



176 Tips for Improving Franchise Communications and Group Meetings

Drawn from Roundtable Discussions in the 2017 Franchise Relations Summit

Edited by **Greg Nathan**, Franchise Relationships Institute and **Steve Rafsky**, Padgett Business Services

These best practice tips are based on notes collected from facilitated Roundtable discussions in the 2017 Franchise Relations Summit.

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Mitch Cohen, CEO, Management 360, LLC (Jersey Mikes Subs Franchisee) & IFA Franchise Relations Committee Chairman

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How to actively involve franchisees in contributing to meetings and conventions

Thanks to table facilitator: Matt Kunz

1. Ask all the people attending to share their experience on specific topics, for instance in round tables.
2. If something is working well for a franchisee, reach out to them to present a case study on it.
3. Seek out new talent to lead round tables and share success stories.
4. Involve a balance of seasoned and new franchisees in tasks and activities – everyone will have something to contribute to the meetings, even if this is helping with organisational tasks.
5. Run monthly calls leading up to convention so you can listen to recent successes and concerns, and build your program so it touches on these issues.
6. Think of ways to get franchisees engaged before the convention, such as having people prepare for panels and to lead round tables.
7. Adjust the franchise agreement so it requires attendance at annual conventions.
8. Provide an incentive for attending – the larger the franchise, the more money to the franchisee.
9. Use your top franchisee to share their best practices.
10. Build a draft agenda well in advance; then send out options to franchisees in survey format and let them vote on topics and speakers.
11. Awards events, such “black tie” awards dinners at the end, are popular with franchisees.
12. Don’t give out trophies and awards to everyone. Have the top 30% of franchisees receive awards in different categories.
13. Create a variety of award categories – some more to do with attitudes or constructive participation, and others more to do with metrics.
14. Include a franchisor executive panel where they respond to questions sent in prior to the meeting.
15. Hold an exclusive VIP dinner for the top performers, e.g. to top 5%.
16. Involve attendees in community charities or giving back functions, e.g. bringing supplies for a local homeless shelter.
17. Maintain a healthy balance between fun and business.
18. For large groups, instead of one huge annual convention, try regional conventions and hold one large event every 5-years.
19. Consider the length. Three days is usually a good length so as not lose attention.



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How to ensure franchisees are not bombarded with information, so they read what they are sent

Thanks to table facilitator: Stacy Swift

20. Try using video updates and keep these under 2 minutes.
21. Use “gamification” to encourage involvement with the content, especially on mobile devices.
22. Use hidden messages in the communication that offer money or gift cards for those who click on specific links or read specific sections.
23. Have a section that summarizes action items or new Information so they know immediately what they need to read if they are pushed for time.
24. Have a central communications person that coordinates and edits departmental information into one document and only send this out once a week.
25. Ensure all information is screened using rules such as – Is this really relevant and useful to franchisees? Will it help them to run a better business? Is it written in a clear and interesting way? Is it as short as it can be?
26. Train franchisor staff in journalistic writing skills so they write in an interesting way.
27. Measure the read rates of emails and online message, and set targets and benchmarks for these. If benchmarks are not being met find out the reasons why.
28. Get field staff to include discussions with franchisees on their routine or method of reading Support office information.

How to keep online franchisee forums and portals useful and constructive

Thanks to table facilitator: Bruce Bloom

29. Clarify why you’re starting a franchisee forum. Have a clear purpose or mission.
30. Have guidelines for posting etiquette and train everyone in these.
31. Have the FAC involved in leading discussion topics.
32. Have someone charged with monitoring forums and coaching people who don’t follow protocols.
33. Reward positive behaviors and people who contribute constructively to the forums, e.g. have an award at your Gala for this category.

