

## CANDIDATE RESEARCH (STEP 2)

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This is a second discovery call with the candidate. The call is rapport building and uncovers the minutia that is needed to build the right search parameters. It MUST be customized per candidate.

DO NOT send the Candidate Research Form to the candidate - this process should be a phone call.

### **CALL PREPARATION**

1. Based on the candidate's situation, prepare SPIN questions for the opening of this call.
2. Review the Zorakle SpotOn results and pick key-points to discuss with the candidate.
  - See Zorakle training for further instruction on learning the different work style and strengths.
3. Go to My Candidate System and ask the questions that are most appropriate for them. Write in those answers.
  - Open note section to capture detailed information.

### **IMPORTANT NOTES:**

- DO NOT ask all the questions on the call.
- DO NOT use repetitive questions.
- DO NOT use questions that you already know the answer to.
- DO NOT parrot back what they say.

## **CALL STRUCTURE**

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### **Touch Base**

At the beginning of the call, you want to get a feel for where the candidate's thoughts are relating to the project.

- *"Have you given any further thought to our call yesterday?" Or*
- *"Before we get started, I just want to check, has anything changed since we last spoke?"*
  - Go into PAIN – Use prepared SPIN Questions

Example lead into SPIN questions:

- *"I was thinking about your situation and I was wondering about something you've said ..."*

### **REVIEW THE RESULTS OF THE SPOTON! ASSESSMENT**

- *"You took the assessment yesterday. Thank you for that."*
- *"Did you have a chance to review the results?"*
- *"From what you saw, did you feel like it made sense to you?"*
- *"I'd like to dig in deeper to understand the information, and we will see if what it reported lines up with your view. Does that sound good?"*
- *"Let's get started. "*
  - Discuss at a high level what stands out about this candidate.

## UNDERSTANDING THE ZORAKLE SPOTON ASSESMENT

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As you review the assessment with your candidate regularly stop to ask them the following:

*“Do you agree with the information on the report?”*

*“Is there anything on it that you feel doesn’t match?”*

**Note:** One of the most important things to understand in this sales process is understanding the metrics. Knowing where the client’s profile stands compared to others is the key. To get this information, it takes practice with the tools. This guide gives you simple metrics to use in the meantime.

### SUMMARY PAGE

When going over the summary page you’ll keep the topics high-level and for the most part, will be bringing up and sharing the results of the assessment. Below we’ll list out a few things to keep in mind during this process.

- Values
  - Whenever you have an Achiever – that is great news because they fit with many franchises and have the widest range of concepts available to them.
  - Franchisors often list an Achiever as the desired Value for their franchisees.
  - Just state their Value at this step. You will go into more detail during the section.
- Mention splatter dots are times of change. This means that there is something going on in their life that is making the Value more important right now.
- Review their Work Style listed in the summary. Pay special attention to the following categories.
  - Pace
  - Workplace
- Competencies
  - Mention their highest competencies. These are their unique talents. We want to focus on franchises that keep them in these talents.
- Sales Orientation
  - Mention what are their sales orientation

## VALUES – #1 MOST IMPORTANT TO FIT

The purpose of this section is to talk about who they are and how that matches with the results. Values also indicate their key motivators.

- Looking at the Values chart, mention their top two Values.
  - Read the beginning sentence about them next to the chart.
- Notice any trends.
  - If the lines are nearly even, mention that this would indicate they can get along with and understand many different types of people.
  - If there is an extremely low Value, mention that we need to look for franchises that balance this and help you maximize your talents in the (name their highest) value.
- Values Hierarchy
  - Mention the top three in the list.
  - Looking at the 'dots', ask about the results within the 'splatter dots' and mention that these indicate characteristics that may be an area which is of a higher value to them right now. Ask them if they agree and why they think that is.
  - Note: 'Splatter dots' are temporary PAIN or misalignment. Large 'dots' still need to be carefully considered, because they are more permanent.

