



Step 1 — The Initial Call

BROKERING SALES PROCESS — 10 STEPS ROADMAP

LESSON PURPOSE

The Initial Call forms the foundation of the entire franchise brokering sales process. It determines whether a lead is qualified, builds credibility, and sets the correct expectations for moving forward. **Training Objective:** Learn how to prepare for, conduct, and follow up after an initial call to qualify candidates effectively and guide them to Step 2: SpotOn/Candidate Research.

1. UNDERSTANDING THE CALL**CORE POINTS**

- This is where trust and credibility begin
- Understanding candidate's motivation and readiness is essential
- Set appropriate expectations for long-term engagement

Reflection: Why is the Initial Call the most critical stage of the process?

2. PREPARING FOR SUCCESS**PREPARATION CHECKLIST**

- ☐ Review lead info (name, city, state, zip, capital)
- ☐ Research professional background (LinkedIn, web)
- ☐ Prepare SPIN questions (workbook page 7)
- ☐ Open CRM/BOS for notes
- ☐ Review Playbook: Step 1 - Initial Call

QUALIFICATION STANDARDS

- ☐ Ready in 6 months (Mindset)
- ☐ \$50,000+ liquid capital (Money)
- ☐ Motivation or pain is clearly identified

3. CONDUCTING THE CALL**BEST PRACTICES**

- Ask permission before continuing
- Lead with curiosity, not pitch
- Listen carefully and document
- Keep the tone conversational

SAMPLE OPENER

"You requested franchise information. I'm following up to understand your goals and see how I can best assist. May I ask you a few questions?"

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4. PRESENTING YOUR VALUE**BROKER VALUE STATEMENT**

"I've been in franchising for ____ years. From that experience, I learned _____. Today, my role is to help candidates like you navigate the process with clarity and confidence."

TIPS FOR A STRONG STATEMENT

- ☐ Ask permission before sharing
- ☐ Highlight expertise, not sales goals
- ☐ Emphasize partnerships with CPAs, lawyers, funding experts

5. QUALIFICATION & TRANSITION**CONFIRM CANDIDATE FIT**

- ☐ Ready timeline: _____
- ☐ Capital verified: _____
- ☐ Motivation/pain: _____
- ☐ Qualified ☐ Yes ☐ No

IF QUALIFIED

- ☐ Schedule next meeting (24-48 hours)
- ☐ Send SpotOn Assessment link
- ☐ Update CRM to "SpotOn/Candidate Research"

6. FOLLOW-UP & DOCUMENTATION**CRM/BOS CHECKLIST**

- ☐ Enter call notes
- ☐ Set follow-up tasks
- ☐ Email SpotOn link and meeting invite
- ☐ Schedule funding education if relevant

Reflect: Which step of your call flow needs the most improvement?

7. MINI KNOWLEDGE CHECK

1. What is the main goal of the initial call?
2. Name two essential qualification criteria.
3. Why is obtaining consent before continuing important?
4. Complete: "My role as a broker is to..."

EXPLAINING YOUR PROCESS

"We follow a research process that I will describe so you can understand how it works."

"We will talk a couple of times to define what your ideal business will look like."

SETTING NEXT STEPS

- ☐ Explain the next steps
- ☐ Send the SpotOn Assessment
- ☐ Schedule the next call (24-48 hours)
- ☐ Remind candidate to complete assessment first

POST-CALL FOLLOW-UP

- ☐ Notes captured in BOS/CRM
- ☐ Next tasks/meeting set in BOS/CRM
- ☐ Calendar invite sent with call-in details
- ☐ SpotOn link included in follow-up email
- ☐ Deal moved from Connected to SpotOn/Research

8. SUPPORTING RESOURCES

- Franchise Selection Roadmap
- SpotOn Assessment Overview
- Recorded Call Samples
- BOS Playbook: Step 1 - Initial Call