

FRANCHISORS.COMmunity

PRESENTS

SEP 18-20 | PHILADELPHIA

# SPRINGBOARD

A SPECIAL EVENT FOR **EMERGING** & **(RE)EMERGING** FRANCHISORS.



2019 AGENDA

## Wednesday, September 18

9:00 – 2:00

Fran-Guard™

INDEPENDENCE

IFA's Franchise Sales Management and Compliance Program (300 CFE Credits)

12:00 – 2:00

Registration

Beat the Thursday morning line! Come by and grab your badge, t-shirt, and welcome bag before you head to the Clinics.

2:00 – 3:15

Operations Clinic

GRAND BALLROOM

The operations 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:** Jack Monson – Chief Revenue Officer, Social Joey

**Panelists:** Shannon Wilburn – CEO & Co-founder, Just Between Friends; Marty Ferrill – President, Philly Pretzel Factory; Paul Altero – Founder, Bubbakoo's Burritos; Scott Frith – CEO, Lawn Doctor; Kyle Smith – CEO, Nothing Bundt Cakes; Bruce Lane – VP, Operations and Franchise Services, TravelCenters of America; Steve Rothenstein – Senior Director, Franchising, Dippin' Dots & Doc Popcorn

3:30 – 4:45

Lead Generation & Franchise Sales Clinic

GRAND BALLROOM

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 plan; the most effective lead generating sources over the past year; understanding the basic metrics; non-paid media sources (including referral programs, networking opportunities and customers); additional media channels (including internet, brokers and PR); franchise advertising in trade media, trade show 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 converting leads to new franchisees and will cover: best practices for converting leads into candidates, and candidates into franchisees; Discovery Days; validation calls with franchisees; closing the deal; using the FDD as a sales tool; and crafting a legal and compelling Item 19.

**Moderator:** Tom Wood – President & CEO, Floor Coverings International

**Panelists:** Candace Couture – VP, Business Development, Planet Fitness; Jania Bailey – President & CEO, FranNet; Keith Gerson – President, FranConnect; Gary Findley – CEO, Restoration1; Joseph Mohay – Chief Revenue Officer & Co-Founder, Integrated Digital Strategies; Tom Portesy – President & CEO, MFV Expositions

6:00 – 8:00

Welcome Reception

Join us for drinks, light bites and games at [The Post!](#)

129 S 30th Street, Philadelphia, PA 19104



## Thursday, September 19

7:00 – 8:00 Breakfast

8:00 – 8:30 Welcome & Opening **GRAND BALLROOM**

8:30 – 9:30 Keynote Address by Catherine Monson & Don Lowe **GRAND BALLROOM**



9:45 – 10:45 Clinics

### Finance Clinic **SALON I**

The finance 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. The clinic will cover: whether to use debt or equity as growth capital; the new FASB standards and how it may impact financial statements and finance; common legal issues, such as corporate structure and state franchise examiner review; the pitfalls of guaranteeing leases and loans for franchises; and valuing emerging franchisors.

**Moderator:** John Goldasich – Managing Director, Arlington Capital Advisors

**Panelists:** Mike Zyborowicz – Partner, Citrin Cooperman; Diana Mead – Managing Partner, OnePoint; Tim Seiber – Director, Franchise Relations, FranFund; William St. Clair – Managing Shareholder, St. Clair CPAs; Kevin Wilson – CEO, Buzz Franchise Brands; Rob Sharkey – CFO, Senior Helpers

### Franchise Relations Clinic **SALON II**

The relationship between franchisor and franchisee is often likened to a marriage, where there's give and take on both sides, trust and open communication are essential, and the setting of realistic expectations—and then living up to them—is paramount.

In this clinic, you'll hear franchisors and franchisees discuss how to effectively establish a strong relationship: one that doesn't rely on pulling out the franchise agreement any time there's an issue. Learn tips for franchisee engagement and get candid advice on what to do when conflicts do arise—because they will. Panelists will also discuss their experiences in creating a culture of transparency and how ongoing support impacts a franchise's ability to grow beyond the emerging brand stage.