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| <p style="text-align: center;"><b>BELONGER</b></p> <p>A BELONGER is a hands-on business builder focused on long-term relationships and customer satisfaction. Motivated by a deeply rooted moral code they are hardworking and committed to providing for and protecting their loved ones. Family and security define success. They favor proven, practical service or solution-based businesses</p>                                                                      | <p style="text-align: center;"><b>EMULATOR</b></p> <p>EMULATORS are independent thinkers, quick to make decisions and enjoy taking risks. Demands a high degree of autonomy, diversity, and control. Question old ideas, authority, and systems while looking for innovative methods to grow their businesses. Independence and quick profitability are key factors in selecting a business.</p>                                      |
| <p style="text-align: center;"><b>ACHIEVER</b></p> <p>(Most franchises are looking for this characteristic)</p> <p>An ACHIEVER is a tenacious business builder never satisfied until they dominate the market. Motivated by achievement they have goal-oriented lifestyles and deep commitment to success. Results, respect, and control define success. They prefer unique, scalable, quality service, business-to-business or practical solution-oriented concepts.</p> | <p style="text-align: center;"><b>SOCIETAL</b></p> <p>A SOCIETAL is an intelligent and visionary business builder committed to influence, inspire and change the world. People in this group are motivated to have an impact on others using their expertise, experience, and education. Contribution and freedom define success. They prefer innovative, change or cause-based concepts that promote others' growth and success.</p> |

## **STAGES OF GROWTH - 2ND MOST IMPORTANT TO FIT**

Shows what stage of a company the candidate would be most comfortable and successful working with. There are five stages of growth.

Mention the Stages of Business that they will work best in and ask if they agree

- Entrepreneur: 1-19 franchise units
- Partner: 20-99 franchise units
- Plug & Play: 100-499 franchise units
- Empire: 500 - thousands of franchise units
- Hybrid: Thousands – Rebranding, Selling off, Downsizing, or Umbrella brands

## **CULTURE - 3RD MOST IMPORTANT TO FIT**

- Mention the culture they prefer.

## **WORK STYLE - 4TH MOST IMPORTANT TO FIT**

This section is what most people would see as the ‘personality’ side of the assessment. For greatest satisfaction and effectiveness one should seek a work or business environment consistent with their natural tendencies.

Mention the Work Style Chart

- Look for any trends.
- If the lines are nearly even, mention that this would indicate they can adapt to many different types of tasks and management duties.
- If there is an extremely low work style, mention that we need to look for franchises that balance this out and help you maximize your talents in the (name their highest) work style.
- Use the summary on the right to help with explaining this.

## **COMPETENCIES**

Discuss any competency that is extremely high or low.

- 8 or higher shows a very high competency.
- Most people don’t score at an 8 or higher.
- When you see low competencies, tell the candidate you want to select franchises that help to balance them out.
- One thing to look for is inconsistencies or conflicting traits because they are good discussion points to talk through with your candidates.

## **SALES & BUSINESS**

- Discuss the Sales Orientation.
- Discuss the Potential Business Path.
  - If your candidate is either a Corporate or Consultant/Contractor you will need to put them in a system that treats them that way. Either a resale or a massive brand.
- When you see Single Unit only...
  - Mention that the candidate is more likely to test and prove it out before moving to additional locations.
- When you see Multi Unit...
  - Mention that the candidate has the skills to manage multi-units.
- When you see Regional Developer...
  - Tell the candidate that this is rare. This is a particular type of leadership which rates Regional Developer. The results show the candidates capacity and skills qualify them to lead and enter geographic market.

## **NEEDS & WANTS**

- These are great to help you fill in the Candidate Research Form (CRF)
- If you discuss the items here, you won't have to ask the questions in the form.

## **META PROGRAMS**

Skip this section. This section is more useful for the broker to use, not best for a discussion with the candidate.

## SAMPLE TALKING POINTS IF THE CLIENT PUSHES BACK ABOUT THE QUESTIONING

Pay attention to your candidate's boredom, annoyance or disconnection. If you hear this, you must address it professionally.

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- *"I know this is a lot of questions, do you know why we ask these?"*
  - *"This is a big investment and is a complicated investment. Therefore, it is incredibly important to me that we do this right."*
  - *"Since I've only just met you, I have to know enough about what you are trying to do to make the right matches."*
  - *"Many times, it's more about eliminating what doesn't work first and then helping you decide between the things that are a match."*
  - *"I am investing in you up front because my objective is a long term partnership. I need you to be successful in the award process and I need to ensure you are successful as a franchise owner."*
  - *"That means that I'm not going away. I'm staying with you throughout this, giving you the real story and doing very high-level work for you."*
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## PLANNED ADVANCE

- Explain what happens next.
- Get their Zip Code or the Zip Code of the area they desire to own the business.
- Schedule the next call within a few days.

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- *"Next call we will go over some market research my team does on your area. We are going to look at your market,*
  - *"I will be giving you some training on what to look for in a franchise. My goal is to help you be able to identify the weak spots and advantages of franchise."*
  - *"I need you to be informed. My reputation is affected by who I present to the franchises and I want you to be approved for all the ones we look at so you get access to the best opportunities."*
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