How to use FACs task forces and project teams to get franchisee input on important initiatives

Thanks to table facilitators: Tamra Kennedy and Rissy Sutherland

34. For larger networks split groups into geographic regions.
35. Demographic based in area that needs attention.
36. Include people that have experience or expertise in relevant areas as franchisees will lose interest if the discussions or outcomes are weak.
37. Use a standard agenda format for meetings so there is organization and discipline. Stick to the agenda and avoid topics not on the agenda.
38. Recognize that longer tenure and new franchisees have different needs and will be able to contribute in different ways.
39. Ensure there are avenues for everyone to be heard and have their say.
40. Use different communication processes to ensure the message is being heard.
41. It is essential to have meeting guidelines or rules of conduct so meetings stay constructive, e.g. be courteous and respectful, listen with an open mind, be on time, read materials before for the meetings, keep comments focused and succinct, etc.
42. Be clear on the powers of the group and be careful not to allow franchisees to believe they are in charge of running the organization. Ensure franchisor and franchisee expectations are aligned.
43. Set up task forces and product teams to address specific business issues.
44. Have term limits on FAC participants so people don't become institutionalized.
45. Take action minutes on what is decided, check these as you go with participants for clarity, and distribute them to the relevant people as soon as possible after the meeting.

How to ensure online or phone coaching calls and meetings are useful

Thanks to table facilitators: Sandra Kitchen and Azim Saju

46. Give the meetings a title or brand to encourage a sense of pride and identity.
47. Call franchisees monthly. Hold them accountable not so much for results, but more for their actions. Some may like this more than others.
48. Set up small mentoring groups of around 5 people. Have them practice skills with you using the webcam. Less talk and more action will engage them more.
49. Use field consultants for setting topics and recruiting attendees.
50. Let the group decide the when and how of the meeting.
51. Have a bootcamp program that runs over a 5-week program with a one hour meeting each day. Have franchisees sign up and commit to the program.
52. Respect the franchisees' time and always ensure there's a valid business reason for every call to avoid "death by meetings!"
53. Have the coach or facilitator compile a list of points to go through in the meetings. Ensure there is a relevant, clearly-defined agenda that is set out in advance.
54. Have a structured onboarding program for first 6 months to focus on business planning and to ensure franchisees are on task and on target.
55. Have a Code and Values meeting to discuss which Code or Value people are working on and which they are having trouble with.
56. Use peer advisory groups to help ensure people are achieving traction with their plans.
57. Ask a lot of questions, and allow people to talk opening and vent.
58. Ensure people know how to use the technology, such as the mute button and cameras, to maximize involvement and minimize distraction. The technology should fit the group's needs.
59. Find where their struggle is and what is holding them back from meeting their goals.
60. Ensure everyone is equally involved and engaged in the calls. Listen carefully and get them to contribute their thoughts.

How to ensure field visits are efficient and useful

Thanks to table facilitator: **Chuck Stempler**

61. Try using specialized consultants who focus on a particular area.
62. Have one specific person allocated for a region so they can get things done efficiently.
63. Keep notes of sites visits, especially commitments that are made to complete specific actions.
64. Follow up with franchisees after visits and ensure they own their “to do” list. Don’t leave with more to do than they do.
65. Put effort into maintaining trust and rapport in the relationship.
66. Set up a joint agenda prior to the meeting to identify issues of mutual interest. It’s not just about you or them.
67. Talk to the franchisee ahead of time to gain their commitment to the meeting.
68. Don’t turn your visits into report cards; franchisees want support, not to be judged.
69. Schedule the next visit while on-site and include items to be covered next time.
70. Balance compliance visits with business development and relationship building visits.
71. Visit every unit – don’t have favorites.
72. Set up a dinner in the evening to round off long visits.
73. Continue to monitor how sales and businesses results are affected following field audits.
74. Get field operations to think about questions they need to ask of franchisees and information they need to share prior to their visit.