**Moderator:** Laura Michaels – Editor, Franchise Times

**Panelists:** Steve White – President & COO, PuroClean; Andrew McCuiston – President, Goldfish Swim School; Gary Robins – Multi-Unit Franchisee, Supercuts; Scott Taylor – President & CEO, Walk-On's Bistreaux & Bar; Emma Dickison – CEO, Home Helpers; Carty Davis – Partner, C Squared Advisors



## 11:00 – 12:00 First Round of Breakout Sessions

### I. YoungConference Preview DIRECTOR'S ROOM

Have you heard the buzz? Our newest event, Franchise YoungConference, is a place for the young (and young-minded) innovators in franchising to gather and share their knowledge and strategies to navigate the ever-increasingly digital realm. If you haven't begun considering how to implement the latest technologies – and create your own – to build your business, you're getting left in the dust. While their older counterparts may take the lead in experiential knowledge, successful CEOs of all ages are increasingly looking to their younger peers – and even employees! – for insight on innovation, creativity and thinking outside the box. We invite you to join the movement before it's too late.

**Moderator:** Zack Fishman – Director of Innovation, Fishman PR

**Panelists:** Jami Stigliano – CEO, DivaDance; Omar Soliman – CEO & Co-founder, College Hunks Hauling Junk; Ryan Combe – Managing Partner, Better Way Franchise Group; Ryan Hicks – VP, Business Development, Rallio

### II. Rethinking PR for Emerging Brands: Fresh Approaches to Kickstart Your Concept INDEPENDENCE

Between media landscape shifts and significant increases in competition for earned media, emerging brands have to fight harder than ever to gain PR exposure. As the whole definition and scope of PR is changing, how can emerging brands capitalize on new opportunities, as well as side-step potential threats to their reputations in the early stages of launch? Our panelists will share how you can use media relations, social influencer relations and content marketing to kick start the growth of your franchise, as well as specific strategies to deliver compelling messages to introduce your brand to key target audiences.

**Moderator:** Debra Vilchis – COO, Fishman PR

**Panelists:** Amy Reed – President & Co-founder, Woofie's; Catherine Deano – Founder, Painting with a Twist; Lori Shaffron – Senior Director, Franchise Sales, Rita's Italian Ice; Heather Davis – Marketing Director, Kiddie Academy

### III. Leveraging Brokers & Consultants SALON I

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- or multi-unit deals. Learn what really works (and what doesn't) from the experts!

**Moderator:** Peter Barkman – Managing Partner, BrandONE

**Panelists:** Red Boswell – President, IFPG; Ken McAllister – President & CEO, My Salon Suite; Jonathan Thiessen – Chief Development Officer, Home Franchise Concepts; Iric Wexler – Advisor, BeHomeSafe



#### IV. Set Them Up for Success: Franchisee Onboarding

SALON II

Getting a new franchisee up to speed quickly has many benefits. This panel of seasoned franchise veterans will share the onboarding strategies they've designed to accelerate openings and improve engagement. Attendees will walk away with real-life examples and best practices for getting new locations up, running and successful. Topics will include: the impact of financing on the on-boarding process; financing single- and multi-units; real estate; how to select and plan for your top ten 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:** Gary Occhiogrosso – Founder & Managing Partner, Franchise Growth Solutions

**Panelists:** Cathy Skula – Executive VP, Franchising, Rent-A-Center; Rich Wilson – President & CEO, Paul Davis Restoration, Inc; Brian Garrison – COO, Buzz Franchise Brands; Sam Caucci – Founder & CEO, 1Huddle

