



Consultation and Matchmaking Process

Developed to help you understand the process and benefits of utilizing the services of a professional franchise consultant.

Presented By

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Client Benefits

Why Use a Franchise Consultant

If you are taking the time to review this document, there is a strong likelihood that you can benefit from the services of a professional franchise consultant. First and foremost, you know what you don't know and place value on getting the help you need to make an informed business decision. Here are some common reasons why people utilize my services:

- **Impact of Decision** - For most people, selecting a business is one of the biggest decisions one can make and this one decision will have long-term consequences on their lives.
- **Lack of Knowledge** - Most people have heard about franchising, but many don't know the details. Franchise consultants educate you on all aspects of franchising and are available to lend their perspectives as questions arise.
- **Mitigation of Risk** - Franchise consultants provide you the knowledge and support through the franchise buying process, helping you assess and calculate potential risks.
- **Time** - The franchise investigation and evaluation process can be very time consuming. Franchise consultants help reduce the time wasted on franchise concepts that are not a good fit for you.
- **Uncertainty** - Many people looking for a business may not know whether now is the right time, if they have sufficient capital, or what franchises would be a good fit. We help bring clarity to those questions and concerns through education and collaboration.

Franchising is Not for Everyone

Going into business, whether it's your first rodeo or you've owned businesses in the past, is not an easy task. Most people have a plethora of questions and concerns - and rightfully so. We help people understand what franchising is all about and what it's going to take to be successful based on their personal, lifestyle, and financial goals. We are also prepared to let you know if franchising may not be for you, if you do not to have the required skills, ability, personality or capital needed to succeed.

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Process Overview

An Easier Way

The process we use for helping clients investigate franchising has been used to help thousands of people research and select franchises that are best suited to help them achieve their lifestyle and financial goals. Coupled with the experience of your franchise consultant, your franchise education process will be effective in helping you make a more informed business decision that is best for you. Whether that means you move forward with a franchise or not.

Process Overview

The purpose of this document is to serve as a resource as you make a decision to utilize the assistance of a franchise consultant. It's vital that you understand our process and more importantly why the process can help you succeed in finding that perfect fit franchise.

Here's a brief overview of the process:

- STEP 1** Initial DEEP DIVE discussion about YOU
(45 minute Zoom or Call)
- STEP 2** Franchise Industry TARGETING EXERCISE
(60 minute Zoom)
- STEP 4** Franchise OPTIONS REVIEW
(60 minute Zoom)
- STEP 5** Franchisor INVESTIGATIONS
(8 to 20 weeks, at your own pace)

Time Commitment

If you are serious about researching franchising, then understand that there is a significant time requirement required. The initial phase with your consultant (first four steps above) does NOT take very much time, the real time commitment is when you begin interacting with franchisors. Each franchise company has a specific process that is required of franchise candidates that wish to be awarded a franchise. Just know that you can stop the process at any time for any reason, ultimately you control the process.

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Learning About You



Goals of Our Initial ZOOM Call

Our initial DEEP DIVE call is a vital step in the process, allowing us to set your criteria for goals, expectations, business attributes, level of involvement and bring clarity to the process. My ultimate goal is to educate you about franchise buying and help you find that “perfect fit” franchise.

Here is what we’ll accomplish during our initial call:

- **Understand You** - This is one of the most important things I can do. My ability to successfully match you with franchise opportunities that could be that “perfect fit” will require me to understand who you are, your skills and abilities, goals and so much more. During this initial step in my process, I ask all the right questions and make sure I get the information I need to make the most of this process.
- **Develop Rapport & Trust** - This is essential in our working together successfully and you’ll find me to be extremely open and honest. I understand how important of a decision buying into a franchise is and how such a decision has long-term consequences. My job is to be that trusted and objective advisor that helps you understand the franchise buying process and identify those franchise options that I believe to be best suited to you.
- **Legal & Financial Discussion** - It’s important to understand the legal and financial resources used in the franchise buying process. I make sure you understand what resources you may need and when it is appropriate to reach out to industry experts.

No Pressure - No Selling

I serve my clients as a franchise consultant and matchmaker, I do NOT sell franchises and do NOT pressure clients into buying a franchise. I help educate you about franchising and the franchise buying process. My process is extremely effective in helping people identify those franchise options that may be best suited to help them achieve their lifestyle and financial goals.

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Industry Targeting



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Common Misconceptions

I have found that when I bring up a specific industry category (i.e. food, fitness, automotive, retail, property services, technology, etc.), most people have developed some preconceived notions about industry categories based on experiences they have had. They also tend to believe that they should look into specific industries that they are most familiar with and those are often industries that have been employed a good portion of their lives.

Franchise “TYPES”

There are four primary “types” of franchises, comprised of two retail types and two service types. I refer to those four types as four “buckets” and through this process we will determine what type(s) of franchises are the best fit for you.

The four types of franchises are:

- Simple Retail Franchises
- Sophisticated Retail Franchises
- Business-to-Consumer Service Franchises
- Business-to-Business Service Franchises

Franchise Industry Targeting Exercise

Most people do a good deal of their franchise investigations online, but with over 3,500 franchises in the U.S. it is often impossible for most to understand what’s out there and what could be the best fit. If you’ve done some online research, you’ve probably been on industry websites with listings of hundreds of franchises and how franchises are broken down into categories or industries.

