



Franchise Brokers Association

SpotOn!® Profile

Lorena Maria

Postal Code: 92683

Date: August 11, 2022

Age: 31

Marital Status: Married

Income: \$150,000 to \$360,000

Education: Masters Degree

Recent Employment: Ata Health Care

Position: RN

Average Years on Job: 8-12 years

Homeowner? No

Ever owned a business? No

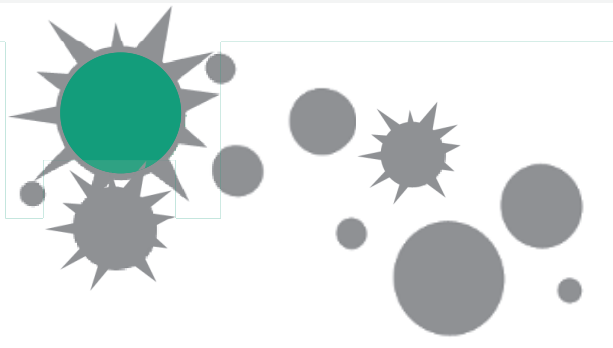
Total Capital to Invest: \$50,000 to \$100,000

Number of Dependents: 0

Veteran: No



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Values: Societal

*Growth
Knowledge
Challenge*

Work Style: Thinker

Pace

Slower-Systematic

Priority

Task

Seeks

Accuracy, Precision

Strengths

Plan, Systematize, Orchestrate

Workplace

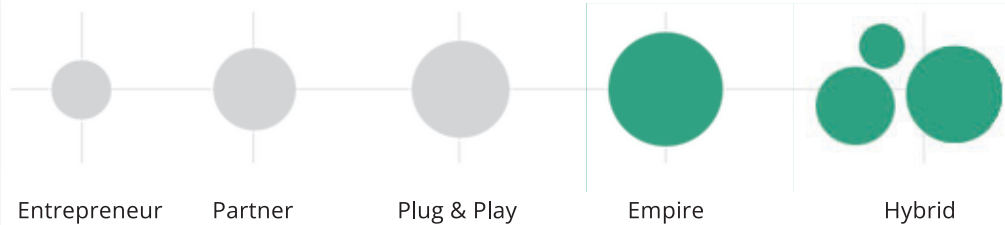
Formal, Functional, Structured

Culture: Create

*Flexibility
Rivalry*



Stages of Growth



Lorena

Admin & Customer Service



R&D & Technical



Marketing & Public Relations



Human Resources & Training



Sales & Business

Sales Orientation

Consultative

Sales Potential

Low

Business Path

Consultant

Single-Unit

Compliance

High

VALUES

What are Values?

Values determine what about the self is the meaningful core that governs people's desires and the expression of these desires. Motives are the psychological drivers of behavior. Motives are the only true predictors of behavior. It's one's values which dictate his or her motivations. There are four Value Sets.

Values Hierarchy

- 1) Growth
- 2) Knowledge
- 3) Challenge
- 4) Impact
- 5) Innovation
- 6) Security
- 7) Satisfaction



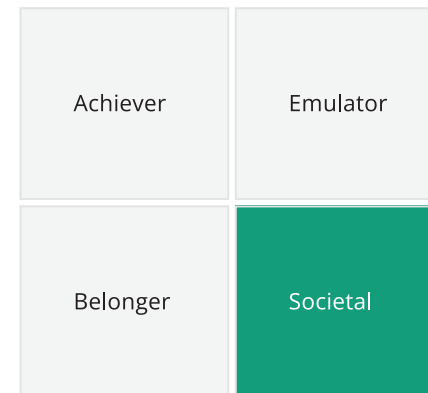
Lorena Maria is a Societal

Scores indicate Lorena Maria is a Societal. She is an intelligent and visionary business builder who wants to inspire and influence positive change in the world. Societals are motivated to have an impact on others using their expertise, experience and education. Contribution and freedom defines success for the Societal. They prefer innovative, change, or cause-based concepts that promote others' growth and success.