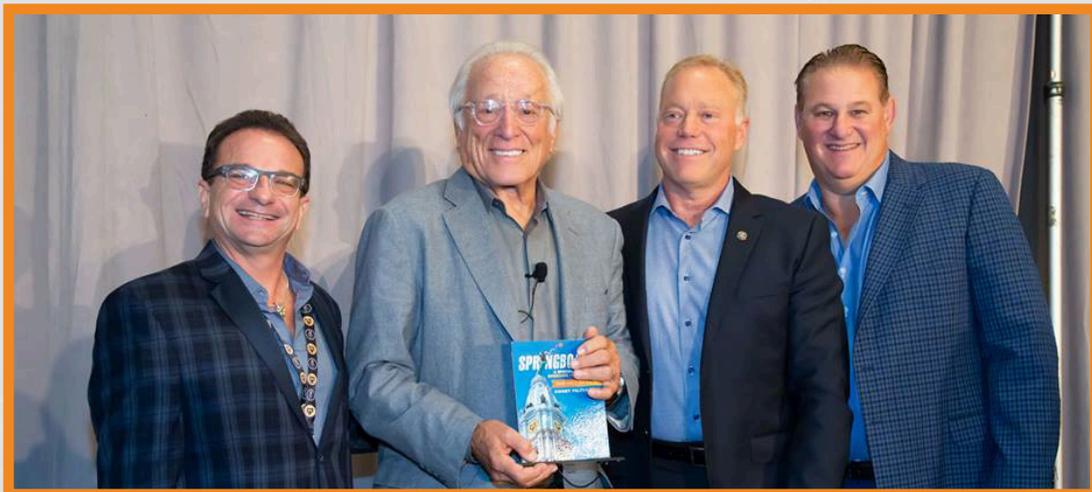
#### V. Effectuating Change through a Franchise System

SALON III

In order to maintain their competitiveness, franchise systems must evolve over time to grow market share, improve profitability, respond to competition, and make effective use of technology. Effectuating change through a franchise system in which individual units are independently owned and operated and are governed through a long-term contractual relationship, which often differ from one another in the same system, can be challenging. The panel will discuss what terms your franchise agreement should have from the “get-go” including flexibility, how to communicate change that promotes system “buy-in” and how to address challenges to change.

**Moderator:** Dr. John P. Hayes – Titus Chair for Franchise Leadership, Palm Beach Atlantic University

**Panelists:** Stephen Smith – CEO, HOTWORX; Patrick Sugrue – Managing Partner, Glenbeigh Capital; James Walker – Senior VP, Restaurants, Nathan's Famous, Inc; Jeremy Morgan – CEO, WellBiz Brands; Peter Viitre – Partner, Sotos LLP





12:15 – 1:15 Working Lunch Session **GRAND BALLROOM**

### Springing to the Next Level: Preparing Now for Third Party Capital Investment

Preparing your business for next level of growth using third party investment is incredibly important to the future of the franchise. Given that it may be your largest asset, this is serious business! So, what are the significant factors to consider when preparing for growth via third party capital investment? What do strategic investors, private equity firms and other potential investors value most when looking at your company? What can you start doing today that will help you prepare for the future? In this session, learn from industry experts on how to prepare and make your franchise more attractive for capital investment.

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

**Panelists:** Steve Murphy – President of Franchising, Winmark Corp; Todd Leff – President & CEO, Hand & Stone; Anthony Polazzi – President & CEO, AP Franchised Concepts; Matt Frankel – Partner, Levine Leichtman Capital Partners

1:30 – 2:30 Second Round of Breakout Sessions

#### I. You're Not Using Brokers; What's the Best Way to Boost Internal Sales? **DIRECTOR'S ROOM**

In this panel, hear firsthand from franchisors that couldn't get into the broker groups in the early stages of their franchise. They will share what they did to generate leads and grow their business until they were ready to begin using brokers, and discuss actions you can take to address operational obstacles and groom your system for a faster roll-out. Panelists will also discuss the reasons some brands will never be a fit for brokers.

