

# FRANNET CLIENT ASSESSMENT



Prepared for:

**Jose**

07/24/2015

# PERSONAL INFORMATION

FranNet Consultant: Claudia Lardizabal

Date Submitted: 07/24/2015

Jose	Home Phone:	Best place to call:	Cell
	Cell Phone:	Marital Status:	Single
	Email:	Number of children/dependants:	2
	Sex: Male	US or Canadian Citizen:	Yes
	Date of Birth: 11/13/1977	Are you a veteran:	No
	Own/Rent: Own		
	How long: 7 (yr/s)		

Spouse Name:

Spouse Occupation:

Education:

Masters Degree

Most recent business or employment:

Company Name:

Donna ISD

Position held:

Teacher

Most recent annual income:

\$ 50,000

Have you ever owned your own business?

Yes

How long have you been looking for a business?

1 year

What business(es) have you looked at?

oil change/car wash service, gym, crossfit gym,

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

previous experience and these are areas that interest me

How will you know when you have found the right business?

I will not hesitate to move forward

How much time can you devote to working in your business?

50 plus hours

Greatest business achievement?

high ranking in net profit and other sales categories when working as store manager for auto zone.

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

Flexible schedule, exciting business model. profitable, help from the franchise with the flexibility to make changes if i feel they will help the business.

Area(s) Preferred(City/State/Province)

Mcallen

Texas

Hidalgo

Professional affiliations and hobbies?

Investing in stocks, mutual funds etc, working out, boxing, crossfit.

How did you learn about FranNet?

SBA email

Upload your resume:  Yes

# BUSINESS CHARACTERISTICS

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

Any situation in which i am challenged with new tasks and multiple tasks in hand. I am not aware of a situation in which i have been the happiest but I feel at my best when I am challenged and under pressure

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

As a teacher coming from a business background I felt unable to make changes that I felt needed to be made. I saw many mistakes that the administration made and I was not at authority to make any changes or suggestions.

Things you want to avoid when considering a business?

Business types that are in abundance, I want something unique not a business that you see in every corner unless its a gym that would be the only exception.

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? 8

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

Based on experiences your strengths are:

multitask, disciplined without being stressed out no matter how much pressure I am under. I am able to delegate and give my employees power so that they may grow and succeed. I am always looking for ways to change and improve.

Your weaknesses are:

Sometimes I try to handle too much at one time. Sometimes when tasks are successful i tend to keep things as is instead of trying to improve and continue the success.

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 community creating awareness for my business. Attending several networking events on a monthly basis such as the chamber of commerce, trade shows, industry organization events where potential customers and strategic referral partners network. 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 that draws customers to me. Once a potential customer has called me or walked into my store, I am comfortable interacting with him/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: No

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	Important
Recognized franchise brand	Somewhat
Potential for significant growth	Important
Professional or trade preferred	No Preference
Interested in (check all that apply)	Automotive,Service,Retail,B2B
Business location is based at	A facility
Business environment	Important
Customer type desired	Repeat
Employee type desired	Hourly
Number of employees	10+
Product versus service	Both/either
Your cash investment level	\$25-\$49k
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
Your need for personal income	6-12 mos

# FINANCIAL INFORMATION

## Assets

Cash in checking account	\$ 2,000
Cash in savings account	\$ 3,000
Stocks and Bonds	\$ 7,000
IRA	\$ 0
401k's / RRSP's	\$ 0
Real Estate Value (Home)	\$ 0
Real Estate Value (Other)	\$ 0
Automobiles	\$ 15,500
Other vehicles	\$ 4,000
Your own business	\$ 80,000
Appraised Collectibles	\$ 0
Money due you	\$ 0
Other assets	\$ 10,000

**Total Assets** **\$ 121,500**

## Liabilities

Notes payable to banks	\$ 0
Notes payable to finance companies	\$ 0
Charge Accounts	\$ 30,000
Credit Cards	\$ 22,000
Taxes Payable	\$ 0
Mortgage,Residence	\$ 0
Mortgage,other	\$ 0
Due on Automobiles	\$ 16,000
Due on other vehicles	\$ 0
Other Liabilities:	

**Total Liabilities** **\$ 68,000**

Net Worth: \$ 53,500

Liquid Capital: \$ 40,000

Amount to Finance: \$ 210,000

Total Investment: \$ 250,000

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: \_\_\_\_\_



**Values / Motives**

Belonger      Achiever      Societal      **Emulator**

**Compliance**

Low      **Average**      High      Very High

**Stage of Growth**

Intropreneurial      **Balance**      **Managerial Growth**      Acceleration      Enterprise

**Core Competencies**

Administration & Management      Sales & Promotion      **Marketing & Advertising**      **Technical & Product Knowledge**      Client Management & Support

