



Broker's Guide to Office Systems Set up





FreeConferenceCall.com is the most recognized conferencing brand in the world with users in more than 800,000 businesses, including nearly all Fortune 500 companies. Service offerings around the globe with unlimited use include: high-quality HD audio conferencing, screen sharing, video conferencing, audio and visual recordings, customized greetings, security features, calendar integrations and mobile applications.

Key Facts:

- 100% Free Conference Call Service
- Free Online Meetings and Webinars
- Record and Share Any Call
- Quick and Easy Group Meetings
- Available on Demand!

SIGN UP

Note: Sign up is easy. Simply use your emails address.



RingCentral®

RingCentral, Inc. is an award-winning global provider of cloud unified communications and collaboration solutions. More flexible and cost-effective than legacy on-premise systems, RingCentral solutions empower today's mobile and distributed workforces to be connected anywhere and on any device through voice, video, team messaging, collaboration, SMS, conferencing, online meetings, contact center, and fax.

Key Facts:

- Free trial available
- Use RingCentral to establish your business phone number
- Includes webinar and call recording, Unique phone line
- Expense: Premium Plan: \$34/Month

SIGN UP

Note: Sign up is easy. Simply use your emails address.



Zoracle is a science-driven tool that determines franchisee-franchisor compatibility and predicts performance. Zoracle's meta-analysis methodology provides insights no singular profile, survey, algorithm or assessment can, and has changed the way in which franchisors select franchisees.

Key Facts:

- Free trial available
- Use RingCentral to establish your business phone number
- Includes webinar and call recording, Unique phone line
- Expense: \$119/Month

Email Wanda Heredia at w.heredia@franchiseba.com to sign up!

Note: Zoracle is a highly suggested and critical sales tool!



WHERE KNOWLEDGE IS POWER

IBIS World Industry Research Reports are powerful business tools that provide strategic insight and analysis on more than 1,000 US industries. Extensive, objective and easy to digest, IBISWorld research offers the very latest content on every US industry to help you make better decisions, faster.

Key Facts:

- Free Demo Available
- Expense: IBISWorld offers tailored memberships to suit any group: large corporations, government, academic institutions and small to medium businesses.
- IBIS World customer Service- 1-800-330-3772.

SIGN UP



QuickBooks is accounting software for small businesses. QuickBooks products are geared mainly toward small and medium-sized businesses and offer on-premises accounting applications as well as cloud based versions that accept business payments, manage and pay bills, and payroll functions.

Key Facts:

- Expense: \$5 - \$20 per month
- Process: QuickBooks is all online, so you can use it in a browser or on the mobile app. Once you connect your bank account, it only takes about five minutes to get up and running. We recommend QB online as it integrates with TieiT and is easier to use.

SIGN UP

Note: QuickBooks is the #1 Accounting software for Small businesses and independent contractors.



Dropbox is a file hosting service operated by American company Dropbox, Inc., headquartered in San Francisco, California, that offers cloud storage, file synchronization, personal cloud, and client software.

Key Facts:

- Free up to 500 megabytes of storage
- Expense: Premium services range from \$8-\$12 monthly

SIGN UP

Note: Click **here** to access a Dropbox Tutorial



Virtual Office Solutions

A virtual office is a physical mailing address you can rent to make your business sound more professional. With add-ons available like a receptionist with a local phone number, however, and private offices and meeting rooms for hourly rental, you can make a big impression when the time calls for it.tions.

Expense: \$79-128 per month

[MORE INFO](#)

Note: Having a virtual office decreases overhead expenses.



Buffer is a new and smarter way to share what you want to share on Social Media. People have called it great names before, like your Social Media Assistant or the Siri of Social Media.

What it does is simple. You add updates or social media posts to your Buffer queue and it will be posted for you well spaced out over the day - and at the best times.

It's like your magic box you can use anytime to fill with great Tweets, Facebook stories or LinkedIn updates. Just drop them in and you don't have to ever worry about when it will be posted, it's all taken care of by Buffer for you.

Expense: \$10 per month

[SIGN UP](#)

Note: Krystal Clark will be giving Buffer demo next week.



Canva is an easy-to-use graphic design tool that you use right in your browser. It allows you to make professional-looking images and graphics and offers tons and tons of free and \$1-only resources. You can start with common templates for your social media profiles, common post types, print documents and even Kindle book covers.

