# Office Owner Pre-training

# checklist for New Associates

### General

\_\_\_\_\_\_\_ Negotiate terms of Associate Agreement. Check with local employment Attorney to make sure terms do not violate Independent Contractor status.

\_\_\_\_\_\_\_ Items to be decided:

* Where will Associate work on a daily basis? Home or Office?
	+ If office space – who pays? Office Owner or Associate?
* What expenses will be covered by Office Owner and what expenses will Associate cover?
	+ Lead Fees
	+ Marketing Materials
	+ Business Cards
	+ Training Expenses
	+ Seminar Costs (Room Rentals)
* How will the lead sources be divided?
	+ What sources will be assigned to the Associate and what will be retained by the Office Owner?
		- Outplacement
		- Internet Leads
		- SCORE
		- SBDC
		- SBA
		- ExecuNet
		- National Webinar leads
		- Libraries
		- TAP
		- Other Military sources
		- Chamber of Commerce
		- Others
* Determine Social Media Strategy
	+ How will you present to the public?
		- Consultant Page
		- LinkedIn
		- Facebook
		- Twitter

\_\_\_\_\_\_\_ Go to FRED and review the “Adding a New Team Member” course. Submit form.

\_\_\_\_\_\_\_ Work with Associate and HQ trainer to be sure all Pre-Training work is done prior to scheduled attendance at class.

### Legal & Administrative

**\_\_\_\_\_** Associate agreement signed and Submitted to HQ.

**\_\_\_\_\_** Salesperson Disclosure Form Signed & Submitted to HQ.

**\_\_\_\_\_** E & O Insurance Premium Paid

**\_\_\_\_\_** Bio & Professional Photograph (with white background) submitted to HQ.

**\_\_\_\_\_** Office Address (physical address) & Phone Established

**\_\_\_\_\_** Training Fee Paid to FranNet LLC.

### Computer & Other Equipment Requirements

**\_\_\_\_\_** Purchased Laptop

**\_\_\_\_\_** Purchased & Installed Anti-Virus Software

**\_\_\_\_\_** Email Account Established with HQ

**\_\_\_\_\_** Purchased or have access to LCD Projector

**\_\_\_\_\_** Purchased or have access to Fax

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### Inventory Review

**\_\_\_\_\_** Review list of Local Market FranNet Featured Franchisors

**\_\_\_\_\_** Reviewed FranNet Featured Franchisors 2-Minute Drills on Zor Portal

**\_\_\_\_\_** Reviewed Audio Presentations from FranNet Featured Franchisors.

**\_\_\_\_\_** Identified other FranNet Featured Franchisors availability in your area.

### PFA Review

**\_\_\_\_\_** Reviewed PFA (Personal Franchise Assessment) training on FRED.

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### Learning the Seminar

**\_\_\_\_\_** Reviewed Seminar Videos on FRED.

**\_\_\_\_\_** Downloaded FranNet Seminar PowerPoint Presentations.

### Research

**\_\_\_\_\_** Compile list of all Outplacement Firms, career centers and key contact information for those firms that Associate will be assigned.

**\_\_\_\_\_** Compile location and contact information for SBA, SBDC and SCORE offices in your market that will be assigned to Associate.

### Marketing Materials:

**\_\_\_\_\_** Read brand standards manual.

**\_\_\_\_\_** Order FranNet Business cards, stationary, envelops and any other supplies that may be needed: name badge, pens, shirts, etc.

**\_\_\_\_\_** Order Road Maps for Success Booklets.

**\_\_\_\_\_** Review Marketing Section on frannet.net to download materials, logos, flyers and important handouts.

**\_\_\_\_\_** Submit bio, all contact info, territory name, and picture to have your micro site created.

**\_\_\_\_\_** Prepare Intro kits to use with the lists you complied for outplacements, SCORE, SBDC and all key contacts in your market.

### Specifics for Website 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.

###  FranNet Associate Computer Standards:

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| --- | --- |
| **System Requirements** | - 2 GB available hard disk space (4 GB if product is downloaded) - DVD drive - SVGA (800x600) or higher resolution monitor, recommended resolution is 1024x768- 1 GB system memory - Windows Installer Service 4.5 .NET 3.5 Service Pack 1**Processor speed for Windows**® **XP** - 1.0 GHz Pentium® IV processor (or equivalent) **Processor speed for Windows Vista**®- 1.8 GHz Pentium IV processor (or equivalent) **Processor speed for Windows 7**- 1.8 GHz Pentium IV processor (or equivalent) |
| **ACT Works With**  | - Microsoft Office 2003, 2007, and 2010 (32-bit version only) (SP3 recommended for Office 2003 and SP2 recommended for Office 2007)- Microsoft Outlook Express 6.0 SP21- Lotus Notes® 6.5, 7.0.2, and 8.0- Eudora® 5.2- Internet Mail SMTP/POP3- Microsoft Internet Explorer® 7.02 and 8.0- Adobe® Reader® 6.0 and 7.0- VMware® Workstation 5.x and 6.x; VMware Fusion, VMware Server 1.x, 2.x- Citrix® software using Citrix Presentation Server™ 3.0, 4.0, or 4.5- Parallels Desktop for Macintosh® 4.0; and Parallels Workstation 2.2 for Windows - Sun Virtual Box 2.x  |
| Operating System Compatibility Matrix |
| **Client**  | - Windows® XP SP33 (32-bit only)- Windows Server® 2003 SP2 (32-bit and 64-bit)- Windows Vista®4 SP1 (32-bit and 64-bit)- Windows Server 20085 SP2 (32-bit and 64-bit)- Windows 7 (32-bit and 64-bit)  |

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| 1. Outlook Express is available on Windows XP and Windows Server 2003.2. On 64-bit versions of Windows, Internet Explorer (32-bit) is recommended.3. Windows XP Professional limits the number of concurrent network connections to 10 (Home Edition limits concurrent connections to 5).4. Windows Vista limits the number of concurrent network connections to 10 (Home Basic and Home Premium Editions limit concurrent connections to 5).5. "Core Server Installation" of Windows Server 2008 is not supported. |