**Moderator:** Ryan Zink – CEO, Franchise FastLane

**Panelists:** Scott Mortier – Chief Revenue Officer, Dental Whale; Carrie Evans – Director, Franchise Development, Chicken Salad Chick; Tim Courtney – VP, Franchise Development, PuroClean; Bryan Klein – Founder & CEO, The MAX Challenge; Josh Morgan – COO, Melt Shop

#### II. How to Define & Differentiate Your Brand in a Crowded Industry **INDEPENDENCE**

During this session, we will discuss the ways 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'll 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:** Joseph Mathews – CEO, Franchise Performance Group

**Panelists:** Brian Gross – President, Bach to Rock; Shane Evans – Founder & President, Massage Heights; Jeff Salter – CEO, Caring Senior Service; Brian Cygan – CEO, The Exercise Coach; Gary Huether – President & Co-founder, Arooga's Grille House & Sports House

### III. Franchisees Tell All

SALON I

Hear their side of the story! Gain firsthand insight from franchisees on what makes a system attractive – and what doesn't. During this session, we will hear from franchisees on what they look for as prospects, and what motivates them as franchisees.

**Moderator:** Brad Fishman – CEO, Fishman PR

**Panelists:** Jesse Keyser – Multi-Unit Franchisee; JD Busch – Chief Energy Officer, Busch Global; David Druker – President, The UPS Store Canada; Jeff Klein – Multi-Unit Franchisee; Tamra Kennedy – Franchisee, Taco John's

### IV. Don't Get Left Behind: Grassroots Marketing 2.0

SALON II

Today's spectrum of non-traditional marketing and innovative tools and technology, including 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:** Sally Facinelli – Advisor, Consumer Fusion

**Panelists:** Rick Batchelor – CEO, Qiigo; Justin Mink – Senior VP, Sales, Scorpion; Tara Thomas – Regional Vice President of Sales, SOCI; Martha O'Gorman – CMO, Loyalty Brands, Inc.

### V. Early Phase of Brand Scalability: Actionable Insights

SALON III

Your brand has validated its model and begun selling franchises. It's time to develop a strategy for building the necessary manpower, enhancing franchisee support systems and solidifying culture to support the coming growth. In this session, we will discuss the different stages of growth and related inflection points, focus areas and action plans to get to the next stage, identifying if and when capital is needed for sustaining new unit growth, and how to propagate your culture from corporate operations to the franchised units.

**Moderator:** Jason Kealey – President, FranchiseBlast

**Panelists:** Paul Steck – COO, Spread Bagelry; Bryon Stephens – Co-founder, Pivotal Growth Partners; Jeff Herr – President, St. Gregory Development Group; Ed Samane – CEO, Pro Martial Arts Franchise Corp; Mike Weinberger – COO, ONE Cannabis Group





## 2:45 - 3:45 Third Round of Breakout Sessions

### I. Does Leveraging Outsourced Franchise Development Make Sense for Your Brand?

DIRECTOR'S ROOM

Finding new franchisees that fit your business, brand and culture is mission critical for an emerging franchisor. Many brands run an "in-house" development effort to find, educate and secure their new franchisees. Others have chosen to outsource this area of their business to professional franchise development services. Join us to hear from the experts and gain the knowledge necessary to decide if outsourced development makes sense for YOU!

**Moderator:** Andrew Horton – Consultant, FranChoice

**Panelists:** Steve Gardner – Founder, QSR Franchise Development Group; Lory Meyerson – President, Pinnacle Franchise Development; Neal Courtney – CEO, Cookie Cutters Haircuts for Kids; Cameron Cummins – Co-founder, Pivotal Growth Partners; Carey Gille – President & Co-founder, Franchise FastLane

### II. Change the Course of Your Emerging Brand: The Female Leadership Perspective

INDEPENDENCE

This panel of successful female franchisor founders will explore the unique leadership skills, emotional intelligence and other business strengths that female leaders bring to the table within a company. Regardless of your gender, all session attendees will walk away with a better understanding of the inherent qualities and perspectives that separate male and female leaders, how to maximize the female perspective and influence to enhance your franchise sales process and how female leadership within your organization can help positively encourage a healthy franchisor/franchisee relationship.

