



Candidate Research (Step 2)

Lesson Description: The purpose of this lesson is to explain the next step for a candidate. This is another crucial and important step in the process. Using a situation as the basis for learning, students will put their newly acquired knowledge into practice.

Prerequisites:

- What You Need to Know to Be a Successful Franchise Broker
- The question-based broker points of SPIN Selling
- Initial Call (Step 1)
 - Intro to CPA – Optional

Instructor: Amanda Ramirez, Franchise Sales Trainer

Quiz: Interactive Q&A throughout the week

This is a second discovery call with the candidate. The call is rapport building and uncovers the minutiae that is needed to build the right search parameters. It MUST be customized per candidate. Video sharing of the screen would be more effective to measure their responses.

Preparation For The Call

1. Prepare SPIN questions based on the candidate's situation prior to the call.
2. You should review the SpotOn and pick out key points you would like to discuss with the candidate.
 - By now, brokers should have completed the Zorakle training and should understand how to interpret SpotOn reports. To ensure that the candidate has received the SpotOn assessment link, call them to ensure they have received it.
 - If the candidate chose not to complete it, then the meeting must be rescheduled.
 - A special exception to this rule: they will not be running the business.

Note: Please do not use questions that you already know the answers to.

The Call Structure

A reference to touch base

When you first talk to a candidate, it is important to understand where their thoughts are related to this project.

- “Do you have any further thoughts about our conversation yesterday?”
- “Before I get started, I just wanted to ask if anything has changed since we spoke last?”

GO INTO PAIN – Use the SPIN questions you have prepared.

The following is an example script:

- “I was thinking about your situation and wondering about something you said...”

Review of SpotOn Assessment Results

The following are some examples of scripts:

- “You took the assessment yesterday. I appreciate you doing that.”
 - “Have you had a chance to review the results?”
 - “From what you saw, did it make sense to you?”
 - “I’d like to go into more depth to gain a better understanding.
 - It will be interesting to see if what it reported corresponds with what you think. How does that sound?”
 - Let’s begin.

Note: Talk about the candidate’s unique qualities at a high level.

Understanding the SpotOn Assessment Review

During the process of reviewing the assessment with your candidate, stop to ask them the following questions.

The following is an example script:

- “Are you in agreement with the information in the report?”
- “Is there anything on it that seems out of place to you?”

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

The Summary Page of the Assessment

When going over the summary page, you'll need to keep the topics high-level and for the most part, bring up and share the results of the assessment. These are a few things you need to keep in mind throughout the process.

1. Values

- If you have an Achiever – that's great news because they're compatible with many franchises and have the widest range of concepts to choose from.
- In many cases, franchisors list an Achiever as one of the desired values for their franchisees.
- Throughout the next section, you will go into further detail about their value.

2. Mention the splatter dots as times of change.

- There is something going on in their life right now that makes the value more important to them.

3. Review their Work Style listed in the summary. Pay close attention to these categories.

- Pace
- Workplace

4. Competencies

- Mention their highest competencies. Their unique talents make them stand out.
- Our goal is to keep them within franchises that value these talents.

5. Sales Orientation

- Explain what sort of sales orientation they have

Values – #1 Most Important to Fit

The purpose of this section is to talk about who they are and how it matches with the results. The values reflect their key motivators as well.

- **Mention their top two values by looking at their Values chart.**
 - The chart includes the beginning sentence that describes them.
- **Notice any trends.**
 - If the lines are nearly even, mention that this indicates they can work with many different types of people.
 - The key is to find franchises that can balance their talent with their (name their highest) value so that they can maximize their strengths.
- **Values Hierarchy**
 - Mention the top three from the list.
 - Observe the 'dots' and ask what the results appear to be.
 - Mention these indicate characteristics that may be an area that is of a higher value to them right now. Observe what they say and why they agree.

Note: 'Splatter dots' are temporary PAIN or misalignment. Large 'dots' still need to be carefully considered since they are more permanent.

SpotOn: Belonger

BELONGERS are hands-on business builders focused on building long-term customer relationships.

- Motivated by a deeply ingrained moral code
- Hardworking and committed to protecting and providing for their loved ones, they are hard workers.
- Success is defined by family and security.
- Business models based on proven practical solutions are preferred.

SpotOn: Emulator

EMULATORS are independent thinkers, quick to make decisions, and enjoy risk-taking.