**Work Style**

**Director**      Promoter      Collaborator      Thinker

**Focus Preference**

**Aware**      Focused      Strategic      Systematic

**Leadership Style**

**Autocratic**      Paternalistic      Democratic      Laissez-faire

**Sales Potential**

Low      Average      Above Average      High      **Very High**

**Business Development**

Contractor      Entrepreneur      Single Unit      Multi-Unit      Area Developer

**Sales Orientation**

**Consultative**      Relational      **Competitive**

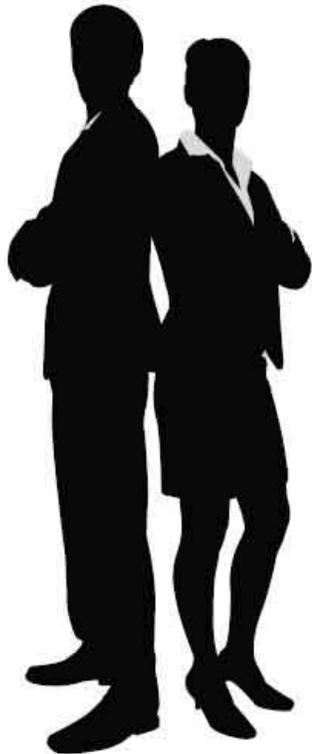


*Motives are the only true predictors of behavior and performance. The **BASE Assessment** measures Buyer Motives and Value Sets which determine what about the self is the meaningful core that governs desires and the expression of those desires in life and business.*

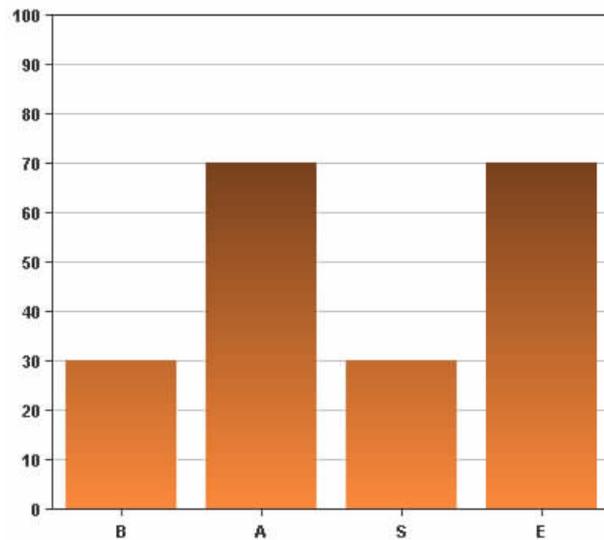
Jose is trendy, fun loving and competitive. People in this group are motivated by achievement and concerned about the opinions and approval of others. Money defines success for Emulator-Achievers, who have an insatiable drive to meet their desires. Confident, competent and assertive they are driven to perform in any challenging or competitive environment. They favor stylish, cutting-edge and prestigious concepts.

Emulator-Achievers are image, recognition, and money oriented, and well-suited to sell high ticket items. They are independent thinkers, quick to decision and enjoy taking great risks. The Emulator-Achiever demands a high degree of autonomy and control. Emulator-Achievers will question old ideas, authority and systems while looking for innovative methods to grow their businesses. As charismatic leaders they stimulate productivity within others.

Flexible business formats and concepts with limited employees and customers to manage will prove a good fit. An opportunity which allows aggressive growth and potential for multi-units will no doubt attract them. The Emulator-Achiever would do well to consider businesses still dynamic and evolving so as to edge out competition, quickly gain market share while having a say in policy.



