



SEPTEMBER 25-27, 2017
THE WESTIN HOTEL
PHILADELPHIA, PA
FRANCHISESPRINGBOARD.COM

SPRINGBOARD

A SPECIAL EVENT FOR EMERGING FRANCHISORS

Monday September 25th

Agenda

EMERGING FRANCHISOR
PROGRAMMING

9:00-3:00 Fran-Guard™ (IFA 300 CFE Credits)

3:00-5:15 Clinics

Our clinics are intended to help you hit the ground running by providing a baseline of knowledge for the duration of the program. Our clinics are intended to help you hit the ground running by providing a baseline of knowledge for the duration of the program. The material is divided into the six core competencies below, which lay the groundwork for the rest of conference.



Finance

The finance portion of the clinic will examine the ways franchisors manage their balance sheet and income statement in order to grow within their infrastructure while measuring success and failure. We will cover: new FASB rules; balance sheet issues; state examiners; benefits and detriments of equity and debt; pitfalls of guaranteeing leases and loans for franchisees; when to raise money and how to decide which vehicle to use; and income statement issues. We will also touch on valuing emerging franchisor entities.

Moderator: Ron Feldman – CDO, ApplePie Capital

Panelists: Mike Zyborowicz – Partner, Citrin Cooperman & Company, LLP; Geoff Seiber – President & CEO, Franfund; Steve Siegel – CEO, Brookside Consulting; William St. Clair – Managing Shareholder, St. Clair CPAs, P.C; Todd Recknagel – Managing Partner, Three20 Capital Group, LLC



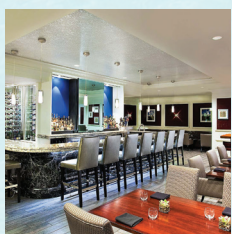
Lead Generation & Franchise Sales

The lead generation portion of the clinic will discuss current trends and best practices for franchisee lead generation and will cover: formulating a lead generation budget and media plan; understanding the basic metrics (including leads per month, time on site, cost per lead); using non-paid media sources (including referral programs, networking opportunities and customers); using multiple media sources (including internet, brokers, PR); franchise advertising in trade media, tradeshow exhibiting and franchise websites; and using social media and content to generate buzz and leads.

The franchise sales portion of the clinic will focus on overcoming objections to close the deal and will cover: best practices for conversion programs (acquiring visitors, turning visitors to leads, turning leads into candidates, and turning candidates into franchisees); Discovery Days; validation calls; using the FDD as a sales tool; what you can and can't say to prospects; and crafting a legal and compelling Item 19.

Moderators: Candace Couture – VP of Franchise Sales, Planet Fitness; Tom Wood – President & CEO, Floor Coverings International

Panelists: Jack Armstrong – President & Owner, FranNet of NJ & NYC; Tom Portesy – President & CEO, MFV Expositions; Scott Mortier – President, The Franchise Whales, LLC; Gary Huether – President & Co-founder, Arooga's Grille House & Sports Bar



Legal Clinic

The legal clinic will discuss current trends and best practices related to: positioning your franchise offer in the best possible light; implementing the new FPR Rules; addressing the new FASB accounting standards; making sure your agreements say what you need them to say; managing risk; implementing system change; methods to work out your poorly performing franchisees; and legal issues related to cross-border franchising.

Moderator: David Allsman – Partner, Fisher Zucker, LLC

Panelists: Frank Robinson – Partner, Cassels Brock, LLP; Peter Viitre – Partner, Sotos, LLP; Sean Falk – President, WolfTeaM LLC; Neal Courtney – CEO, Cookie Cutters Haircuts for Kids; Red Boswell – Chief Growth Officer, Expense Reduction Analysts

4:15-5:15 Operations, Digital Marketing & Technology Clinics

Operations

The operations portion of the clinic provides emerging brands with advice on the best practices in organizing functions and people in operations and will cover: compliance and transparency as part of corporate culture; honest and effective communication; when to add staff and how to measure their performance; customer reviews, ratings and loyalty programs; franchisee inclusion in decision making; growing your supply chain and distribution footprint; hiring and retention (who to hire and when); franchisee training; contents of manuals; and national accounts.

