

FranNet Client Assessment

CONFIDENTIAL

FranNet Consultant: Carol Ward

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PERSONAL INFORMATION

Home Phone:		Best place to call:	Cell
Cell Phone:		Marital Status:	Married
Email:		Number of children/dependants:	2
Sex:	Female	US or Canadian Citizen:	Yes
Date of Birth:		Are you a veteran:	No
Own/Rent:	Own		
How long:	11 (yr/s)		

Spouse Name:	[REDACTED]
Spouse Occupation:	Chiropractor
Education:	Bachelors Degree
Most recent business or employment:	
Company Name:	AstraZeneca
Position held:	Pharm. Sales
Most recent annual income:	\$ 100,000

Have you ever owned your own business?
Yes

How long have you been looking for a business?
not long

What business(es) have you looked at?
Have not looked at any

What attracted you to this/these business(es)?
[REDACTED]

How will you know when you have found the right business?
Right combination of factors

How much time can you devote to working in your business?
Currently stay at home mother, so lots.

Greatest business achievement?
Advancement to Specialty Sales in a very competitive field. Opening a business with my siblings from the ground up

Please describe the most important things to you in choosing a business?
Security

Area(s) Preferred(City/State/Province)
Louisville, KY

[REDACTED]

Professional affiliations and hobbies?
[REDACTED]

How did you learn about FranNet?
[REDACTED]

Upload your resume: No

BUSINESS CHARACTERISTICS

Tell me about a work situation in which you were the happiest?

Freedom to make my own decisions and income potential that makes all my hard work worth it

What did you like least about your past job or business?

Not stable

Things you want to avoid when considering a business?

Businesses that have over saturated the market like frozen yogurt bars

If 1 is low and 10 is high, how do you rate your sales ability? 9

If 1 is low and 10 is high, how do you rate your sales interest? 10

If 1 is low and 10 is high, how committed to being in business in the next 6 months are you? 8

Based on experiences your strengths are:

Sales, people skills, organization, hard working

Your weaknesses are:

patience

To ramp up my business quickly, I enjoy spending much of my time out in the field, personally initiating contact with potential customers and strategic referral partners. I am comfortable reaching out by phone and visiting my customers' place of business.:

No

I enjoy spending time out in the corner of networking events on a monthly basis such as the chamber of commerce, trade shows, industry organization events, and trade shows. I can walk into an event and walk out having initiated contact with several potential customers or strategic referral partners.:

Yes

My retail location and/or advertising (print, tv, radio) is the primary prospecting strategy. Once a potential customer has called me or walked into my store, I am comfortable interacting with him or her, answering questions, asking for the sale, and training my staff to do the same.:

Yes

Would you enjoy owning a business where you (check all that apply):

Consult: Yes

Sell: Yes

Market a product or service: Yes

Are you interested in multiple units? Yes

My initial involvement would be as: Owner/Operator

My long term involvement would be as: Owner/Operator

Will your spouse/other family member be actively involved? Yes

My ideal business would look something like this (please check most appropriate answer in each case):

Proven, easily replicated, system	Somewhat
Recognized franchise brand	Somewhat
Potential for significant growth	Important
Professional or trade preferred	No Preference
Interested in (check all that apply)	Food,Automotive,Education,Service,Retail,B2B
Business location is based at	Don't care
Business environment	
Customer type desired	Anyone
Employee type desired	Don't care
Number of employees	5 to 9
Product versus service	Both/either
Your cash investment level	100k+
Time frame for being in business	3-6 mos
Time frame for deciding	1-3 mos
Who will make the decision (check all that apply)	Me,Spouse
Your need for personal income	1+ year

FINANCIAL INFORMATION

Assets

Liabilities

Cash in checking account	\$ 10,000	Notes payable to banks	\$ 9,000
Cash in savings account	\$ 30,000	Notes payable to finance companies	\$ 0
Stocks and Bonds	\$ 40,000	Charge Accounts	\$ 0
IRA	\$ 160,000	Credit Cards	\$ 3,000
401k's / RRSP's	\$ 50,000	Taxes Payable	\$ 0
Real Estate Value (Home)	\$ 375,000	Mortgage,Residence	\$ 0
Real Estate Value (Other)	\$ 0	Mortgage,other	\$ 0
Automobiles	\$ 60,000	Due on Automobiles	\$ 0
Other vehicles	\$ 0	Due on other vehicles	\$ 0
Your own business	\$ 150,000	Other Liabilities:	
Appraised Collectibles	\$ 20,000		
Money due you	\$ 10,000		
Other assets	\$ 0		
Total Assets	\$ 905,000	Total Liabilities	\$ 12,000

Net Worth: \$ 893,000

Liquid Capital: \$ 50,000

Amount to Finance: \$ 0

Total Investment: \$ 0

Do you have any additional income sources? **No**

Please explain:

Who do you know that would benefit from the services offered by FranNet?