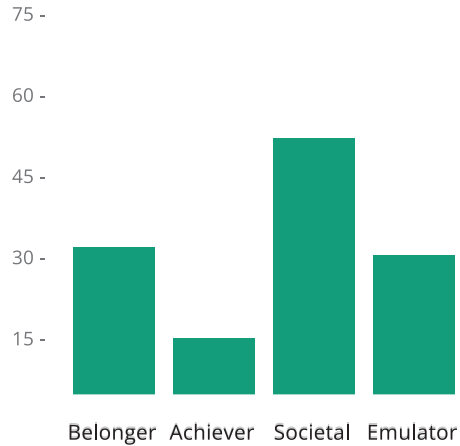
Lorena Maria is a:

Societal

Power - Self - Passion



Principle - Others - Purpose



Societal

Societals tend to be well educated and actively seek out information. They are reflective, creative, purpose-driven and relentless in pursuing and sharing ideals. They are change leaders and are receptive to new ideas and technologies. Societals are among the established and emerging leaders in business, yet they continue to seek challenges. They are mature, satisfied and reflective people who value simplicity, knowledge, justice and responsibility.

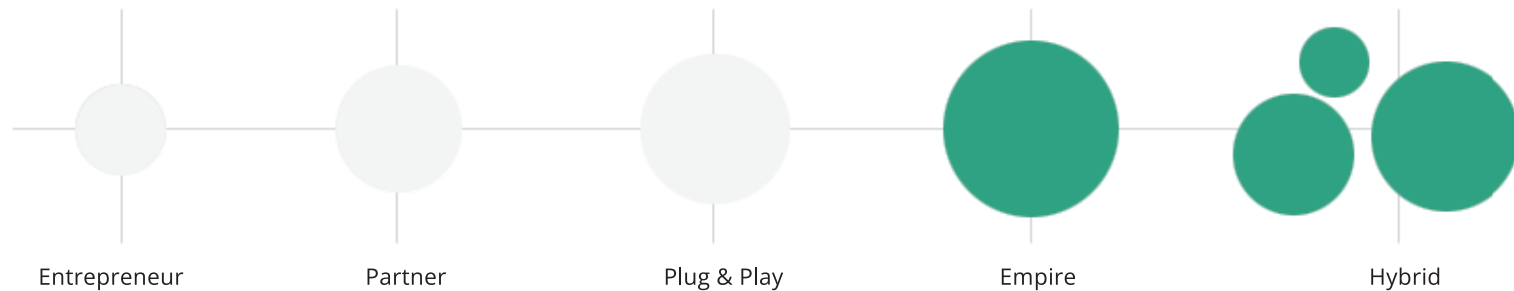
It is not unusual to see a Societal acting as an advocate for those they believe need protection, counsel or direction. Lorena Maria is honourable, dependable and consistent in word and deed; her reputation and credibility is meticulously safeguarded.

Like many Societals, she is a knowledgeable and dedicated advisor and mentor who enjoys being involved in policy, procedures and politics. Highly principled, purpose-driven, a history of achievement and an insatiable desire to make a difference describes Lorena Maria.



STAGES OF GROWTH

Lorena Maria's Stage of Growth



Stages of Growth: Stage 4: Empire / Stage 5: Hybrid

Stages of Growth are determined by a company's managerial style, organizational structure, formal systems, major strategic goals and founder/owner involvement. As a franchise organization grows, the systems and procedures will adapt to support an evolving business model, the needs of the franchisees and to satisfy end-user demands. Within each phase of business a franchisee's skills and goals need to complement a franchisor's plans and market expansion strategies. There are 5 Stages of Growth.

