



Step 2 — SpotOn / Candidate Research

WORKBOOK EDITION

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. **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

PURPOSE

This second discovery call deepens rapport and uncovers goals, values, and business preferences through assessment results.

PREPARATION CHECKLIST

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

Reflection: What must be true before you proceed with this call?

2 Conducting the Call

QUICK CHECK-IN

"Before we proceed, has anything changed since our last conversation?"

GO INTO PAIN — SPIN

"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 OPENER

"I appreciate you completing the assessment. Let's go through it together."

CALL NOTES



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3 Reviewing SpotOn Summary

KEY REVIEW AREAS

- **Values** — #1 indicator of fit.
- **Work Style** — Pace and Workplace.
- **Competencies** — Highlight strengths (8+).
- **Sales Orientation** — Best-fit roles.

SPOTON HIGHLIGHTS

4 Understanding SpotOn Profiles

PROFILE	DESCRIPTION
Belonger	Stability, family, dependable systems.
Emulator	Independent, risk-tolerant, growth-driven.
Achiever	Ambitious, results-oriented.
Societal	Purpose-driven, impact-motivated.

Reflection: Which profile best matches your candidate and why?

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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)

IDEAL STAGE FOR THIS CANDIDATE

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6 Handling Candidate Pushback

"These questions help us better understand what will make you successful." "Our goal is to simplify your path to ownership by finding a true fit."

OBJECTIONS & RESPONSES

7 Explaining Next Steps

- Confirm target ZIP for research.
- Schedule presentation meeting in 5-7 days.
- Introduce funding options if applicable.

"With your SpotOn insights, I can now match your profile with top-performing franchise concepts."



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8 Follow-Up & Documentation

CRM/BOS CHECKLIST

- ☐ Capture notes from the call.
- ☐ Update pipeline stage → "Research Step".
- ☐ Schedule next call (within 5-7 days).
- ☐ Send meeting invite and confirmation.

9 Mini Knowledge Check

1. What is the purpose of the Candidate Research call?

2. Why are "Values" the strongest predictor of fit?

3. Difference between Belonger and Achiever?

4. What if candidate hasn't completed assessment?

10 Key Candidate Questions

SIX QUESTIONS EVERY CANDIDATE WANTS ANSWERED

- | | | |
|---------------------------|----------------------------|--------------------------------|
| ? How much will it cost? | ? How much can I make? | ? How quickly can I make it? |
| ? What are others saying? | ? How will I be supported? | ? Can I see myself doing this? |

11 Supporting Resources

REFERENCE MATERIALS

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