Moderator: Roger Falloon – COO, Chickie's and Pete's

Panelists: Dave Wood – CEO, Firenza Pizza; Marty Ferrill – President, Philly Pretzel Factory; Paul Altero – CEO & Co-owner, Bubbakoo's Burritos; Dave McDougall – CEO, Back Yard Burgers; Brian Garrison- COO, Buzz Franchise Brands

Digital Marketing Clinic

In today's tech-savvy world, it's important to make sure your brand doesn't get stuck in the past. Find the answers to looming questions emerging brands like you need to know to get set on the right course to successfully navigate the intricate digital marketing world. Hear the inside scoop of what works and what doesn't from seasoned franchisor marketing and franchise development executives, along with a guided tour of the digital marketing services world. Together, you'll learn what's "trending," and, more importantly, what's moving the needle for emerging franchisors.

Moderator: Sherri Fishman – President, Fishman PR

Panelists: Justin Mink – SVP of Sales, Scorpion; David Lewis – Vice President of Franchising, Express Franchise Development; Michael McKerlie - COO, Manalto, Inc; Jacob Chappell – VP of Enterprise, SOCi; Kevin King – Chief Development Officer, Smoothie King; Audrey Gilfor – Programmatic Media Manager, LevLane; Derik Beck – VP of Digital Marketing, Cottman Transmission and Total Auto Care

Technology Clinic

Whether transitioning your seasoned brand out of the analog and into the digital, or just getting started franchising your concept, learn what works and what doesn't when it comes to incorporating technology. Founders and suppliers alike will offer insight on what tools have garnered them the most success in the tech realm.

Moderator: John Teza – Director, NRD Capital

Panelists: Keith Gerson – President & Chief Client Advocate, FranConnect; Stan Friedman – President, FRM Solutions; Marcia Mead – Head of Franchise Relations, Naranga; Chris Myers – CEO & Co-Founder Bodetree; Ari Katz – VP Franchise Sales, Main Street Hub

6:30-8:30 Welcome Reception at Marathon Grill on 19th and Market

Tuesday September 26th

7:30-8:30 Breakfast

8:30-9:15 Welcome & Opening General Session with remarks from Shelly Sun, Ryan Shea and John Teza, Event Chair

9:15-10:15 Keynote Address by Arby's Founder Leroy Raffel with Q&A

10:15-10:30 Break

10:30-11:30 Breakout Sessions #1



1. Franchise and Marketing Programs to Help the Bottom Line

As an emerging franchisor, your goal is to add franchisees and to strategically scale-up and grow your franchise system. During this session, we will be covering the benefits of implementing different franchise programs and marketing services into your business model. We will discuss cost advantages, ease of implementation and how to ensure success of your overall system.

Moderator: Brad Fishman – CEO, Fishman PR

Panelists: Gary Goerke – President, Franchise Phones by Clarity; Tom Epstein – CEO, Franchise Payments Network; Becky Woodington - Marketing Strategist, Direct2You; Gretchen Kaufman – Director of Enterprise Sales, Xpressdocs; Sam Ballas – President & CEO, East Coast Wings & Grill

2. Emerging Franchisor Technology/Solutions: Building the Right Technology Culture into the DNA early

Digital technologies are re-shaping the franchise industry across all sectors. Today's consumer expects to interact through digital technology platforms that span the entire brand experience. With competing priorities, limited budgets, and the rapid pace of innovation, building a strategic approach to technology into the DNA of an emerging concept has never been more important. But ask ten franchise executives where to start...and you will likely get ten different answers. Our panelists, executives from franchise organizations and technology solution providers, will help the emerging franchisors in attendance begin to build a basic framework for leveraging technology across their organizations.