After creating your mini-masterpiece, you can download your work as image files or PDFs or immediately share them on your social media networks. Canva makes design simple for everyone. Create designs for web or print: blog graphics, presentations, Facebook covers, flyers, posters, invitations etc.

Expense: Free

SIGN UP

Fun Fact: This guide was created in Canva.



Built by linguists and language lovers, Grammarly's writing app finds and corrects hundreds of complex writing errors — so you don't have to. Grammarly is the world's leading automated proofreader. It checks for more than 250 types of spelling, grammar, and punctuation errors, enhances vocabulary usage, and suggests citations.

Professionals use Grammarly to provide expert help and instant feedback on the accuracy, impact, and credibility of their English writing in a variety of fields, such as law, healthcare, academia, marketing, engineering, and journalism.

Expense: Free

SIGN UP

Fun Fact: This tool is used by everyone on the FBA staff!



Wistia is professional video hosting with analytics and video marketing tools

Host, manage, and track your videos with the best video marketing tools in the (known) universe.

Wistia is professional video hosting for business. Their tool helps businesses add their videos to the web, track their performance, and find new ways to build and engage with their audiences using online video.

Expense: Free for up to 3 videos

[SIGN UP](#)



Trello is a task management app that gives you a visual overview of what is being worked on and who is working on it. It used the Kanban system, which was developed in Toyota as a system to keep production levels high and maintain flexibility. It is best represented as a whiteboard filled with post-it notes.

Say goodbye to post it notes and endless to-do lists. Say hello to the tool that will give you amazing productivity. Get things done with Trello!

Expense: Free - \$50 per month

SIGN UP

"I seriously cannot live without Trello. It is so very useful and keeps me super organized. Their phone app is fabulous!"

-Krystal Clark



Funding Partners





A true pioneer in the lending industry, Benetrends blazed a trail for 401(k)/IRA retirement funding with the innovative Rainmaker Plan®. They can also help client's find and secure the best options for SBA loans, business loans for women, equipment leasing and more.

Discover a variety of funding options Benetrends offers:

- Start-Up Loans
- Franchise Loans
- SBA Loans
- Small Business Loans For Women
- Securities-Backed Line Of Credit
- Capital Financing And Equipment Leasing

Click the register button to connect with Benetrends. When you are asked if you are worked with a consultant, type "Larry"

Contact Person:

Larry Carnell, CFE,CBI, CMT | VP of Business Development

1180 Welsh Road, Suite 280 | North Wales, PA 19454

Office Phone: 267.638.9010

benetrends.com | Larry@benetrends.com

REGISTER



An experienced team of professionals who knows franchising and business capitalization and will consult with your clients to explore their funding opportunities and determine the best option(s) for them. Whether they choose Equity Funding, using our Self-Directed 401(k), allowing an entrepreneur to use retirement monies (401k/IRA) to capitalize a business partially or completely, tax and penalty free from the IRS, and/or traditional Debt Funding, utilizing unsecured lines of credit or Small Business Administration (SBA) Loans, they are here to help you realize their entrepreneurial dream.

Expense: None

Process: Contact FundMyFranchise.com at (888) 467-0007.



The right financing can come from a number of places. In fact, most clients combine their primary method of financing with another option to reach their desired capital. Guidant Financial offers a full range of funding options.

Expense: None

PROCESS

There are two ways a new Broker can connect with Guidant. Through this become a partner **link** on our website or reach out to our FBA Consultant.

Ralph Nilssen

Email: ralph.nilssen@guidantfinancial.com

Senior Financing Consultant

Phone: (888) 472-4455 x3851

Direct: (425) 326-4618

Once registered, you will receive a link to your customized landing page containing an easy to use pre-qualification worksheet.