## Emulator-Achiever

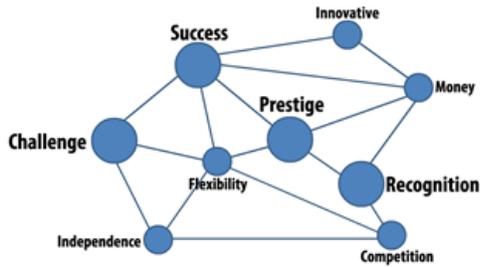




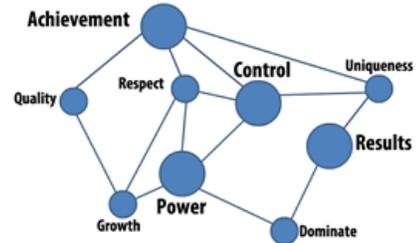
## Values

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

### EMULATOR

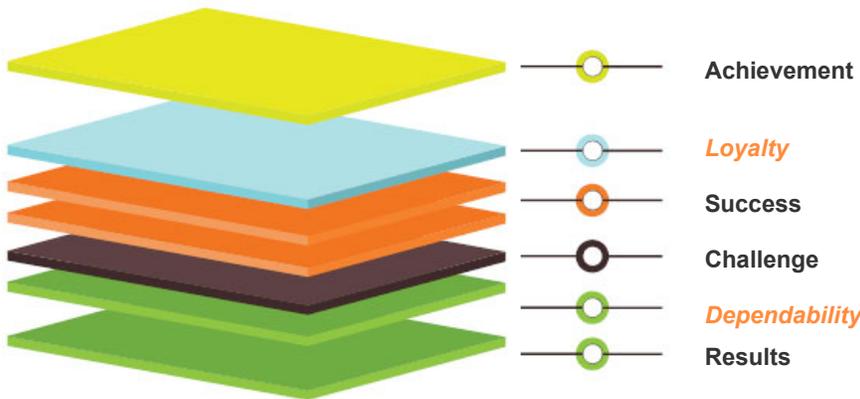


### ACHIEVER



## Hierarchy of Values

Based on assessment results here are Jose's values:



Values italicized in orange (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.



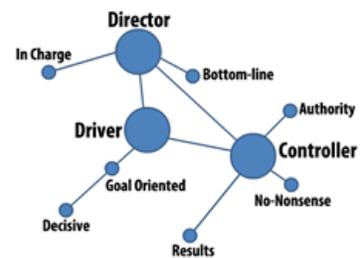
## Work Style

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

**Work Style: Director** Scores indicate Jose 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.



## Director





## Work Styles at a Glance

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





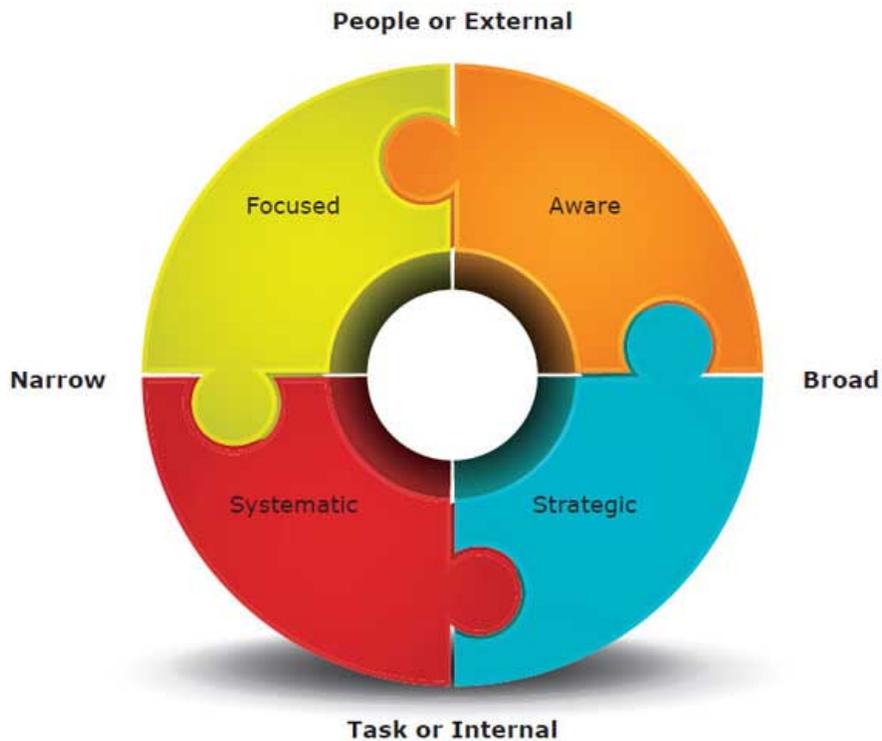
## Focus Preference

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: Aware

This kind of concentration is used for awareness and sensitivity to people and surroundings. Jose is:

- Aware and sensitive to others, including customers
- Can assess opportunities or challenges quickly
- Conceptual thinker; focused on long-term goals
- Willing to take risks and try something new
- Outgoing, energetic and well liked





## Leadership Style

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

### Leadership Style: Autocratic

- Manager makes all the decisions and rules.
- Keeps the information and decision making among the senior management.
- Objectives, tasks and rules are set and others are expected to do as required.
- Can lead to a decrease in motivation from the employee's point of view.
- The communication involved with this method is mainly downward.

**Advantage:** the direction of the business will remain constant, and the rules and decisions will all be similar, this in turn can project an image of a confident, well managed business.