Entrepreneur	Partner	Plug & Play	Empire	Hybrid
Evolving and dynamic Product-oriented First to market, Better terms and territories, Fewer rules, Say in policies, Financial rewards	Collaborative and growing System-oriented Market awareness, Complementary skills sets, Best practices, Desirable markets available	Systematic and replicable Franchisee oriented Faster ramp-up, Resales, Proven, replicable systems, Advisory boards, Buyer co- ops	Bureaucratic, top-of-mind Market share oriented Brand equity, Strong Financials and support, Merger and acquisition potential	Intrapreneurial, renewing Innovation oriented Well-defined products, Flexible systems, First to market, Leveragability of resources

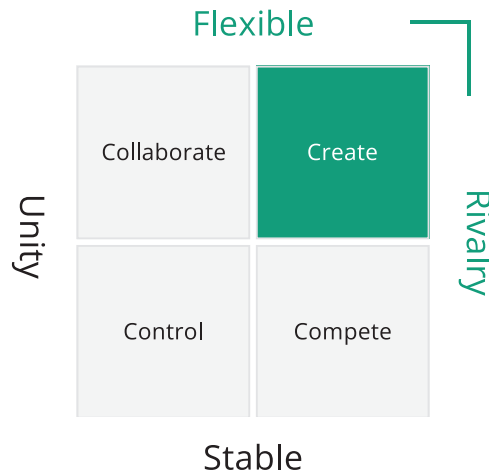
CULTURE

What is a Business Culture?

Culture is a complex issue that essentially includes all of a group's shared values, attitudes, beliefs, and behaviors. Culture is broad – encompassing all aspects of a group's internal and external relationships – and culture is deep in that it guides individual actions even to the extent that members are not aware they are influenced by it. There are four Cultural Types.

Lorena
Maria's
Cultural Fit is
Similar to

NETFLIX



Lorena Maria fits well in a "CREATE" culture

A dynamic, entrepreneurial, and creative place to work. Innovation and risk-taking are embraced by employees, leaders and franchisees. A commitment to experimentation and thinking differently are what unify the organization. They strive to be on the leading edge. The long-term emphasis is on growth and acquiring new resources.

Success means gaining unique and new products or services. Being an industry leader is important. Individual initiative and freedom are encouraged. Their ability to quickly develop new services and capture market share makes them leaders and differentiates them in the marketplace and forces less agile competition to play catch-up.

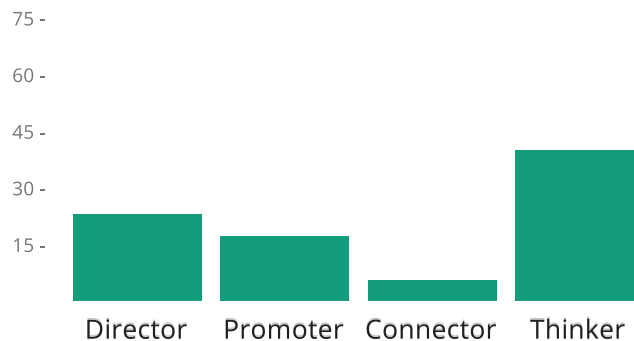
WORK STYLE

What is Work Style?

For greatest satisfaction and effectiveness, one should seek a work or business environment consistent with their natural tendencies. Work Style is particularly important for the business owner as they will set the pace and direction for employees, partners, vendors and clients. There are four Work Styles.

Lorena Maria is a Thinker

Scores indicate Lorena Maria is a Thinker. People in this group are analytical, persistent, systematic, and excellent problem solvers. Thinkers tend to be detail-oriented, which makes them more concerned with content than style. They are task-oriented individuals who enjoy perfecting processes and working toward tangible results. They are almost always in control of their emotions.



