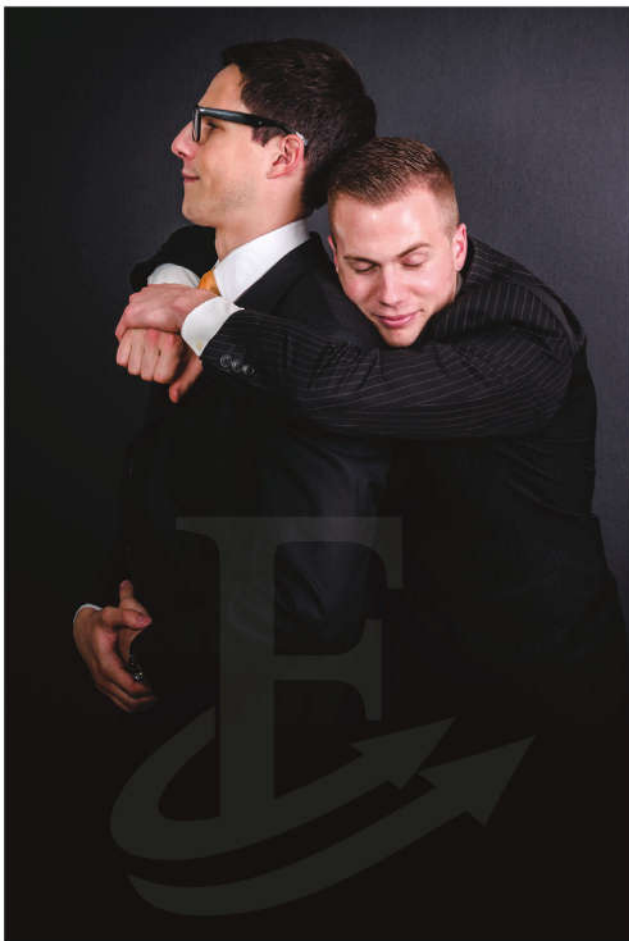
**To succeed in global business you must add the cultural factor to your approach to people and companies. Ignore the local way of doing business and you will fail.**

- in **Brazil**, lack of punctuality is a fact of life, so be flexible about your counterpart’s (lack of) punctuality;
- in **China**, punctuality for all appointments is important; and
- in **India**, business people appreciate punctuality, but do not always practice

it themselves!

The bottom line? While business processes may be flattening around the world, cultures are not. To succeed in global business you must add the cultural factor to your approach to people and companies. Ignore the local way of doing business and you *will* fail. Cultures are what make the world an increasingly interesting place! ■

**William G. Edwards**, CEO of EGS, LLC, has 40 years of international business experience. He has lived in 7 countries, worked on projects in more than 60, and has advised more than 50 U.S. companies on international development. Contact him at 949-375-1896, [wedwards@egs-intl.com](mailto:wedwards@egs-intl.com) or read his blog at [edwardsglobal.com/blog](http://edwardsglobal.com/blog). **Robert Shaw**, executive advisor of international business for Right at Home International, an in-home care and assistance brand, has more than 25 years of international business development experience in 50-plus countries. Contact him at [rsbaw@rightathome.net](mailto:rsbaw@rightathome.net) or 949-481-7430.



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# It's closing time

BY STEVE OLSON

## Let There Be Sales

10 commandments for explosive growth

**1. Successful brands sell during boom and bust times.** Whether it was the Gulf War, dot.com bomb, Katrina, or Great Recession, veteran brands know that change is constant, and that long-term growth is the ability to re-evaluate, adapt, and tackle economic storms. "Waiting for things to get better" is the road to brand erosion. You can't change the economy, but you can change yourself. To paraphrase Bob Dylan, "The times they are *always* a-changin'."

**2. Satisfied, profitable franchisees drive recruitment.** More than 100 franchise brands confirmed that strong growth is the direct result of satisfied franchisees making money, according to Franchise Update's 2014 Annual Franchise Development Report. The study further notes that franchise concepts without compelling FPRs in their FDDs are losing out. Who says? Multi-unit prospects, lenders, CPAs, attorneys, landlords, your sales team, franchise brokers, and more.

**3. Poor validation? Stop selling and fix the problem.** Over the years I witnessed at least three brands refusing to suspend their development efforts, even though they had major system issues. Why waste costly time and dollars, not to mention embarrass your brand reputation with turned-off buyers? Bad news travels. Use those recruiting dollars to fix your problems. Then it's time to turn *on* your buyers and start closing deals again.