Name: _____

Phone: _____

Client at a Glance

Values / Motives			
<i>Belonger</i>	<i>Achiever</i>	<i>Societal</i>	<i>Emulator</i>

Compliance			
<i>Low</i>	<i>Average</i>	<i>High</i>	<i>Very High</i>

Core Competencies				
<i>Administration & Management</i>	<i>Sales & Promotion</i>	<i>Marketing & Advertising</i>	<i>Technical & Product Knowledge</i>	<i>Client Management & Support</i>

Work Style			
<i>Director</i>	<i>Promoter</i>	<i>Collaborator</i>	<i>Thinker</i>

Focus Preference			
<i>Aware</i>	<i>Focused</i>	<i>Strategic</i>	<i>Systematic</i>

Leadership Style			
<i>Autocratic</i>	<i>Paternalistic</i>	<i>Democratic</i>	<i>Laissez-faire</i>

Sales Potential				
<i>Low</i>	<i>Average</i>	<i>Above Average</i>	<i>High</i>	<i>Very High</i>

Business Development				
<i>Contractor</i>	<i>Entrepreneur</i>	<i>Single Unit</i>	<i>Multi-Unit</i>	<i>Area Developer</i>

Sales Orientation		
<i>Consultative</i>	<i>Relational</i>	<i>Competitive</i>

Values and Motives

Values and Motives

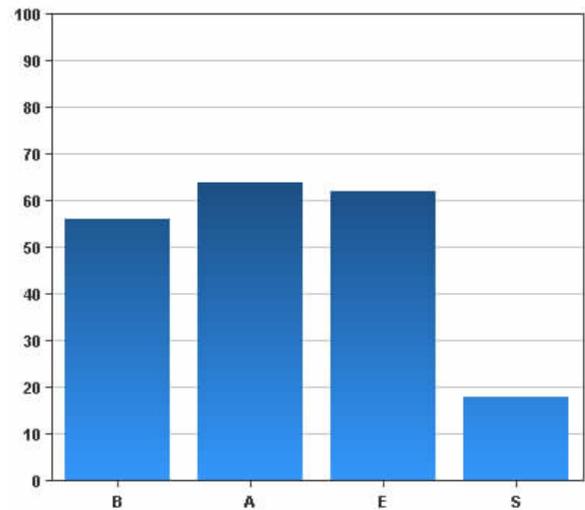
Motives are the only true predictors of behavior and performance. The **BASE Assessment** measures Buyer Motives and Value Sets which determine what about the self is the meaningful core that governs desires and the expression of those desires in life and business.

Value Sets and Motives: Achiever-Emulator

Jennifer is a tenacious business builder driven to dominate the market. Motivated by the desire for status and achievement, people in this group have goal-oriented lifestyles and deep commitment to success. Control and money defines success for the Achiever-Emulator. They favor classy or unique business-to-business replicable concepts with strong growth potential.

Fearless and action oriented, the Achiever-Emulator will at times challenge processes deemed ineffective and implement their own systems. They respect time, numbers, systems and their competition in their ongoing drive to be the best. Great strategic planners and decision makers they abide by results based plans long into the future. Adversity seems to strengthen their convictions.

Direct and to the point, as a business person Jennifer might prove intimidating but nonetheless respected. Capable of wearing many hats, the Achiever-Emulator has high expectations and demands, both of themselves and of others. In the end it is about results, making a profit, and setting themselves apart. It is not necessary for others to like them but it is a mistake to not to heed their counsel.



Values and Motives

Values

It has been established that it is an individual's personal value system which directly dictates his or her motivations.



Hierarchy of Values

Based on assessment results here are Jennifer's values:

- Success
- Results
- Achievement
- Independence
- Loyalty*
- Control

Values italicized (if any) are Wild Cards. These values(s) may indicate a recent change, something amiss or redirecting of focus. Wild card values will have greater emphasis or attention given them during current situation, and may reposition in hierarchy once that value is expressed.

Work Style

Work Style

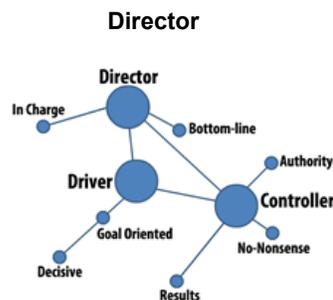
The **Work Style Assessment** measures those aspects of personality pertinent to running a business, including managing time and resources.

Work Style: Director

Scores indicate Jennifer is a Director. People in this group are driven by two things: the need to control and the need to achieve. They are goal-oriented and most comfortable when in charge of people and situations. They want to get things done, so they focus on no-nonsense approaches to bottom-line results.

