



Whitepaper

Franchisee Management Suite

Unifying your infrastructure,
so you can focus on growing
your brand.



Executive Summary

In this white paper we are presenting a new Appian Application Franchisee Management Suite oriented to the franchising businesses. This application takes into consideration that franchising businesses face the same challenges. The franchisor needs to have a strong backbone of IT services, processes, and procedures in order to improve the relationship between franchisor and franchisee. The franchisor

also requires data collection for analytics that can be utilized by the franchisor to improve products or services. The objective of this application is to have a unique platform to manage all of the franchisee, contact, agreement, store, and project information. Additionally, the application will provide a 360 degree view for all entities that interact in the communication between franchisor and franchisee.

Introduction

Franchising is a distribution system for products and services where one company, with proven success in a specific business area, shares all of the specific knowledge and experience about a product or service with another independent investor. The investor replicates the same success and pays an initial fee plus a monthly percentage of the sales. The franchisor is the original owner of the idea and the franchisee is the independent investor, the agreement between them is called a franchise.

In 2015, according to the International Franchising Association, franchising businesses represented around 889 billion USD with a positive tendency in comparison to previous years. One of the main challenges of the franchisee business is to build a solid infrastructure with IT systems and procedures to support the backbone of a franchise. In order to build a solid infrastructure, franchisors need to conduct an analysis of client systems, processes, procedures, and support and what they will require in order to support the onboarding of new franchisees.

The Franchisee Management Application has an overall system to consolidate the data related to agreements, contacts, franchisees, stores, and projects. Assessments and inspections will help the franchisor improve the relationship with the franchisees, improve communications at distinct levels (store and projects), and optimize the awareness

of important dates such as agreement renewals and lease / license expiration.

The Franchisee Management Application has the following modules:

Franchisees — This module allows to the user to edit franchisee details like name, address, and points of contact. The module also identifies responsibility of distinct areas within the franchisee, so the user can easily identify a person to contact for a specific topic.

Stores — This module allows you to view and edit store details like address, contacts, channels, important dates, and operation hours. The module also allows the user to utilize videos and pictures for a complete dashboard with the relevant data from the franchising perspective.

Projects — This module allows the user to create, edit, and update a project and milestones so that the franchisor can keep track of all of the projects executed over existing stores (major remodel, minor remodel, relocation) or when a new store is created.