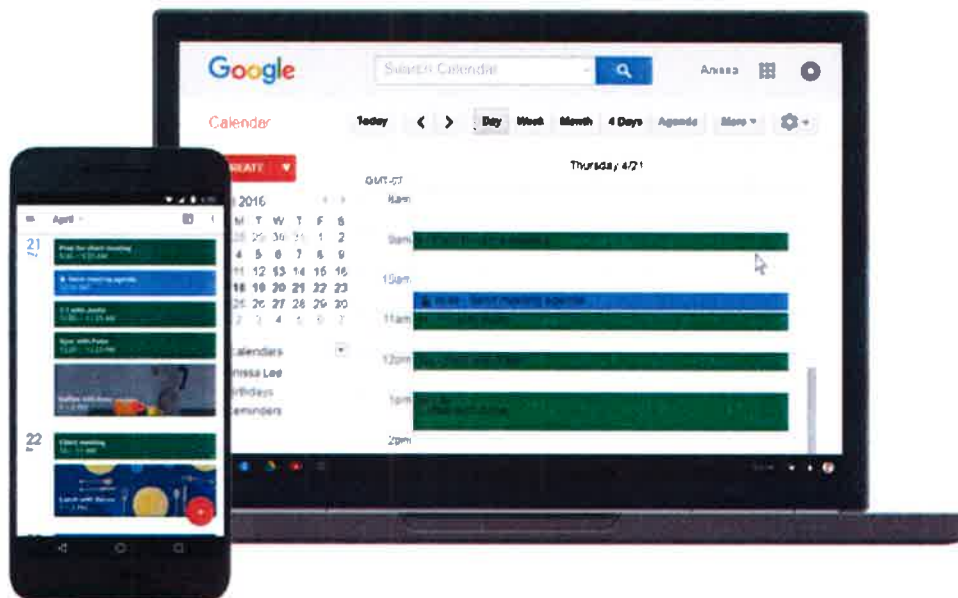


Calendar Management





31 Google Calendar



Introducing a way to keep up with all your appointments and upcoming meetings! Google Calendar application allows users to create personal or public calendars after signing up for a Google account. The accounts are free, and Google stores the calendars within its cloud computing system. That means that the company stores the application and user information on its own servers. The user doesn't have to download special software to access the calendar -- all access is through a Web browser.

Expense: Included in your FBA membership

Process: Training session is in day 5 of training



calendly

Say goodbye to email tag for scheduling appointments, interviews, calls, demos and much more. Calendly allows clients and zors to schedule appointments with you by clicking a link.

Expense: Free

The screenshot shows a Calendly booking page for the Franchise Brokers Association (FBA). At the top, there is a blue arrow pointing left, the FBA logo, and the text "Franchise Brokers Association". Below this, a blue circle with a white dot is followed by the text "30 Minute Meeting". To the right, it says "Times are in Eastern Time - US & Canada" with a dropdown arrow. In the center, there is a "Select a Day" section. Below this, there is a row of seven circular buttons representing days of the week. The first button is "Tue Feb 23" and is highlighted with a blue border. The second button is "Wed Feb 24" and is also highlighted with a blue border. The third button is "Thu Feb 25" and is labeled "unavailable". The fourth button is "Fri Feb 26" and is labeled "unavailable". The fifth button is "Mon Feb 29" and is highlighted with a blue border. The sixth button is "Tue Mar 1" and is highlighted with a blue border. The seventh button is "Wed Mar 2" and is highlighted with a blue border. To the right of the buttons is a blue arrow pointing right. Below the buttons, there is a blue button with the text "SIGN UP". At the bottom right, there is a link that says "After Mar 02" with a blue arrow pointing right.



HELPFUL FBA Vendors





LATHROP & GAGE_{LLP}



Eric Reiss is our Franchise Attorney and FBA partner, he can help you and your clients with various legal needs

Contact: Shelly Settles P:
314.613.2511 e-mail:
SSettles@lathropgage.com



Katzman Insurance can assist you and your clients with securing:

- Health Insurance
- Business Insurance
- Long-Term Coverage
- Live Insurance

Contact: Jack Katzmnn 800-967-5252



**SWARTZ & REEDER
ADVISORS**
CERTIFIED PUBLIC ACCOUNTANTS

Schwartz & Reeder Advisors is the accounting and tax services provider for FBA Brokers.

