Franchise Training Institute

Step 1 — The Initial Call

BROKERING SALES PROCESS WORKBOOK — 10 STEPS ROADMAP

Franchise Brokers Association
Orlando, FL

WORKBOOK EDITION

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 Initial Call

CORE POINTS

- This is where trust and credibility begin.
- Understanding the candidate's motivation and readiness is essential.
- Set appropriate expectations that lead to 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

✎ NOTES

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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?"

SPIN FOCUS

S – Situation | **P – Problem** | **I – Implication** | **N – Need Payoff**

✎ CALL NOTES

4 Presenting Your Value

YOUR 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 VALUE STATEMENT

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

Reflection: What makes your approach valuable to candidates?

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"

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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

Reflection: 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 this: "My role as a broker is to..."

8 Supporting Resources

REFERENCE MATERIALS

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

Next: Step 2 — SpotOn/Candidate Research →