

## Franchise Investigative Process

With over 3,500 registered franchise companies available in the United States, determining the **right** one can certainly seem like a daunting task. I am fortunate to have a wealth of resources and *INSIDER* information at my disposal.

The reality is that some franchise brands are amazing, some are mediocre, and some are bad. Working with me as a coach, we will not waste valuable time on bad brands, poor performing brands, or high-risk brands.

Take advantage of my **free one-on-one coaching program**. Within a few hours of work together, we'll be discussing top performing brands that match you and your goals.

## Overview of Investigative Process

I spent several years in the investment banking world performing due diligence on hundreds of target companies. We followed a very detailed process--a road map that made our job easier and more efficient. Good Processes = Time Efficient and Good Results.

My one-on-one coaching program facilitates an investigative/learning process that requires a few hours a week. In most cases, we will be able to pinpoint 2-3 brands of high interest within a few weeks. And, most of my clients will narrow it down to a top brand within 6-8 weeks.

Throughout the process, we are continuously building general franchise knowledge through a variety of means (i.e., videos, webinars, books) and learning what to look for in top performing franchise brands.

I cannot do the investigative/learning process for you. However, I do coach, mentor and provide a valuable, third-party perspective throughout the process. And, I promise to always provide honest and transparent information.

### Step 1

After a short initial conversation, I will ask you to fill out an online confidential questionnaire on a secure web site that will take you approximately 20 minutes. This provides me with a great deal of information about you and enables me to start identifying brands that match your initial business profile.

### Step 2

We will schedule a follow-up telephone consultation of 45-60 minutes to review your completed questionnaire and develop the **key criteria** for your **ideal business profile**. This is different for each person and is based on your skills, experiences, finances, goals, interests, and geographical factors. We will use this ideal business profile throughout the investigation process to compare against each brand you investigate.

### Step 3

We will schedule a webinar where I will provide an overview of 4-5 top performing brands that match well your ideal business profile. We will discuss the brands together and make sure you understand the role of the owner for each brand. We will identify 2-3 brands that you would like to investigate further.

It's important for you to also learn about your funding options. I will put you in touch with a professional at a top funding company that will explain the various programs that are available to you (i.e., retirement rollovers, SBA loans, equipment leasing, HELOCs, and more). Learning about your funding options is also **free**.

#### **Step 4**

I will introduce you to the brands you wish to investigate further. I will make sure you are working with the **right** person at each brand, and you are treated like a **VIP** candidate. Each brand typically will schedule a one-on-one call with you each week. They will explain their information exchange process with you on the initial call.

Each week you will be learning more and more about franchising and the specific brands of most interest to you. We will catch up each week with a telephone call and/or email. We will review your progress, and discuss what you are learning from each brand. We will compare/contrast your ideal business profile against each brand. If a brand after a few calls is not tracking well, then we will simply put it on the sidelines.

#### **Step 5**

Franchise validation is when you talk directly to existing franchise owners. This is an invaluable way to get unfiltered information on the overall franchisee satisfaction and financial performance of a franchise brand. Validation allows for you to determine if a franchise brand is delivering on its promises, and most importantly, you can validate the financial success of franchisees.

#### **Step 6**

After weeks of information gathering and investigation, you will have narrowed it down to your top brand. You will be invited to attend a Discovery Day (sometimes referred to as Meet the Team Day). Discovery Days are usually held monthly at the corporate headquarters of a franchise brand. This is where you meet the executive management team, and learn a bit more about the company culture and where they are driving the brand.

Shortly after a Discovery Day, if all goes well, then you will be invited to join the franchise. You will be expected to make your decision within a few days of their invitation.

*Leverage my INSIDER knowledge, experience, and contacts to explore franchise investing. After 26+ years in the franchise industry, I have learned a few things that potential investors find extremely valuable and time saving.*

### **Helping People Achieve Goals Through Franchise Business Ownership**

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*No hype, no fees, no BS... just accurate & valuable information.*