Lorena Maria

Pace:
Slower-Systematic

Priority:
Task

Seeks:
Accuracy, Precision

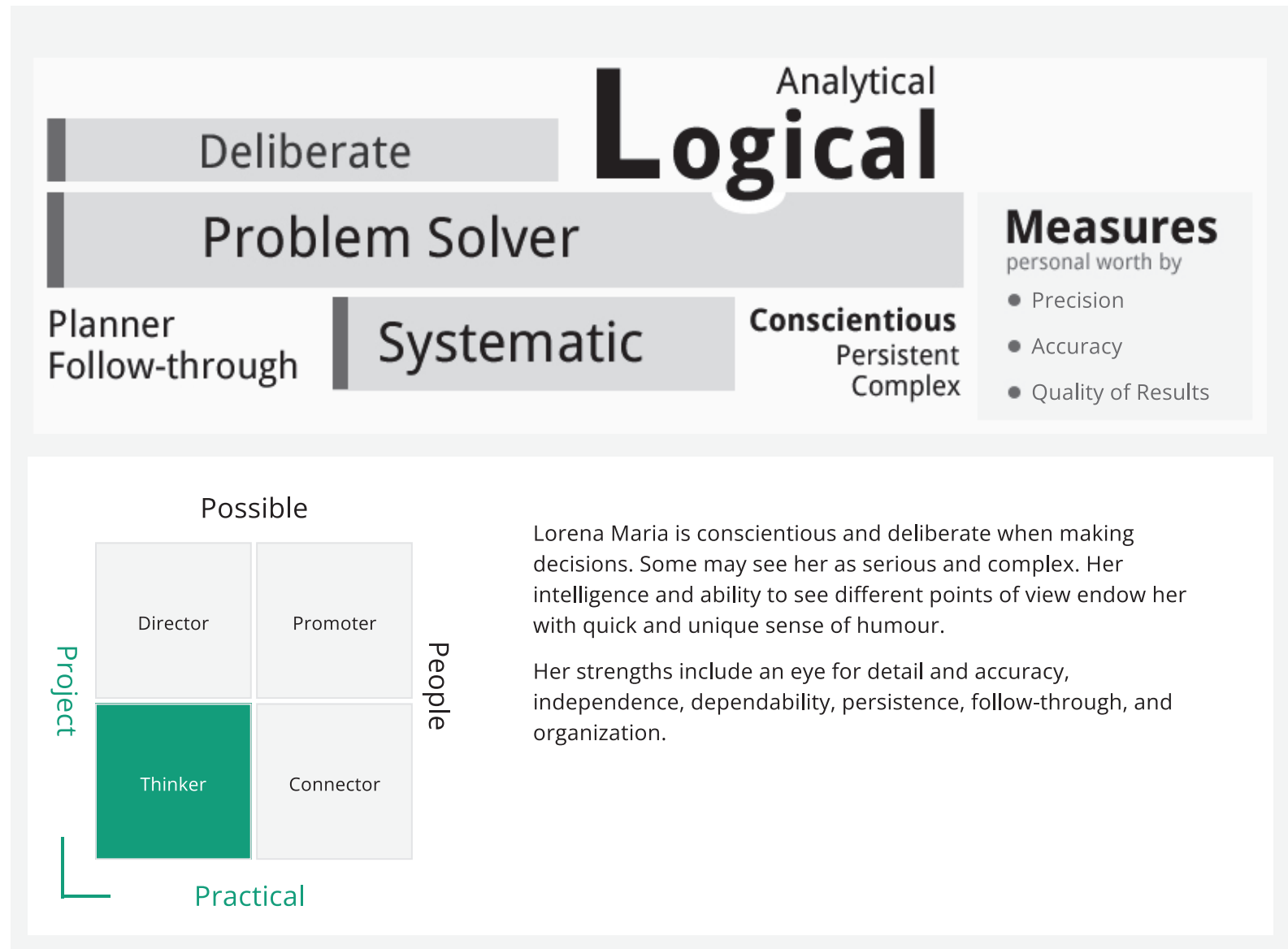
Strengths:
Plan, Systematize, Orchestrate

Under Stress May Become:
Withdrawn, Headstrong

Workplace:
Formal, Functional, Structured

Disorganization
drives Lorena Maria
nuts.
It's A-Z, folks. How
tough can it be?



