

Legal & Administrative:

___ Establish Legal Entity (LLC or S-Corporation is Recommended)

___ Open Checking Account

___ Obtain Insurance-General Liability: General liability insurance is not required but is recommended for all associates. This is totally different from Errors and Omissions Insurance. You should be able to find a policy for around \$250.00. We ask that if procured that you name the office owner and FranNet, LLC as an additional insured. If you have more questions, please contact phardin@frannet.com.

___ Broker registration (New York) To be completed *within 60 days of your effective date*. The NY Form can be found [here](#).

___ [FranGuard](#) Class - \$395.00. To be completed *within 180 days of your effective date*.

___ Review the training call, "[Know Your Legal Limits](#)" by Joe Dunn.

___ Submit information for consultant page using the [Consultant Page Request Form](#). Do this after our first checklist pre-training call.

Specifics for Headshot photo:

The photo must meet these guidelines to be used:

- A solid, bright, white back drop.
- No other background colors, objects or shadows.
- High resolution of 300 dpi.
- Attire can be business casual such as golf shirts or as formal as a suit and tie.
- We encourage you to be comfortable and casual in the shot.

___ Training Fee Paid to FranNet LLC. (Due 10 days prior to training)

The Vault:

Go to the Vault and follow along the New Associate Training steps. Also explore additional training resources: <http://frannetsecure.com/thevault/>

Computer & Other Equipment Requirements:

___ Obtain a laptop – **Bring to training.**

___ Install Anti-Virus Software for PCs

___ Purchase or have access to LCD Projector

___ Purchase or have access to Scanner

Introduction to the Franchise Industry:

_____ [International Franchise Association](#): Celebrating 58 years of excellence, education and advocacy, the International Franchise Association is the world's oldest and largest organization representing franchising worldwide. IFA works through its government relations and public policy, media relations and educational programs to protect, enhance and promote franchising and nearly 733,000 franchise establishments that support nearly 7.6 million direct jobs, \$674.3 billion of economic output for the U.S. economy and 2.5 percent of the Gross Domestic Product (GDP). IFA members include franchise companies in over 300 different business format categories, individual franchisees and companies that support the industry in marketing, law, technology and business development.

_____ [IFA Smart Brief](#): Created by SmartBrief, a business news publisher, in partnership with IFA. It is a 3x/weekly snapshot of the franchise industry with news from Bloomberg Businessweek, Entrepreneur, QSRMagazine.com and other leading sources. Summaries of what matters to you, written by expert editors, to save you time and keep you informed and prepared. Now you can keep current with your industry without having to sift through the news every day. You don't need to be a member of the association to take advantage of this free service.

_____ Take free courses at <https://ifa.tortal.net/> *Click on, "Browse Training" in the green bar area by the search bar. From here you can access a few free courses that cover franchising basics. All FranNet consultants are IFA members, so you should be able to register (at no cost) and view even more courses.

_____ [IFA Franchise Toolkit](#): This course covers important information like how to determine if franchising is right for that individual, the franchising process, goals and preference, conversations with the franchisor, the franchise disclosure document, and additional recourses. While it is mostly geared toward potential buyers, it is also a great educational resource for new FranNet consultants. (To access if the link doesn't work: Go to <https://ifa.tortal.net/> > Training > Franchise University Courses > IFA Franchise Toolkit

Resources to Consider:

- [Sandler Training](#): Reinforcement accelerates real growth. That's why Sandler takes an approach to training that is scientific, methodical, proven and designed to accelerate your learning path. Sandler calls it, "reinforcement training." It uses repetition to help clients understand the principles and strategies that form their selling system, and then to develop the skills to put those strategies into action, and apply them in day-to-day business situations.
- [Institute of Certified Franchise Executives \(ICFE\)](#): The mission of the Certified Franchise Executive (CFE) is to enhance the professionalism of franchising by certifying the highest standards of quality training and education. CFE offers a wide range of continuing education programs for professional development. Meeting the requirements of the program and completing the course of study leads to the CFE designation.

The CRM (FranConnect):

____ Study and become familiar with FranConnect navigation and contents of FranConnect Library (Intranet < Library).

____ Study and become familiar with the PowerPoint Business Models (12 different models). (Intranet < Library < Training < Business Models).