Moderator: John Teza – Director, NRD Capital

Panelists: Jeff Dudan – CEO & Founder, AdvantaClean; Adam Heitzman – Managing Partner, HigherVisibility; Brian Garrison – COO, Buzz Franchise Brands; Catherine Deano – Owner, Painting with a Twist

3. Using Your FDD as a Sales Tool/Item 19

Most franchisors do not take the time to review the substance of the disclosure document and franchise agreement with a prospect, leaving the prospect to get his first explanation from his own counsel. This problem is compounded by the fact that many franchise prospects use lawyers without any franchise experience who are incapable of understanding that more onerous contractual protections are needed in order to protect the "system." Therefore, it is critically important to review the disclosure document and franchise agreement with a prospect, and explain any unusual disclosure or any seemingly onerous contractual provisions. This session will explore ways to leverage your otherwise "dry" legal documents to drive franchise sales by alleviating a prospect's fears and describing a compelling business opportunity within the law.



Moderator: Gary Findley – CEO, Restoration 1

Panelists: William Graefe – Partner, Fisher Zucker, LLC; Kris Nieb – President, Velocity; Michael Landry – VP of Franchise Development, Rent-A-Center; Chris Simnick – Representative, FranchiseTeacher.com; Steve Beagelman – CEO, SMB Franchise Advisors

4. Money Matters: Experts Share the Financing Secret Sauce

Growing the brand is the goal of any successful franchise system. Panelists will identify and discuss key factors such as: SBA decisions; financing partners; Item 19; financials; easing capital access and much more.

Moderator: Sharon Dietrich – Capital Access Advisor, FRANdata

Panelists: Allison Zorich – National Business Development Manager, Guidant Financial; Dallas Kerley – President, Benetrends Financial; Sandy Shoemaker – Partner, EKS&H; Rafael Alvarez – CEO and President, ATAX; Don Tyson – Sr. Credit Officer, The Bancorp Bank

5. Onboarding New Franchisees

For franchisors, getting a new franchisee up to speed quickly has many benefits. This panel of seasoned franchise veterans will share their onboarding strategies designed to accelerate openings and improve engagement. Attendees will walk away having learned real-life examples and best practices for getting new locations up, running and successful. Topics will include: financing's impact on the on-boarding process; financing single and multi-units; real estate; how to plan your top 10 growth markets; having accurate and up-to-date Ops Manuals to train independent and knowledgeable zees; company culture, mission and brand position; managing expectations and compliance; and accounting for the business, not only the franchise.

Moderator: Cordell Riley – President, Tortal Training

Panelists: Gary Occhiogrosso – Founder & Managing Partner, Franchise Growth Solutions; Bill Bunting – President, Total Franchise OPS & Pop's Italian Beef; Lonnie Helgerson – Chairman, Kix Mobile; Marla Topliff – President, Rosati's Pizza; Troy Schwehr – National Account Executive, F.C. Dadson

11:45-12:45

Breakout Sessions #2

1. How to Define & Differentiate Your Brand in a Crowded Industry

Candidates are inundated with options when they start considering a franchise opportunity. During this session, we will discuss ways smaller brands can differentiate themselves from other systems in crowded franchise sectors. In addition, we'll talk about how to identify the services and support you need to put in place early on, and how to set expectations for both candidates and franchisees in order to effectively scale growth and be a best-in-class franchise system.

Moderator: Michelle Rowan – President & COO, Franchise Business Review

Panelists: Lenny Verkhoglaz – CEO, Executive Care; Jon Waxman – VP & Director of Operations, Lee's Hoagie House Franchise Group, LLC; Brian Gross – President, Bach to Rock; Tom Wells – Vice President, BIP Capital

2. Growth in a Franchise System: Maximizing Unit Level Economics

Knowing the key areas to maximize unit level economics for your business and franchisees is critical to growth. In this session, we will be discussing five areas to ensure better results: (1) having the right systems in place; (2) having the right language within your FDD and agreements; (3) having benchmarking and key performance indicators; (4) having performance groups; and (5) having a culture to set the direction. Our panelists will share their own experiences and thoughts to help you determine the best methods and strategies for your brand.