Directors seek expedience and are not afraid to enforce or bend the rules. They accept challenges, take authority, and plunge headfirst into solving problems. Others naturally respect their leadership and decisions and come to them for advice.

In a crisis they are the one to take charge. They are fast-paced, task-oriented, and work quickly and effectively by themselves, which might mean they can become annoyed with delays or incompetence. They are willing to challenge outdated thinking, systems and ideas.



Work Style

Work Style

	Director	Promoter	Collaborator	Thinker
Pace	Fast-Decisive	Fast-Spontaneous	Slower-Relaxed	Slower-Systematic
Priority	Goal	People	Relationship	Task
Seeks	Productivity, Control	Participation, Recognition	Acceptance	Accuracy, Precision
Strengths	Administration, Leadership, Pioneering	Persuading, Motivating, Entertaining	Listening, Teamwork, Follow-through	Planning, Systemitization, Orchestration
Fears	Being taken advantage of	Loss of social recognition	Sudden changes, instability	Criticism of their work
Irritations	Inefficiency, Indecision	Routines, Complexity	Insensitivity, Impatience	Disorganization, Impropriety
Under Stress May Become	Dictatorial, Critical	Sarcastic, Superficial	Submissive, Indecisive	Withdrawn, Headstrong
Gains Security Through	Control, Leadership	Playfulness, Other's approval	Friendship, Cooperation	Preparation, Thoroughness
Measures Personal Worth By	Impact or results; Track record and progress	Acknowledgements; Applause; Compliments	Compatibility with others; Depth of contribution	Precision; Accuracy; Quality of results
Workplace	Efficient Busy Structured	Interacting Busy Personal	Friendly Functional Personal	Formal Functional Structured

Focus Preference

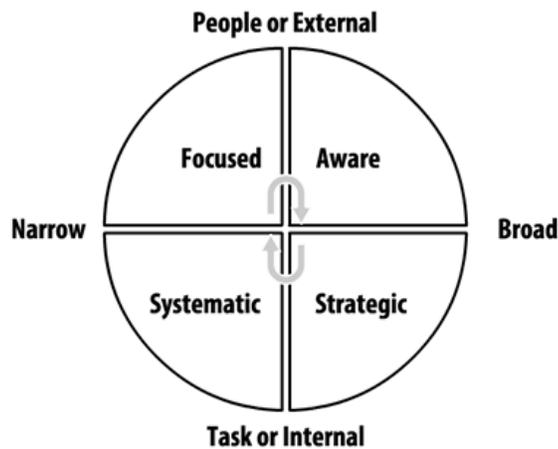
Focus Preference

Nothing is more basic to performance, or more critical to success, than the ability to concentrate. The **Focus Preference Scale** measures basic concentration skills.

Focus Preference: Focused

This kind of concentration is used to execute, to get the job done. Jennifer is:

- Focused on executing and achieving desired outcomes
- Good at intensive short-term goals and projects
- Excellent problem solver
- Responsible and learns from mistakes
- Easy going, diplomatic, team player



Leadership, Rules, and Compliance

Leadership Style

The **Leadership and Rules Assessment** measures leadership style and the ability make and/or follow rules.

Leadership Style Paternalistic

This form of leadership, rule making or management is essentially dictatorial.

Decisions and rules tend to be in the best interests of the employees rather than the business.

Leader explains most decisions to the employees and ensures that their social and leisure needs are always met.

Can help balance out the lack of worker motivation caused by an autocratic management style.

Feedback is generally downward; however feedback to the management will occur in order for the employees to be kept happy.

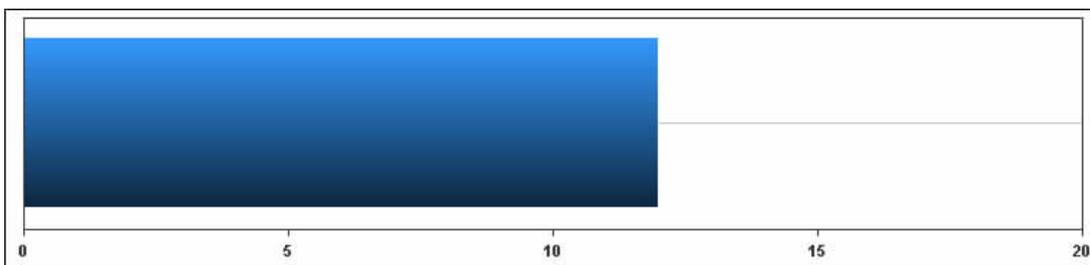
Advantage: can engender loyalty from the employees, leading to a lower labor turnover, thanks to the emphasis on social needs.

Disadvantage: employees becoming dependent on the leader, and if the wrong decisions are made, then all employees may become dissatisfied with the leader.