How to provide useful and engaging leadership updates

Thanks to table facilitator: **Cassandra Hill**

75. Be clear on who the communication is for and that you are talking to the right people. Have a clear agenda and follow it.
76. Start with the achievements and link these to evidence and metrics so this has credibility. And finish on a positive such as restating your mission, goals and core purpose.
77. Always name challenges that are on people’s minds and how you are addressing these.
78. Acknowledge the contribution of individuals or groups during the update. Make it about “us” not just you.
79. Use multiple methods of communication, including email, phone calls, conference calls, and webinars.
80. Keep topics fresh and relevant to franchisees. Always relate messages back to “what this means to you is....”
81. If it is a conference call invite people to submit their questions ahead of time.
82. Demonstrate how the franchisor’s goals align with franchisees’ goals.



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How to ensure franchisees feel informed about issues impacting on them and their business

Thanks to table facilitator: Barb Moran-Goodrich

83. Find a middle ground between over-communication and under-communication.
84. Use the franchise convention to communicate plans and progress for the following year. Set the year's theme there, as well!
85. Change up the communications strategy to keep it fresh.
86. Have a 'Fast Five' email, e.g. 5 tips or initiatives that can be read in 5 minutes.
87. Use online training portals to spread the amount of training. Similarly, use e-learning to prepare for roadshows and ease the content presented in the roadshow so there's more time for two way discussion.
88. Face-to-face regional meetings are most effective.
89. Monitor open rates of emails and adjust the strategy accordingly.
90. Conduct webinar and open mic sessions each month. Make sure there is enough time for questions.
91. Keep webinars relevant and informative.
92. Have a topic of the month podcast and a follow-up call on this.
93. Always ask how we can help and what we can do better. If possible, face-to-face is best.
94. Make it okay for franchisees to come and speak openly. This helps to build trust.

How to effectively communicate change so you get franchisee commitment

Thanks to table facilitator: Eric Stites

95. Profitability is #1 goal. What's in it for me? Understand and appeal to what is important to the franchisee.
96. If possible make gradual incremental changes. Don't ask people to make wholesale changes at once.
97. Make sure the home office team is unified and committed to the change. You can't lead from behind.
98. Educate, collaborate and communicate. Use franchisees as "lighthouses" to get buy-in!
99. Identify the goal and results the change is expected to accomplish.
100. Hold a quarterly face to face meetings relevant committees to keep them informed.
101. Have research and data to back up your changes.
102. Understand and use the language of the audience.
103. Have a fully integrated strategy, with tactics and benchmarks.
104. Video can be effective for communicating updates.



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How to consult with franchisees on important strategic issues so everyone feels heard

Thanks to table facilitator: David Steinberg

- 105. Create an open environment of trust and communication. Be transparent with your decision making processes!
- 106. Create sub-groups that provide feedback on specific and relevant topics.
- 107. Create a field team, made up of executives and coaches that visit franchisees to collect best practices.
- 108. Create a process to collect and provide constructive feedback from these visits.
- 109. Create and implement a process to act on the feedback and communicate actions or responses back to franchisees.
- 110. Have franchisees submit topics. Do a weekly video with an executive interviewing a franchisee on that topic.
- 111. Hold regular regional meetings.

How to communicate with franchisees so they feel safe to share financial or personal information

Thanks to table facilitator: Craig Glelsten

- 112. Have an open discussion to discuss mutual expectations.
- 113. Have a full-day course planned by franchisor on P+L, cash flow statements. Franchisor takes benchmarks and shares these with franchisees.
- 114. Franchisor gives franchisees a chart of accounts to use so there is consistency.
- 115. It's important to use accurate and relevant Key Performance Indicators (KPIs)
- 116. Franchisee buy-in comes from other franchisees.
- 117. Get franchisees to speak at annual meetings to discuss benefits of sharing data.
- 118. Listen to the fears and concern of franchisees and work out a way to alleviate these.
- 119. Share aggregate P+L statements with the network.
- 120. Make it a priority to have individual conversations with franchisees on financial issues.
- 121. Cultivate influencers and champions to encourage others to share their data.
- 122. Use franchisor executives as leaders of performance groups, but don't pressure people to join these groups.