Moderator: Sam Ballas – President & CEO, East Coast Wings & Grill

Panelists: Diamantis Dean Hatzitheodosiou – Senior Director of Business Development, FranchiseBlast; Steve Murphy – President of Franchising, Winmark Corporation; Angela Cote – Franchisee, M&M Food Market; Diana Mead – Owner, Onepoint; Rory O’Dwyer – CEO, Shapes Franchising, LLC

3. Grassroots Marketing 2.0 – Guerilla Style

Today’s spectrum of non-traditional marketing and innovative tools and technology, including the many aspects of digital and social media marketing, takes Grassroots Marketing to a new level. Sharing information, interacting with target audiences and engaging in compelling conversations are progressively paramount to earning the right to present calls-for-action for both consumer and candidate proposition. This session will provide examples and answer questions about how to utilize Grassroots Marketing 2.0 in a Guerilla-style approach to help brands stand out from both the noise and crowd for optimum results.

Moderator: Paul Segreto – CEO, Franchise Foundry

Panelists: Brian Mattingly – CEO, Welcomemat Services; Sally Facinelli, CFE – VP of Franchise Division, LocalBiz360; Rick Batchelor – CEO, Qiigo; Keith Levenson – COO, ClimbZone Franchising, LLC

4. Leveraging Brokers and Consultants to Maximize Results in the Franchise Development Process

This session will provide key advice and strategies for emerging brands on the following topics: what working with consultant networks can offer your brand, both short and long term; what networks look for in selecting brands; maximizing the quantity and quality of leads with brokers; the time, energy and financial commitment involved in working with consultants; and how to get results with brokers when offering single unit or multi-unit deals. Learn what really works (and what doesn’t) from the experts!

Moderator: Peter Barkman – Managing Partner, BrandONE

Panelists: Nick Neonakis – CEO, The Franchise Consulting Company, Inc.; Jania Bailey – CEO, FranNet, LLC; Anna Phillips – President, The Lash Lounge Franchise; Don Daszkowski – Founding Member, IFPG; Kelly Wyatt – President, Apex Development Inc.

1:00-2:30 Working Lunch Session

Valuing your company can be quite the negotiation. Given that it may be your largest asset, this is serious business! So what are the significant factors that affect the worth of your business? What do strategic buyers and private equity firms value most when looking at a company? What can you start doing today that will help your valuation in the future? In this session, learn from industry experts on how to make your business more valuable.

Moderator: Jay Duke – National Partner, Franchising and Advisory Services, BDO

Panelists: Susan Beth – COO, NRD Capital; John Goldasich – Partner, Arlington Capital Advisors; Sarah Roth – Partner, The Riverside Company; Dan Monaghan – Managing Director, Clear Summit Group



2:45-3:45 Breakout Sessions #3

1. Public Relations: Generate Buzz for Your Brand

Public relations can be a driving force behind your brand's growth. As soon as your doors open for business, you have a story to tell, and a PR team that understands franchising can create an effective and compelling message to introduce your brand to its target audiences. Our panelists will discuss the use of media outreach, content creation and marketing efforts to kickstart the growth of your franchise. So if you're wondering when the best time to use public relations is, we say, "Why not now?"

Moderator: Mike Miseti – Managing Partner, Franchise Elevator

Panelists: Dan DiZio – CEO & Co-founder, Philly Pretzel Factory; Renee Maloney – Owner, Painting with a Twist; Laura Coe – President, Snapology; Bill DiPaola – President & COO, Dat Dog Enterprises

2. Establishing the Fundamental Building Blocks of Marketing Support for Emerging Brands

Now that you have established your business, what tools will you provide your franchisees to help them grow theirs? This discussion will center on prioritizing and deciding where to draw the line on local control. Our panelists will share best practices and real life challenges they have faced in order to help you move forward in building a successful marketing platform for your company. Panelists will also discuss how emerging brands should decide where to spend limited ad fund dollars to get the most bang for their buck, and help set up franchisees for success. The panel will discuss how one franchisor helped grow their marketing support over time as well as tools and support needed to ensure franchisee success.