**4. Target prospects who can thrive in your business.** Ninety-eight percent of buyers are not the right fit for your franchise, so focus on those most likely to succeed. Profile their backgrounds, qualities, skill sets, characteristics, traits, and acumen to excel in your franchise.

Are they compatible matches who can mirror your performing franchise operators? In short, shotgun marketing is too expensive and frustrating for you and misdirected buyers.

**5. Excite buyers with a compelling opportunity.** Rise above the waters and showcase your advantages and differentiators. If you don't, you'll drown your concept in the sea of sameness with meaningless content. In a recent review of 90 franchise websites, more than 65 percent promoted the same story about their offerings: *Our equipment is state of the art. We provide excellent training and assist you every step of the way. Our menu features the highest quality food products. We provide excellent marketing materials.* Ho hum... What franchise doesn't?

**6. All roads lead to your website.** Franchising's greatest recruiting tool is your recruitment website. Invest whatever it takes to present an engaging, motivating, and response-driven site. It pays off! Because the Internet levels the playing field, emerging brands with impressive sites have the opportunity to compete with—and beat—household brands for serious buyers. It's the Broadway stage to showcase your lesser-known opportunity. Craft one of the top two or three sites in your competitive category and you will generate more qualified prospects.

**7. Wasting dollars? Recruit more and spend less.** Continue to test, execute, and measure to improve your lead generation performance. Toss the marketing losers and beef up the winners. Know your cost per sale, cost per discovery day, and cost per application. This is how to create predictable budgets for achieving realistic goals. You can't improve what you don't measure,

and you can't measure what you don't know. Without analytics you're in the dark. If you haven't, install a franchise sales management system ASAP.

**8. Reward sales performers. Fire mediocrity.** Losing qualified candidates costs your brand thousands of dollars in marketing expenses and lost royalty fees. Your sales executive's role is invaluable as the spokesperson, counselor, and primary representative of your brand. Don't settle for mediocre. Your salespeople must be solid producers. Recruit or develop top sales talent. If needed, hire an accomplished franchise sales trainer to "fast track" the learning cycles for new recruits. It's worth the investment.

**9. Your best sales close starts with your opening.** Set expectations as soon as you receive a potential prospect's application. Leadership is the critical key to successful closes. As the pros know, *now* is the time to take control of the process, or your candidate will! Chasing is wasting. If they don't follow your lead, they won't follow your systems and procedures. Emphasize open, honest communication and together decide whether your franchise opportunity is the right fit. Buyers will appreciate you are focused on their success and prepared to say "no" if they are not a match for your brand.

**10. Culture and community accelerate growth.** Today more brand leaders are moving toward holistic franchise environments embracing their corporate mission, customer channels, and community causes. Visionary CEOs are tearing down their departmental silos, replacing them with collaborative communication platforms that better serve their audiences. Emphasis is on transparency and accountability, with the intent to drive the success of their franchisees, employees, and brand. And to no one's surprise, it's working. ■

*Steve Olson is a 30-year franchise veteran specializing in development performance. He is the author of the #1 Amazon best-seller, Grow to Greatness: How To Build a World-Class Franchise System Faster, available at [www.growtogreatness.net](http://www.growtogreatness.net). He can be reached at [stevenolson@charter.net](mailto:stevenolson@charter.net).*

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## IN MEMORY OF TIMOTHY ARLAN GARDNER



The Gardner Family and the entire Franchise Update Media team would like to extend our deepest gratitude for the kind words, condolences, and offers of support around the recent loss of Tim Gardner, son of our founders Therese Thilgen and Gary Gardner.

A car accident tragically and suddenly took Tim away from us on June 11, 2014.

Tim was a fun-loving, caring, and kind person who was loved by many people. Among them of course were his parents, his brother Mike, the love of his life Christa Pulling, and virtually everyone who knew him during his life.

Many of you in franchising had the pleasure of watching Tim grow into one of the most creative talents in the industry. As Executive Video Producer for Franchise Update Media, Tim created many of the creative conference and online productions we have all enjoyed. Tim's ability to make people comfortable resulted in the documentation of some of the most powerful and telling franchise success stories. He was a true talent and his work lives on in video.

We are all better people for having known Tim. He will be deeply missed and will live in our hearts Forever Young.



*Below are two philanthropic programs near to Tim's heart that you may donate to in Tim's name:*

HABITAT FOR HUMANITY OF EAST BAY/SILICON VALLEY  
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*Please send any cards of condolences for Therese and Gary or Christa to the following address  
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Franchise Update Media  
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*See more at: [www.franchising.com/tg/](http://www.franchising.com/tg/)*

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