- Has a high degree of autonomy, diversity, and control.
- Look for innovative ways to grow their businesses while challenging old ideas, authority, and systems.
- In choosing a business, independence and quick profitability are key factors.

SpotOn: Achiever

An **ACHIEVER** is a tenacious business builder never satisfied until they dominate the market. This characteristic is sought by most franchises.

- Motivated by success.
- These are goal-oriented people who are deeply committed to succeeding.
- Success is defined by results, respect, and control.
- A unique, scalable, quality service, a business-to-business approach, or practical solutions are preferred.

SpotOn: Societal

A **SOCIETAL** is a business builder who is committed to influencing, inspiring, and changing the world.

- People in this group are motivated to use their expertise, experience, and education to make a positive impact on others.
- Success is defined by contribution and freedom.
- They prefer concepts that promote others' growth and success, such as innovation, change, or cause-based concepts.

Stages of Growth – #2 Most Important to Fit

1. Indicate at what stage of a business the candidate would feel most comfortable and successful. Each stage of growth is divided into five categories.
2. Discuss the Stages of Business where they would be most productive and ask them if they are in agreement.
 - **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 – #3 Most Important to Fit

- Give an indication of their preferred culture.

Work Style – #4 Most Important to Fit

This section is what most people would see as the ‘personality’ side of the assessment. A work or business environment that matches one’s natural tendencies will provide the greatest satisfaction and effectiveness.

The ‘**Work Style Chart**’ should be mentioned.

- See if you can find any trends.
- Discuss that if the lines are nearly even, this would indicate they can handle many different types of tasks and management duties.
- If there is a low work style, it should be mentioned that we should look for franchises that balance this out and help them maximize their talents in the (name their high work style).
- To help with your explanation, look at the summary on the right side of the page.

Competencies

- Discuss any competency that is extremely high or extremely low.
- 8 or higher shows a very high level of competency.
- Most people don’t score an 8 or higher.
- Tell the candidate that you want to select franchises that help balance out low competencies.
- If you notice any inconsistencies or conflicting traits, they make good discussion points with your candidates.

Sales & Business

1. Discuss the Sales Orientation.
2. 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. This can either be a resale or a massive brand.
 - **When you see “Single Unit”...**
 - It is more likely that they will test it out before moving on to additional locations.
 - **When you see ‘Multi-Unit’...**
 - Be sure to mention that the candidate can manage multiple units.
 - **When you see ‘Regional Developer’...**
 - Tell the candidate that this is rare. This is a particular type of leadership that rates Regional Developers. These results display the candidate’s ability and skills that qualify them to lead in a geographic market.

Needs & Wants

- How would you describe their needs and wants?
 - There are two major components to franchising success: Compatibility and Complementary.
- Their business considerations are illustrated in the lists.

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 Candidate Pushes Back About The Questioning

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

The following are some examples of scripts:

- “I understand that this is a lot of questions. Do you know why we ask them?”
- “This is a big investment and a complicated one. Because of this, it is of extreme importance to me that everything is done correctly.”
- “Although I am just getting to know you, I have to be aware of what you are trying to accomplish.”
- “Many times, making a decision will come down to weeding out what doesn't work first and then finding out what works better.”
- “I am investing in you upfront because my objective is a long-term partnership. It is my desire to ensure your success both in the franchise award process and as a franchisee.”
- “This means that I'm not going away. I'm staying with you throughout this process. I am giving you the real story while providing high-level work for you.”

Planned Advance

1. Next, explain what happens
2. Ensure you have their correct zip code
3. The presentation meeting should be scheduled
4. Funding introduction, (*if necessary*)

The following are some examples of scripts:

- “At our next meeting, I will show you potential Franchises based on what we discussed. I will need a few days to do some research to ensure it is available in your territory, analyze the business models to ensure they are a good match and prepare a presentation for you.”
- “I will be giving you some pointers on what to look for in a franchise. My goal is to help you identify the weak spots and strengths of the franchises.”
- “I must inform you that you will be able to access the best franchises by being approved for all of the ones we are researching. Who I present to franchises affects my reputation.”

A Brokers' Action Plan and Follow Up

- Add the candidate's call information to the Candidate Management System
- Keep in mind the 6 Questions Goal; what every candidate wants to know the answer to!
 1. How much will it cost?
 2. How much money can I make?
 3. How quickly can I make it?
 4. What are other people saying about it?
 5. How will I be supported?
 6. Can I see myself doing this?