Contact: Michael Reeder, Mimi Reeder or Jonathan Pace

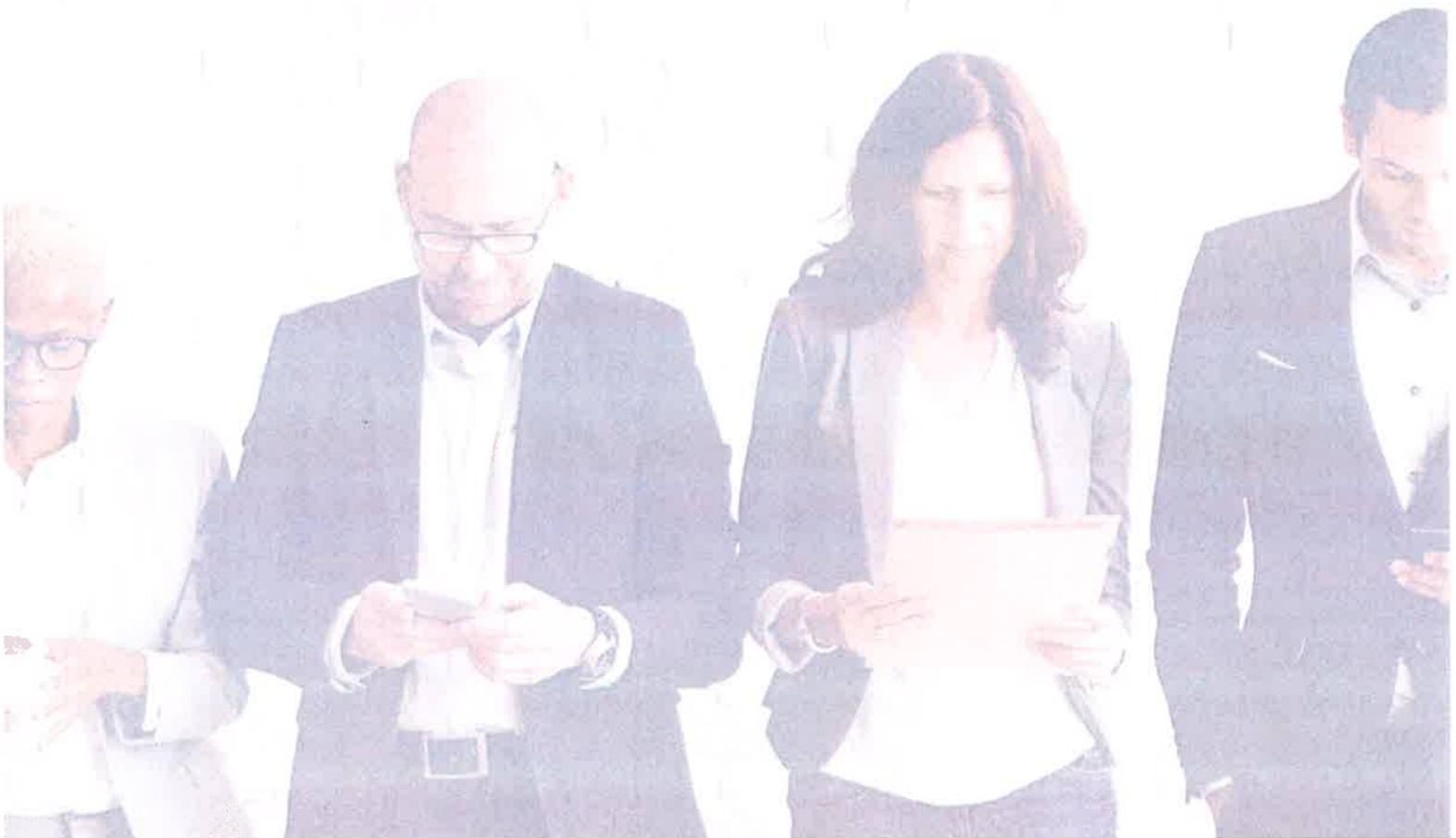
Phone: (847) 241-5800

Fax: (847) 241-5810

Email: admin@swartzreeder.com



LEAD Providers





5th Avenue Leads is a franchisee sales lead generation company that will get you the results you need in an industry where results are hard to get. Through the network of candidate acquisition programs that are linked to a wide variety of franchise categories, they can generate thousands of premium franchisee candidates in real-time. Their unique approach gets us the best, call-verified leads that we are proud to deliver to our clients.

Use: Lead Provider

Contact Person: Natalie Nutter, natalie@5thavenueleads.com



Franchise **Help**

For over 15 years, FranchiseHelp has provided guidance, tools, and expert advice to help consumers find their dream franchise. They advise that they are the world's largest independent information resource for those thinking about investing in a franchise, and it's their mission to help clients and brokers succeed.

Use: Lead Provider

Contact Person: Tim Gilboy, tim@franchisehelp.com