What I have found to be extremely effective is to walk my clients through the various industry categories of franchising and gain your feedback (preferences). Quite simply, I share investment levels, attributes, and insights of a franchise industry and ask you to rate that industry 1-10. You’ll take your knowledge and past experiences with that industry and what I have shared to come up with your rating that represents your level of interest.

This exercise, along with what I’ve learned about you in our initial call gives me what I need to start my investigations. Not only do I know who you are and what your looking to accomplish, I understand your preferences.

My goal is simple, to bring you the most relevant options possible.

Franchise Options Review



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Determining Franchise Options

Leveraging my 30+ years of franchise and business experience, and first hand knowledge of hundreds of franchise brands, I research franchise options in those industry segments that you have the most interest in. My research includes a comprehensive analysis of the franchise attributes against your specific criteria. I then conduct my market research to insure that there is territory availability and it makes sense for your preferred market(s).

Franchise Options Review

Typically one week after the Franchise Targeting Exercise, I will have completed my research and will be prepared to share the results with you.

Here's what you can expect from our Franchise Options Review:

- **Specific Brand Review** - We will discuss in detail 6 to 8 franchise opportunities that I believe are best suited for you. We will take a deep dive into the details of the brand, organization and why I believe it is a worthwhile choice.
- **Franchise Selection** - At the end of our call I will ask you which brands you have the most interest in and if you would like me to connect you to one or more so you can begin your discussions with the franchise companies. You are not obligated to select a franchise or begin discussions, however, most people are typically excited to learn more about the franchises that peaked their interest.
- **Discussions with Franchisors** - Based on your selections, I will reach out to only the franchisors you selected, provide them with your information and have them reach out to you to schedule an initial discussion.

100% Your Choice

It's so important that you understand that your selection of which franchise(s) you decide to investigate will be 100% your choice with no pressure from me. I don't tell my clients what they should do, I merely do my best as a experienced franchise matchmaker and present you with options that I believe to make the most sense. Where you take your franchise investigations from here is your choice (obviously).

Franchisor Discussions

Franchise Investigations

Upon your selection of franchises you would like to investigate, I connect you at a high level with those franchisors. Franchisors that work with me put a great deal of value on my services and know that the candidates that I recommend to them have been pre-vetted and meet their requirements.

Once I have submitted your information, you can expect to hear from the franchisor to schedule your initial discussion. During that initial call, they will typically provide you with an overview and make sure you understand their franchise development process. Typically, these processes have 7-9 steps and are designed to leave no stone unturned. The goal of the process is for you to be able to make an informed decision about the franchise and for the franchise company to determine if you are a good fit for their organization.

Time Requirements

Franchisors have a process for candidates to learn about all aspects of their business model, organization, and franchisee requirements. There is typically a time commitment of 1-2 hours per week, per franchise, expanding as you get deeper into the process and start spending time speaking with franchisees. If you are serious about an opportunity, it is likely that you be asked to participate in what is referred to as a Discovery Day, where you'll spend a day or so at the corporate headquarters meeting with franchise executives, touring operating businesses, and experiencing the brand first hand.

Ongoing Consultant Collaboration

Invariably, you will have questions after you speak with franchisors. I welcome my clients to leverage my franchise and business experience to help guide them through the process. I also have a number of legal and financial resources available if you decide to invest in a franchise.

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Questions & Answers

What does it cost for the service?

My services are 100% FREE to you - no gimmicks? Just as in real estate, the buyer (you) does not pay the agent commission. The seller (franchisor) pays a commission, but only if you execute a franchise agreement and become a franchisee.

Why wouldn't you recommend franchises that pay the most commission?

The commission structure is very similar across the board and there's really no incentive to pick one brand or another for that reason. I would rather find you a great business that you could succeed with and then hopefully you refer friends and family to me.

Do I have to buy a franchise?

You are NOT obligated to buy a franchise. We are merely investigating franchising and focusing on those franchise options that are best suited for you based on the criteria we develop together.

What if I want to quit my investigations?

There is no contract between us and you can quit your investigations whenever you want. Sometimes there are things that happen in life that make us shift directions. I only ask that you notify me and the franchisors that you are in communication with as soon as you decide to end your investigation.

Can I also investigate franchises on my own?

The simple answer is yes, however, it's often best to keep me informed of what franchises you have come across that you have interest in. It is likely that I have insight into the industry segment or the franchise that I would be happy to share with you.

What if I don't like your options?

Then we discuss what you don't like and bring you additional options for consideration. This is a learning process and in some cases we don't hit the bullseye in the first round of investigations. No worries, it's not all that uncommon to have to revisit the franchise selection process as we continue to learn.

Can I buy any franchise I want?

Franchises can not be purchased, they are awarded by the franchisor. The franchisor has the right to refuse to award a franchise to candidates that do not meet their qualifications or if they don't think you're a good fit. That's why it's a good idea to present yourself in the best light possible and provide the utmost of professionalism when working with franchisors through their development process.

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