**Moderator:** Sherri Fishman – President, Fishman PR

**Panelists:** Liberty Bernal – COO, Baby Boot Camp; Karissa Johnson – CEO, Moms on the Run; Jennifer Cutillo – Director, Operations, BeBalanced; Andrea Scott - CEO & Co-founder, skoah; Anna Phillips – Founder & CEO, The Lash Lounge

### III. Creating a Thriving Culture of Engagement, Alignment, and Collaboration with Your Franchisees

SALON I

Franchising is built on relationships. So, how do you make sure you start off on the right foot with franchisees and create a relationship that's built to last? It all starts with bringing the right people into your system. Our panelists will discuss candidate profiling techniques, marketing to candidates, the importance of gauging satisfaction early and often, and what to do when good relationships go bad.

**Moderator:** Mike Misetic – Managing Partner, Franchise Elevator

**Panelists:** Hao Lam – CEO & Chairman, Best in Class Education Center; Jonathan Weathington – CEO, Shuckin' Shack Franchising; Barry Falcon – Consultant, iFranchise Group; Frank Milner – President, Tutor Doctor

#### IV. Item 19: Using Your FDD as a Sales Tool

SALON II

Many franchisors don't 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." This makes it critically important to review the disclosure document and franchise agreement with your prospects, 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:** Dan Durney – Director, Franchise Development, Assisting Hands Home Care

**Panelists:** David Allsman – Partner, FisherZucker, LLC; Nick Sheehan – VP, Sales, St. Gregory Development Group; Alesia Visconti – CEO, FranServe; Bob McQuillan – VP, Franchise Development, Hand & Stone; Max Staplin – In-House Counsel, Brightway Insurance

#### V. Franchise Lead Generation: Smart Ways to Generate Quality Leads

SALON III

This session will be a direct conversation with franchisors to help them find ways to generate high quality leads, by developing an effective strategy, analyzing available lead sources, implementing a plan, tracking and evaluating their results and, if necessary, pivoting to improve their lead generation efforts. Attendees to this panel can expect to learn some of the general data about lead to deal ratios from popular lead generation categories. Our panel of experts will speak to their experiences with various categories of lead sources, such as websites (owned and paid), social, text and email marketing, brokers, shows/conferences, print and other. This is an interactive session and attendees can expect to leave the session with actionable intelligence that they can implement in their franchisee acquisition programs immediately.

**Moderator:** Paul Fishback – VP, Franchise, Entrepreneur Media, Inc.

**Panelists:** Jeff Wall – CEO & Owner, Handyman Connection; Jam Hashmi – CEO, Clicktects; David Mesa – CDO, Ballard Brands; Alex Samios – VP, Franchise Development, Dogtopia; Scott Abbott – CEO, ProNexis

4:00 – 5:30

Franchisor Mentor Roundtables with Opening Remarks from Charlie Chase, Steve Greenbaum & Sam Ballas

GRAND BALLROOM

6:30-9:30 Springboard Soirée

Join us for a night to remember! Come eat, drink and network with your fellow Springboarders at the Fairmount Water Works, one of Philly's finest establishments.

640 Waterworks Drive, Philadelphia, PA 19130



## Friday, September 20

7:00 – 8:00 Breakfast

8:00 – 8:15 Welcome & Opening **GRAND BALLROOM**

8:15 – 9:15 General Session with Chris Dull, hosted by John Teza **GRAND BALLROOM**



9:30 – 10:30 Fourth Round of Breakout Sessions

### I. Find "the" Site: Pre-Construction & Build Out for Your Brand

**DIRECTOR'S ROOM**

Organizing a process for site selection, lease review and build-out is essential to both a system's success and to securing a franchisor's interest in real estate. This panel will discuss the site selection process including developing site standards, the approval process and how to use and get noticed by developers. Reviewing and approving a franchisee's lease can be a hairy process. Panelists will discuss walking the fine line between maintaining standards and implementing a process, and balancing the independent nature of the franchise business – where to draw the line, what's flexible and what's not. The panel will also discuss the build-out process and how to create a "store-in-a-box," who's responsible for what and when, and what tools exist to coordinate the process.