Moderator: Rocco Fiorentino – Vice Chairman, Benetrends Financial & CEO, Primos Hoagies

Panelists: David Lane – President & CEO, LevLane Advertising; Barbara Safina – Franchise Account Manager, Cockrell Enovation; Barbara Moran-Goodrich – CEO & Co-founder, Moran Family of Brands; Greg Tanner – Partner, Tanner Franchise Group, Inc.; Devan Kline – CEO, Burn Boot Camp

3. Solving for the "X Factor" in Franchisor Growth Equation: Growth = X + Capital

This panel of seasoned franchisors and investors will discuss the components that make up a brand's "X Factor" – the quality that private equity firms, other investors and franchisees all look for. Hear firsthand the best strategies for making your business scalable and attractive, and what you can do in early stages to make sure you're set up for healthy growth. We'll break down the "X Factor" into concrete components, like consistent documents and well-incorporated technology that you can prepare today so your brand is ready to expand tomorrow.

Moderator: Lane Fisher – Managing Partner, Fisher Zucker LLC

Panelists: Jeremy Holland – Managing Partner, The Riverside Company; Todd Leff – President & CEO, Hand and Stone Franchise Corp.; Charlie Chase – President & CEO, FirstService Brands, Inc.; Mark Siebert – CEO, iFranchise Group

4. Empowering Your Franchisees with Purpose & Value: Conferences, Committees, FACs

Learn from experienced franchisors and industry experts how to maximize value and engagement with your franchisees by developing powerful committees, advisory councils and national and regional conferences. Find out how some of the most influential franchise brands have created amazing cultures of success and accountability while receiving rave reviews from their franchise owners. This session will provide insight, tools, and specifics from seasoned franchise experts and is a “must-attend” for emerging brands!

Moderator: Scott Frith – CEO, Lawn Doctor

Panelists: Jim George – President & CEO, The Snip-Its Corporation; Charlie Graves – CEO, Athletic Republic; Shannon Wilburn – CEO, Just Between Friends Franchise System Inc.; Greg Muffuletto – Senior Account Executive, Listen360; Lane Kofoed – CEO, Assisting Hands Home Care

5. Millennials in Franchising

More and more every day, the millennial generation is shaping the future of franchising. Millennials expect flexible work lives, empowerment from their superiors and a consumer experience crafted around their needs. These paradigm shifts will change franchise sales tactics, office culture, in-house technology and marketing strategy forever. Hear from millennial franchise executives themselves on what works with their generation as they help you navigate the complex mind that is the millennial.

Moderator: Zachary Fishman – Sales Director, Metric Collective

Panelists: David Blue – Co-Founder, Blue Moon Estate Sales; Omar Soliman – Co-Founder, CHHJ; Carmelo Marsala – President & Founder, Spray-Net; Danny Nieves – Founder & CEO, Local Door Coupons; Sammy Aldeeb – CEO, Urban Bricks Pizza

4:00-5:00 Franchisor Mentor Session

In this franchisor-centric general session, franchise veterans will offer advice and reply to attendee questions generated during the event.

Mentor Speakers: Charlie Chase – President & CEO, FirstService Brands, Inc.; Shelly Sun – CEO, BrightStar Group Holdings, Inc.; Steve Greenbaum – President, Global Franchise Ventures; Rocco Fiorentino – Vice Chairman, Benetrends Financial, & CEO, Primos Hoagies

6:00 Dinner at the 23rd Street Armory



Wednesday September 27th

7:00-8:15 Breakfast

8:15-9:15 Opening General Session with Jeff Platt, CEO of Sky Zone

9:30-10:30 Breakout Sessions #4



1. Franchise Lead Generation: Smart Ways to Generate Quality Leads on a Limited Budget.

Starting a franchise is costly and budgets need to be prioritized. All too often, lead generation is underfunded and understaffed while the franchisor is awaiting positive cash flow. This session explores lower cost options to catch, connect with and close franchisees. On this panel, we'll be focusing on the "PESO" (Paid, Earned, Shared, Owned) lead gen opportunities and building a process for getting those higher quality lead candidates into a conversation on a limited budget. It all starts with understanding your target audience, their motivations and their content consumption behaviors, then using media solutions to deliver your message when and where they are most receptive. We'll learn how our panel of experts earned franchise candidates using a smarter process - not bigger budgets.