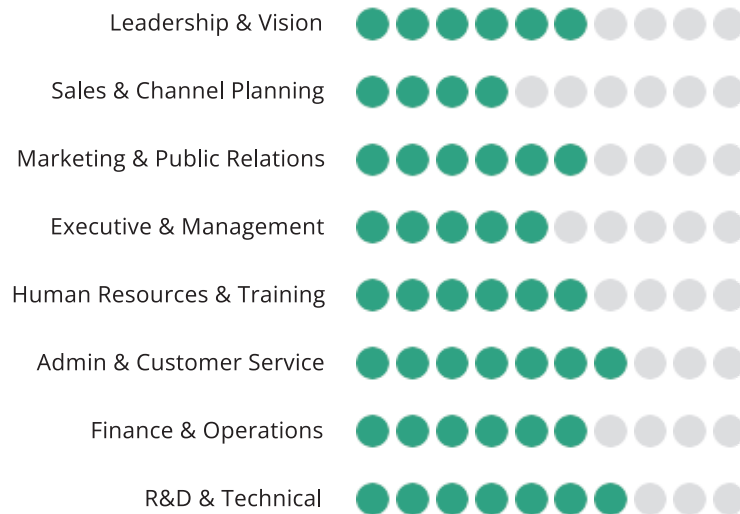


COMPETENCIES

The Eight Competencies in Business

Understanding one's Business Competencies is important. More important however, is how those Business Competencies complement those of a franchise system and its growth strategy.

Lorena Maria's Competency Scores



Lorena Maria's profile pattern is similar to:

Jonah Peretti



Why

- They share Values
- They share Competencies
- They both thrive in a Create business culture
- They are both Purpose driven

Motto:

"Collecting Appreciating Assets"

SALES & BUSINESS

Development

All businesses require some form of sales.

There are 3 primary types of sales and naturally there are individuals that are suited for one over another. There are many ways to success, for some it comes from climbing the corporate ladder for others it's building a multi-unit franchise business. Lorena Maria's sales orientation and potential business path is marked below.

Sales Orientation

✓ Consultative

Relational

Competitive

Lorena Maria fits well within a business where the sales are of a consultative, solution-based nature. She is able to build high trust and high credibility relationships with her prospects. She is good at understanding her customer's business environment, critical business drivers, and high priority business initiatives and then crafting a solution to help the customer achieve their objectives. The consultative sale can at times be a complex, long term process involving collaboration of both the buyer and the seller. Lorena Maria is able to lay a solid foundation as an expert or consultant for future sales with this prospect.

Potential Business Path

Corporate

Corporate ladder climber

Consultant/Contractor

Consultant, contractor or subject matter expert



Entrepreneur

Starts and builds a business from scratch

Single-Unit Franchisee

Appreciates and exploits systems



Multi-Unit Franchisee

Replicates systems and manages locations

Area Developer

Appoints sub-franchisees and/or manages outlets

NEEDS & WANTS

In a Franchise Business

Remember...

Success in franchising entails two major factors: Compatibility and Complementary Competencies between franchisee and franchise company. Fit Matters — especially in business! Based on Lorena Maria's profile listed here are some business considerations.

- ✓ Purpose driven concepts
- ✓ Collaborative, solution based environments
- ✓ Business which builds community
- ✓ Inspirational, educational or transformational
- ✓ Ability to engage influential network
- ✓ Few highly skilled employees or partners
- ✓ May be an investor or absentee owner
- ✓ Diversity of clients and projects
- ✓ Desire to impact policy and procedure
- ✓ Company that appreciates innovation and creativity
- ✓ Simple business; easy to replicate
- ✓ Change or impact-based products and services
- ✓ Hands-off approach by head office
- ✓ Must leave a legacy
- ✓ Cultured, refined and deliberate business model
- ✓ Organization with impeccable principles

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META PROGRAMS

Lorena Maria's Mental Filters

Comfort Zone

Lorena Maria has a large comfort zone.

No urgency here. They will linger until details, system and future make sense and they see that the business provides purpose. Slow down. Provide documentation and statistics.



LARGE

Motivate by: Using Carrot & Stick

- Future pacing where pleasure is greater and/or pain is more intense.
- Pay particular attention to the Splatter Dots.
- Leverage highest values including: Growth, Knowledge and Challenge.
- Safety comes from: Not Being Manipulated, Gaining Knowledge and Making a Contribution.

Decision Making: Procedural

- Efficient; one to three options
- Criteria, processes or checklists
- Doing the process right important
- Which one is the best?

Relate: Difference with Exception

- Will search for what is unique or different
- Might see some similarities
- Has high capacity for change

Frame of Reference: External

- Decisions based on concrete facts and evidence
- Stressed when there is a lack of feedback
- Needs feedback to make progress
- Indecisive if there is a lack of feedback