Steps	One **Initial Call Attempt**	Two **Candidate Research Call**	Three **Research & Review Prep**	Four **Presentation & Review**	Five **Intro to Zor**	Six **Franchise Due Diligence**	Seven **FDD & Legal Review**	Eight **Validation- FSO**	Nine **Discovery Day & Award**	Ten **Closed Won**
Prep		Learn about your Candidate			Prep Candidate with presentation skills		Review the FDD summary.			CELEBRATE!
Objectives	**Send to Funding as soon as they seek information on it. Must be discussed by Step Five.**					**Manage candidate's fear and nerves throughout these steps.**				
	Qualify The Candidate Demonstrate Broker Value	Understand candidate's profile and desires Set candidate expectations on their options and markets	Identify Desirable Concepts Prep presentations for chosen concepts	Create Interest and Engagement with presented Concepts Get Candidate to commit to calls with at least two franchisors	Set expectations with both parties & confirm plans. Have candidate commit to 2nd Call with Franchisor	Educate candidate on effective research skills. Manage both parties' opinions and outlook of the other.	Confirm candidate understands FDD Discuss value of retaining attorney or having them review FDD	Reaffirm Candidate's franchise choice Keep parties mutually engaged and in touch	Candidate travels to formally meet franchisor Franchisor may seek candidate's verbal agreement	Leave candidate with positive outlook about their experience. Make sure all parties feel their contribution was acknowledged
Actions	Ask Qualifying Questions If qualified, schedule Candidate Research Confirm next meetings and send emails.	Review SpotOn! Results Discuss Wants, Needs, Location Discuss Competencies Schedule next meeting, 4-6 days.	Search FLS & Send TCs to compatible concepts Collect Info Packet, Comparisons, etc. Tailor presentation to candidate profile Confirm next meeting and send emails.	Present the brands: Note candidate's impressions. Send Formal Reg & supporting materials to candidate's selections. Schedule meetings with the franchisors, and send necessary emails.	Ensure meeting plans are aligned and no-one falls out of contact	Discuss with both parties: Leadership, Communication, & Strategy	Discuss candidate questions about FDD & have franchisor answer. Prep candidate to handle FDD call alone Discuss Attorneys and prep for any introduction.	Prep candidate with questions and revealing topics for validation . Prepare candidate to handle varied feedback from franchisees Ensure client receives validation list	Seek immediate broker feedback after discovery day by phone or email.	Facilitate handoff: Check Business Account, Entity Formation, Funding Invoice the franchisor Won Deal on Leaderboard.
Timing	**Send educational emails and check-ins between meetings. Brokers should reach out to candidates at least weekly.**									
BOS Actions	**Move Deal to next stage as soon as its current stage is completed.**									
	Set Lead Result, move deal & push contact to FBAmembers.com.	Keep call notes in Hubspot for centralized reference			Edit Deal Title: Add Franchisors' Names.					Add commission amount to deal
BOS Resources	**Enroll candidates in a relevant sequence after each step to lighten the load of manual outreach.**									
	Sequence: PZEE-Zorakle-Process-After 1st Call	Sequence: PZEE-Research-Process-After the Zorakle	Sequence: PZEE - Funding- Education - How do you fund a franchise?	PZEE- Intro to Zor - Process	PZEE- Due Diligence-Prep Education	PZEE- Validation-Prep Education PZEE-Validation-Exec Interview	PZEE- Attorney Review	Discovery Day - Prep Education - 2	PZEE- Won - Prep Education	
Universal Resources	KB: Qualifying A Candidate	KB: What Is Zorakle?	KB: Funding Overview KB: FLS Overview KB: Territory Checks	KB: Sending Formal Registrations	KB: FTI Meeting Scheduling Tips	KB: Moderating discussions between parties	How to read an FDD by Eric Riess, Aspen Legal KB: Presenting an FDD Summary	KB: Validation Techniques and Questions for Your Candidates KB: Managing Fear	KB: When will I know my deal is Won?	KB: My Deal is Won-What Now?
Tasks for Delays or Ineligibility	If candidate is unreachable: Leave VM, email & reschedule. Follow Phone Process Chart if ongoing. BOS: Add unqualified to drip campaign to keep engaged		**A candidate that rejects franchisors always returns to Step 3** **Candidates that fall off for other reasons are coded accordingly:** Life Event: No Longer Qualified Gone Dark: send nurture emails, BOS can add to Sequence: On Hold: Schedule Meeting to Resume							