CRM ➡ PFA Dashboard:

____ Review all personalized FranNet links via your FN (FranNet) Hub Single Sign On link. Go to the Hub > FranNet PFA Dashboard. **Send Megan your completed PFA**

PFA Resources in CRM:

____ Review the PFA (Personal Franchise Assessment) review calls in the FC (FranConnect) Library (Intranet < Library < Training < PFA Training < PFA Review Calls).

CRM ➡ Zor Portal:

____ Review the Active Franchisor Partners on the [ZorPortal](#). Also review with Office Owner.

____ Create a "Horses List" (think your go-to list of zors) with your Office Owner. Minimum of 15-25 "horses" aka franchisors. **Bring your list to the HQ training session.**

____ Review the Franchisors 2-Minute Drills in the ZorPortal.

____ Review available Webinars from Franchisors in the Vault.

Seminar Resources in CRM:

____ Review Seminar Videos in FC Library Training Folder (Intranet < Library < Training < Seminar Videos).

____ Download FranNet Seminar PowerPoint Presentations (Intranet < Library < Webinars < Business Exploration Presentations (BOE) < 2019 BOE Presentation).

____ Review the editable 2019 BOE Presentation PowerPoint that you just downloaded. Edit slide 2 (Intro Slide) with your picture and relevant bullet points of your background. Save to your laptop for review in training.

Coach/Office Owner:

____ Schedule day/time for weekly calls with Coach/Office Owner.

____ Attend at least 3 different Public Seminar's with Coach/Office Owner. (Some may have to be completed after training)

____ Attend at least 5 face-to-face client meetings with Coach /Office Owner. (Some may have to be completed after training)

____ Build a business model with your Coach/Office Owner based on your completed PFA on file with them.

Networking/Building a Database:

____ Compile list of all Outplacement Firms, career centers, networking groups, governmental agencies, Strategic Referral Partners etc.

____ Enter Information into FC Lead Management.

Marketing Materials and Other Important Documents:

____ Review the [Operations Brand Standards Manual \(Vault < Training+ < Operations Manual < Virtually Sign < Download\)](#).

____ Review the social media policy (Intranet < Library < Marketing < Guides < FranNet Social Media & Internet Policy).

____ Download the FranNet General Brochure, Roadmap and the SCORE Roadmap. (Intranet < Library < Marketing < Guides/Flyers and Handouts).

____ Order FranNet Business cards, pocket folders and any other supplies that may be needed (Intranet < Related Links < FranNet Online Catalog < [QuantumGraphix](#)).

____ Review Marketing folder in FranConnect to download materials, logos, flyers and important handouts (Intranet < Library < Marketing).

____ Prepare Intro kits (Bio, business card, handout or guides) to use with the lists you compiled for outplacements, SCORE, SBDC and all key contacts in your market.

WORKSHEET A
PFA Review Calls:

1. Name _____ Date _____
2. Name _____ Date _____
3. Name _____ Date _____
4. Name _____ Date _____

WORKSHEET B

Public Seminars Attended:

1. Organization _____ Date _____
2. Organization _____ Date _____
3. Organization _____ Date _____
4. Organization _____ Date _____
5. Organization _____ Date _____
6. Organization _____ Date _____

WORKSHEET C

Client Appointments Attended:

1. Client Name_____ Date_____
2. Client Name_____ Date_____
3. Client Name_____ Date_____
4. Client Name_____ Date_____
5. Client Name_____ Date_____
6. Client Name_____ Date_____
7. Client Name_____ Date_____
8. Client Name_____ Date_____
9. Client Name_____ Date_____
10. Client Name_____ Date_____
11. Client Name_____ Date_____
12. Client Name_____ Date_____

WORKSHEET D

Horses List:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

WORKSHEET E

Lead Sources:

Examples: Outplacement, Personal and Professional Networking Groups, Referral Partners, SBDC, SBA, SCORE, Chambers, etc.

Name	Company/Organization Name	Contact Information	Address

Enter these contacts/leads into FranConnect’s CRM by creating a client record.