Compliance Ratio

It is important to understand a candidate's ability and willingness to comply with systems, procedures, policies, standards and regulations. Some systems are still dynamic and evolving thus policies and procedures not firmly instilled while other systems have precise rules, regulations and policies for doing business.

Compliance Ratio: HIGH



Scores indicate Jennifer has a HIGH compliance for Systems, Rules, Standards and Financials.

Core Competencies

Core Competencies

Highlighting competencies is not so much to alert one to skill sets but instead to determine if franchisor and business owner have complementary competencies.

Primary: Client Relationship Management and Support

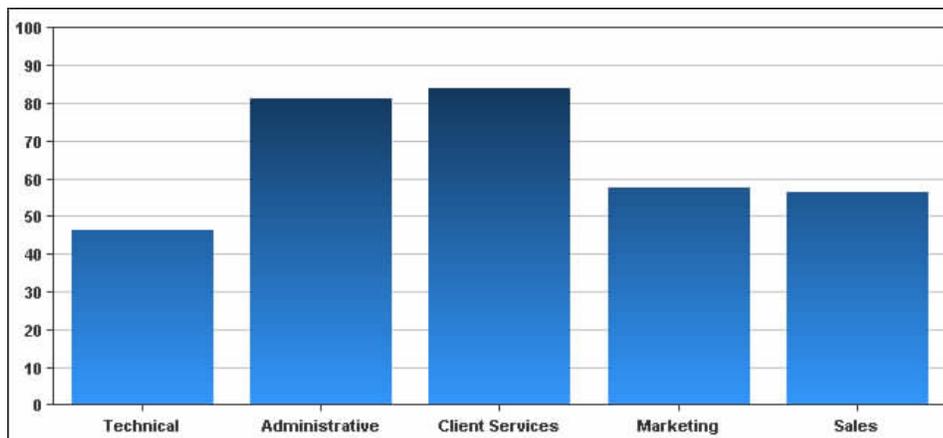
Jennifer has strong client relationship management skills. People with these skills have a strong work ethic based on dedication and passion for taking care of customers. They are aware of their internal and external customers and committed to supporting their goals and desires.

They are self-motivated, flexible and goal oriented. They have excellent communication skills and leadership ability. They are good listeners, problem-solvers and understand quality service is the competitive advantage to attracting clients and retaining business.

Secondary: Administrative and Management

Jennifer has strong human resource management and administrative skills. People with these skills are good decision-makers, problem-solvers and natural leaders. Their talents include hiring, managing, training, supervising and developing people. They are able to organize information, budget and plan.

They recognize, refine and implement best practices. They are articulate in all forms of communication including speaking and writing. They are technically competent and self-managed. Their advice and direction is respected and followed.



Meta Programs and Strategies

The **Meta Programs Assessment** measures primary strategies or filters an individual uses to communicate, assess information and make decisions.

Direction Sort: **Balanced**

Scores indicate Jennifer is both Toward and Away From. People in this group are focused on their goals, while noticing things that should be avoided, gotten rid of or fixed. They are motivated to have, get, achieve and attain. They tend to be good at managing priorities. They are excellent at trouble shooting, problem solving and pinpointing possible obstacles. Only 20% of the population score this way.

Frame of Reference: **External**

Jennifer is an External. People in this group are receptive to outside direction and feedback. In fact to be motivated they want to know how well they are doing. They carefully weigh out feedback from various sources as they critique and fine-tune tasks, processes and themselves. Since they are open to feedback and critique on how well they are doing, as managers they tend to give feedback to others.

Task Attitude: **Procedural**

Jennifer is a Procedural. These people like to follow set rules, processes and systems. Once they understand a procedure they will repeat it over and over again. They are focused on the how of doing something and desire to master it and become proficient. Bending or breaking rules is heresy.

Chunk Size: **Global**

Scores indicate Jennifer is an individual who prefers having the big picture. Big chunk thinking is useful for envisioning, perspective and setting direction. It can take in broad patterns and trends and make associations between them for the benefit of the whole.

Communication Style: **Auditory**

Professional
Disciplined
Succinct
Intimidating
Respect

Uncompromising
Authority
Bottom-line
Conservative
Controlled

Business Needs and Best Suited

Needs and Wants in Business

- Strong and credible leadership and management
- Quality and consistency in product, service and company
- Desire to impact policy and procedure
- Ability to replicate
- High growth potential
- Own market share
- Professional control
- Equity and/or Exit strategy

Businesses Best Suited

- Medium risk with growth potential
- Classy, unique or different
- Management or absentee ownership
- Business-to-business
- Can control or dominate marketplace
- Long term opportunity
- Doesn't mind competition
- Location and/or market important
- Image less important - service based okay
- Few employees