



Step 2 — SpotOn / Candidate Research

BROKERING SALES PROCESS — 10 STEPS ROADMAP

LESSON PURPOSE

This step focuses on guiding the candidate through the next stage of discovery by reviewing their SpotOn Assessment and gathering critical information for tailored franchise matching. You will learn how to interpret key findings, uncover motivations, and record meaningful candidate insights. **Training Objective:** Understand how to prepare, conduct, and document the SpotOn and Candidate Research conversation to ensure the right franchise fit and progression to Step 3: Franchise Presentation.

Prerequisites: What You Need to Know to Be a Successful Franchise Broker • SPIN Selling Principles • Step 1: Initial Call • Step 1.2: Funding

1. THE CANDIDATE RESEARCH CALL

This second discovery call deepens rapport and uncovers goals, values, and business preferences through assessment results. Use video/screen sharing when possible to observe reactions.

PREPARATION CHECKLIST

- ☐ Candidate has completed the SpotOn Assessment
- ☐ Key insights highlighted for discussion
- ☐ SPIN questions customized to candidate's situation
- ☐ BOS/CRM open for note-taking

Tip: If the assessment has not been completed, reschedule the call unless the candidate will be a non-operator owner.

2. CONDUCTING THE CALL

QUICK CHECK-IN

"Before we proceed, has anything changed since our last conversation?" "Do you have any new thoughts or questions since we last spoke?"

GO INTO PAIN — SPIN QUESTIONS

"I was reflecting on something you mentioned earlier about [pain point]. Can you tell me more about how that's impacting your business goals?"

SPOTON REVIEW — SAMPLE OPENER

"I appreciate you completing the assessment. Let's go through it together to see how it aligns with your goals and experience."

3. REVIEWING THE SPOTON SUMMARY

Focus on major metrics and feedback. Ask: "Does this feel accurate?" "Is there anything that doesn't resonate?"

KEY REVIEW AREAS

- **Values** — #1 indicator of fit; discuss top two values and "splatter dots" (change points)
- **Work Style** — Pace and Workplace tendencies
- **Competencies** — Highlight strengths (8+ = standout)
- **Sales Orientation** — Best-fit roles/environments

Tip: This is not about "selling." Stay consultative — explore motivations and lifestyle goals.

4. UNDERSTANDING SPOTON PROFILES

Personalize discussion and identify resonant business types:

PROFILE	DESCRIPTION
Belonger	Values stability, family, dependable systems. Prefers proven models.
Emulator	Independent, risk-tolerant, goal-driven. Seeks quick, profitable growth.
Achiever	Ambitious, results-oriented, thrives on performance-based goals.
Societal	Purpose-driven leader motivated by impact and helping others succeed.

5. ADDITIONAL FIT CONSIDERATIONS

STAGES OF GROWTH

- Entrepreneur (1–19 units)
- Partner (20–99 units)
- Plug & Play (100–499 units)
- Empire (500–999 units)
- Hybrid (1,000+ units; restructuring/rebranding)

CULTURE & ENVIRONMENT FIT

Discuss preferred cultural style and pace to shape ideal matches.

COMPETENCIES & BUSINESS PATH

Review Single Unit, Multi-Unit, and Regional Developer paths against investment readiness.

6. HANDLING CANDIDATE PUSHBACK

If the candidate is uncomfortable with detailed questioning, reassure them:

"These questions help us better understand what will make you successful."

"We ask this so we can match you accurately to franchises that fit your vision."

"Our goal is to simplify your path to ownership by finding a true fit."

7. EXPLAINING THE NEXT STEPS

Before ending the call:

- Confirm the candidate's target ZIP for research
- Schedule the presentation meeting in 5–7 days
- Introduce funding options if applicable

SCRIPT EXAMPLE

"With your SpotOn insights, I can now match your profile with top-performing franchise concepts. In our next meeting, I'll present options that align with your skills, values, and target market."

8. FOLLOW-UP & DOCUMENTATION

CRM/BOS CHECKLIST

- ☐ Capture notes from the call
- ☐ Update candidate profile and pipeline stage → "Research Step"
- ☐ Schedule next call (within 5–7 days)
- ☐ Send meeting invite and confirmation message
- ☐ Maintain candidate momentum through personalized follow-up

Reflect: What did you learn about this candidate's motivations that will help in Step 3?

9. MINI KNOWLEDGE CHECK

1. What is the main purpose of the Candidate Research call?
2. Why are "Values" the strongest predictor of franchise fit?
3. Name one difference between a Belonger and an Achiever profile.
4. What should you do if the candidate hasn't completed their assessment?

KEEP IN MIND — THE 6 QUESTIONS EVERY CANDIDATE WANTS ANSWERED

- ? How much will it cost?
- ? How much money can I make?
- ? How quickly can I make it?
- ? What are other people saying about it?
- ? How will I be supported?
- ? Can I see myself doing this?

10. RESOURCES

- SpotOn Assessment Review Guide
- Zorakle Training Reference
- Candidate Research Questionnaire Template
- BOS/CRM Note Best Practices