How to create engaging and useful national conventions and regional meetings

Thanks to table facilitators: Stuart Williams and Mitch Cohen

- 123. Know your audience and adjust presentations to suit their needs.
- 124. Share financial and KPI results and trends.
- 125. Promote the value of the meeting and ensure the topics are relevant and useful.
- 126. Invite vendors, with appealing new products or services and have them present.
- 127. Use local franchisees who are experts in a topic, have them share their knowledge to other franchisees.
- 128. Include rollouts of new initiatives.
- 129. Make it mandatory to attend the conference.
- 130. Charge a conference fee to ensure the quality is great.
- 131. Have top franchisees lead roundtables and write up the outcomes as takeaways.
- 132. Include some fun events and teambuilding exercises.
- 133. Follow up with a survey to learn what worked and what could be improved.
- 134. Have awards evenings.
- 135. Have top franchisees present in panels and workshops.

How to ensure large meetings that address controversial issues, remain constructive

Thanks to table facilitator: William Vincent

- 136. Don't have open mics where people can take over from the floor.
- 137. Have a process to gather comments and questions in a constructive and safe manner. For instance, invite people to submit questions beforehand.
- 138. Use small groups to discuss hot issues and prevent a mob mentality from occurring.
- 139. Keep discussions balanced and ask people to also provide feedback on what is working.
- 140. Have clear guidelines for how people are expected to behave.
- 141. Don't avoid discussing the hot issues but have a competent facilitator on hand to manage the group's emotions.
- 142. Keep people on task by having guidelines and facilitators for discussions.
- 143. Take notes during meeting to show people you are listening. And don't get defensive when responding to questions or giving explanations.
- 144. Develop task force to address the issue and to act as a sounding board.



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How to ensure the Franchise Support Office is responsive to franchisee survey feedback

Thanks to table facilitators: Jim Squire and Tim Shuy

- 145. Focus on key topics and have clear unambiguous questions.
- 146. Keep surveys relatively short and to the point.
- 147. Include surveys on products and services provided by the franchisor.
- 148. Keep an eye out for survey fatigue.
- 149. Keep survey responses confidential so franchisees can share their true feelings.
- 150. Strive for 70% completion or greater.
- 151. Mix qualitative and quantitative questions.
Ensure you give franchisees “feedback on their feedback”. Strive to create actionable items from surveys.
- 152. Form advisory council to share survey results.
- 153. You can get better responses after meetings like conventions.

“Common communication mistakes”

Thanks to table facilitator: Lydia Fogerty

- 154. Not asking enough questions.
- 155. Speak but don’t listen.
- 156. Approaching conversation with right attitude.
- 157. Email etiquette, not proofing, wrong tone.
- 158. Assuming understanding of the situation.
- 159. Not having defined goals/expectations.
- 160. Replying all to everyone, not understanding ownership/defined roles.
- 161. No follow-up.
- 162. Not respecting time of day or communication absence.

How to Rebuild Trust and Give Feedback Without Making Others Defensive

Thanks to table facilitators: Shane Evans and Graham Weihmiller

- 163. Stay open-minded and listen to the feedback.
- 164. Be transparent with your behavior and decision making.
- 165. Ask the person how they like to receive information (e.g. Sugar coated or candid)
- 166. Be aware of your body language and tone of voice. Watch for defensiveness.
- 167. Ask for permission before giving feedback.
- 168. Provide feedback in-person or by phone, not by email.
- 169. Ask questions like “What do you think about the way your store looks?” Let them tell you.
- 170. Always provide feedback professionally and with grace. Leave people with their dignity.
- 171. Start with a compliment, something they do well.
- 172. Remind people, you’re on the same team. Look for things you have in common.
- 173. Admit your mistakes. Don’t try to cover things up.
- 174. Don’t ignore a problem or rationalize the blame away from you.
- 175. Focus on solutions and the future – not on apportioning blame or on the past.
- 176. Don’t assume people understand the WHY. Go back to the purpose of your feedback and ensure you are coming from the right place.