**Disadvantage:** subordinates may become dependent upon the leaders and supervision may be needed.

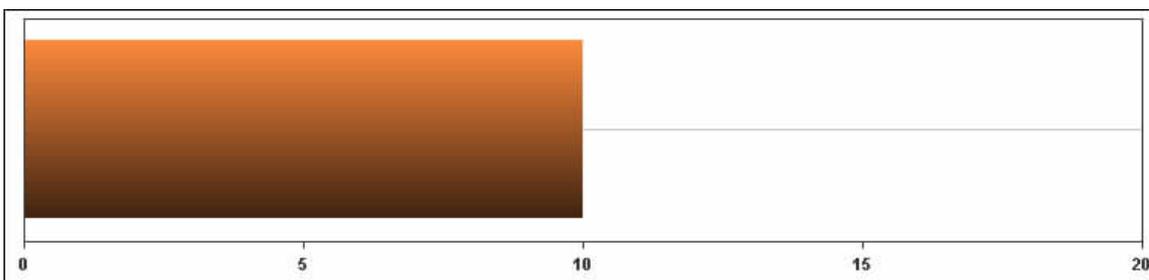
There are two types of autocratic leaders or rule makers:

- **Directive Autocrat:** Makes decisions unilaterally; closely supervises subordinates.
- **Permissive Autocrat:** Makes decisions unilaterally; gives subordinates latitude in carrying out their work.

## 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: AVERAGE



Scores indicate Jose has a **AVERAGE** compliance for Systems, Rules, Standards and Financials.



## 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: Marketing and Advertising

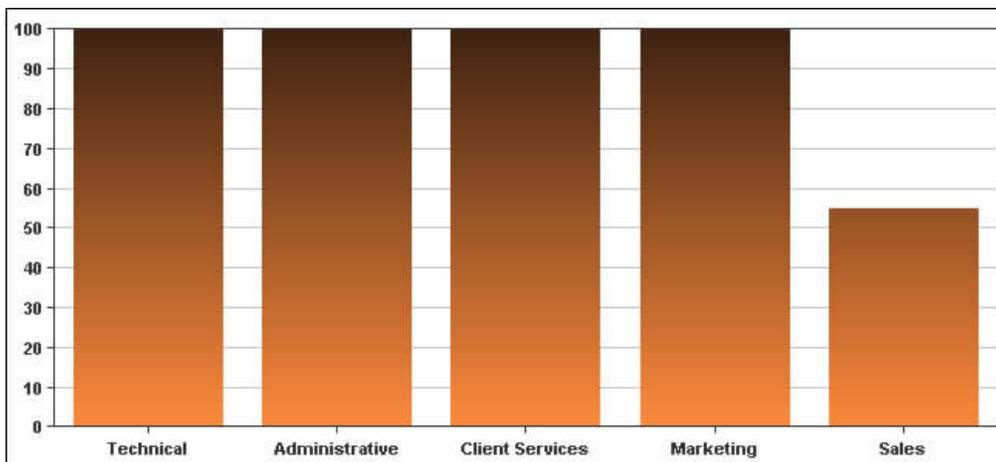
Jose has strong marketing and advertising skills. People with these skills have their finger on the pulse of the market and adjust their business strategy accordingly. They are excellent at managing all functions that anticipate and satisfy a customer demand while keeping an eye on profitability.

Some of these functions include key account management, contract negotiation, budgeting, research, innovation, business development and staff development. They understand the value of attracting, selling and retaining customers.

### Secondary: Technical and Product Knowledge

Jose has strong technical and product knowledge skills. It seems that no matter what business, product or environment, people with these skills master the skills and knowledge needed to succeed. They learn quickly, perform and become an expert in specific tasks and processes.

They have the operational capabilities to run a business. They develop skills, strategies and tactics to be proficient at those functions necessary to execute a deliverable and grow a business. They tend to lead by example and have high expectations of themselves.



## 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: Toward

Scores indicate Jose is an individual focused on goals. People in this group are motivated to have, get, achieve and attain. Sometimes due to their natural optimistic and move forward attitude they may have trouble recognizing what should be avoided or identifying potential obstacles or problems. They tend to be good at managing priorities.

### Frame of Reference: Internal

Jose is an Internal. These people have their own internal standards and make their own judgments about the quality of their work. They have difficulty accepting other people's opinions and outside direction, even if they are good ideas. They may gather information from outside sources; however they will assess it based on their own internal standards. Since they do not need feedback on how well they are doing, as managers they tend not to give feedback to others.

### Task Attitude: Procedural

Jose 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 Jose 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



### Needs and Wants in Business

- Flexibility to accommodate their innovations
- Recognition, rewards and instant gratification
- Potential for growth and income
- System with little back office involvement
- Upcoming trends
- Products or services that are progressive
- Ability to compete

### Businesses Best Suited

- Cutting edge technology
- Anything trendy and futuristic
- Highly visible and prestigious
- Dynamic and changing
- Potential for quick return on investment
- Sales - even high ticket
- Business-to-business
- Cost no objection in their opinion
- Management business
- White collar