Moderator: Dawn Kane – CEO, Hot Dish Advertising

Panelists: Jam Hashmi – CEO, Clicktects; Patricia Perry – VP Franchise Development, Blink Fitness; Adam Terranova – Marketing Manager, Philly Pretzel Factory; Jeff Wall – CEO & Owner, Handyman Connection; Mike Rotondo – CEO, Tropical Smoothie Café

2. Landing the Big Fish: Selling Multi-Unit Deals

This session will cover issues a franchisor should be considering before offering multi-unit deals and we will discuss: if your brand is structured for multi-unit sales, and what should be in place; the various paths to take, such as area development agreements, master franchise agreements, licensing agreements and the multi-unit model; and panelists' experiences selecting buyers, setting development schedules and effective market planning.

Moderator: Neal Courtney – CEO, Cookie Cutters Haircuts for Kids

Panelists: Candace Couture – VP of Franchise Sales, Planet Fitness; Michael Landry – VP of Franchise Development, Rent-A-Center; Gary Robins – President, The G&C Robins Company; Doug Schadle – CEO, Rhino 7 Franchise Sales and Development

3. Infrastructure: Who to Add and When

This session will focus largely on building up solid infrastructure and human capital in your brand. We will be discussing ways to prevent joint-employer liability and avoiding foreseeable organic growth obstacles, as well as the effect of federal and state regulations on labor costs, and ways that you can leverage economies of scale to manage your labor costs competitively.

Moderator: Adam Robinson – CEO, Hireology

Panelists: Theresa Huszka – Senior Consultant, MSA Worldwide; Ed Kelley – Advisor, Emerging Franchisors; Cathy Skula – SVP, Rent-A-Center; Laura Novak – Founder & CEO, Little Nest Portraits; Greg Carafello – President, Executive Franchise Group LLC & Master Franchisee, Cartridge World

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4. Closing More Sales by Using Outsource Franchise Sales Teams and whether to use a “broker” or consultant

The process by which franchise leads become franchisees is fraught with financial, legal, and real estate roadblocks. Luckily, there are services that can help franchisors sift through leads to find qualified franchise candidates. During this session, panelists will discuss the benefits of using outsource franchise sales, development teams and referral networks to navigate today’s challenging economy.

Moderator: James Channer – Advisor, Fuzz Wax Bar

Panelists: Michael Haith – CEO, Teriyaki Madness; Andrew Horton – Consultant, FranChoice; Lory Meyerson – President, Pinnacle Franchise Development; Susan Stilwell – Business Development Strategist, The Entrepreneur’s Source; Todd Kirby – Partner, St. Gregory Development Group; Colette Bell – Director of Business Development, SMB Franchise Advisors

5. Gaining Momentum: Beyond Emerging

Where do you take your emerging brand from here? Learn from experienced franchisors about how to plan for the next stage of growth. Learn how these franchisors embrace leadership and build strong leaders. Hear them discuss international expansion, and what to consider when deciding “to go, or not to go?”

Moderator: Ryan Zink – CEO, Franchise FastLane & Co-Founder, Complete Nutrition

Panelists: Hao Lam – CEO, Best in Class Education Center; Javier Solis – President & CEO, Los Taxes Franchise Corp; Rita Goldberg – Owner, British Swim School; Frank Milner – President, Tutor Doctor

10:45-12:00 Group Exercise

12:00-1:30 Lunch (Working Lunch for Group Exercise Participants)

1:30-3:00 Group Exercise Team Presentations