**Moderator:** Eddie Goitia – Partner, FranLaunch

**Panelists:** Tim Matey – National Account Executive, FC Dadson; Kyle Mann – Vice President, ELEDLights; Rob Cambuzzi – Founder & CEO, RPM; Ty Brewster – Retail Broker, Keyser; David Nicolson – President, FranSite

### II. Preparing Your Franchise System for the Future

**INDEPENDENCE**

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 cover 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:** Paul Rocchio – Vice President, Development & Member Services, IFA

**Panelists:** Tom Epstein – CEO, Franchise Payments Network; Denny Stone – Director, National Accounts and Programs, PrimePay; Gary Goerke – President & CEO, Clarity Voice; Tom Whytsell – Account Executive, Enterprise, Xpressdocs; Lisa McCarthy – Founding Partner & COO, Out Of The Box Technology

### III. Benefits of Partnering with a Funding Provider

**SALON I**

How do I navigate the various funding options for growth? How do franchisees of emerging brands obtain financing? Without the long history that more mature brands bring to the financing table, what does an emerging brand have to show to ensure its offer is bankable? This session will discuss what franchisors can do to make it easier for their prospects to obtain financing. What kind of prospect should franchisors be looking for? One that's bankable! We'll learn what the qualifications are and what financing options are available to franchisees.

**Moderator:** Ron Bender – VP, Franchising, EnviroLogik

**Panelists:** Allison Zorich – Director, Business Development, Guidant Financial; Doug Schadle – CEO, Rhino 7; Tom Hodgson – CEO & Founder, Color World Housepainting; Dallas Kerley – President & CEO, Benetrends

#### IV. Motivating Franchisee Compliance

SALON II

There comes a time in every franchise system when a franchisor has to compel a franchisee's compliance. During this session, we'll discuss how to determine when to use the carrot, and when you need the stick. Hear strategies on instituting and obtaining franchisee "buy-in" on system changes. The panel will also discuss the risks a franchisor faces when taking action to compel compliance.

**Moderator:** William Graefe – Partner, FisherZucker, LLC

**Panelists:** Angela Cote – Franchise Growth Catalyst, Cultivate Advisors; Laura Coe – CEO & Owner, Snapology; Frank Robinson – Partner, Cassels Brock; Gerald Wells – General Counsel & Chief Compliance Officer, Rita's Italian Ice

#### V. Brand vs. Local: Who is Responsible for What?

SALON III

Now that you've established your business, what tools and training will you provide your franchisees to help them grow theirs? What expectations do you have of the franchisees to support their businesses in their local market? How do you ensure that they are complying with brand standards? This discussion will center on what should be the responsibility of the franchisor vs. the expectations of the franchisees in their given market. 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. The panel will discuss the strategies franchisors use to grow their marketing support over time, as well as tools, training and support needed to ensure franchisee success.

**Moderator:** Dawn Kane – CEO, Hot Dish Advertising

**Panelists:** Greg Sausaman – CEO & CDO, Topper's Craft Creamery; Russell Burnett – CEO & Founder, Online Image; Adam Terranova – Director, Marketing, Saladworks; Brian Mattingly – President & CEO, Welcomemat Services; Karen Wenning – Business Development Manager, Suttle-Straus

10:45 – 11:45

Digital Mastermind Session with Bedros Keuilian

GRAND BALLROOM

12:00 – 2:15

Working Lunch and Group X-Games

2:30 – 3:30

Group X Presentations

GRAND BALLROOM





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