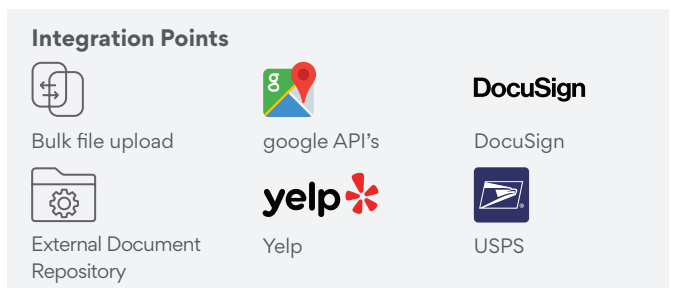
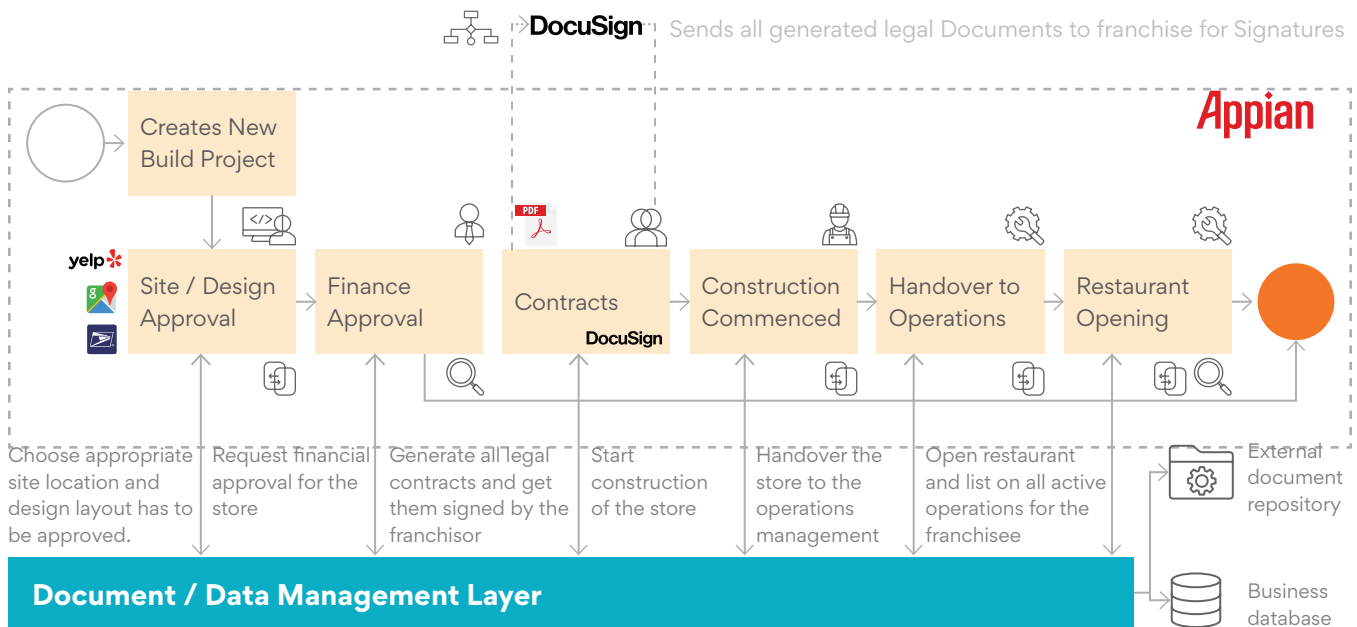
One of the most important steps to initiate with the business is to evaluate a location / site and be responsible with the investment in making sure that investment risk is evaluated based on the geo-location of competitors in the area. In the image following later in this whitepaper, you can see how data integrations participate in a new build project.

Franchisee Management will keep a holistic view of your franchisees, stores, and projects as well as enhance the communication and awareness of business events.

Franchisee Management List of Functionalities:

- \\ Reusable Framework — database driven functionalities, so the franchisor can set-up his / her own project milestones by project type and region, ordering access, store channels, and store data elements.
- \\ Ability to track and capture multiple project categories (new build, remodel, closure) and associated store actions such as New Build, Relocation, Major Remodel, Minor Remodel, Closure, Relocation Closure, Relocation New, and any other type of store actions. This includes providing the necessary workflow of reviews and approvals required to complete the store project.
- \\ Guide for team members in order to execute standard process and procedures across the company.
- \\ Enables the capture of milestone data for a project / site name such as mandatory milestones, plan, forecast, actual date, tracking completion, remarks, and upload documents associated with each milestone.
- \\ Live integration with external data sources to make a strong platform for decision making — **Google, USPS, Yelp, Video me.**
- \\ Enables calculation of duration and cumulative duration between milestones.
- \\ Native mobile and desktop interfaces that enable the users to work on the road with offline capabilities.
- \\ Ability to add new non-mandatory milestones to a specific project and change the position in the project so the franchisor can decide when the new milestone task will be assigned and executed.
- \\ Ability to modify the group responsible for executing a certain milestone during the execution of a project, only if the milestone has not been completed yet.
- \\ Enables updating of forecast and actual completion date as project progresses and prevents updates to the plan date.
- \\ Enables data capture and tracking for project budget and actual construction costs.
- \\ Enables project search by different parameters such as franchisee, project number or other store attributes.
- \\ Ability to upload any supporting documents against each milestone step including drawings (CAD), images, layout, design documents, and documents such as: MS-Word, PDF, MS-PowerPoint, spreadsheet, key correspondence (emails), and specific types of documents.
- \\ Ability to capture site / location analysis details including demographic details of the site and trade zone, competition, traffic generators, and SWOT analysis. Data related to traffic generators and competitors is automatically loaded from external data sources (Google Places, Maps).
- \\ Ability to show and load near-by competitors' information with ratings and feedback from Google Places and Yelp.
- \\ Ability to easily navigate between franchisee, store, projects, contacts, attachments, and agreements in order to provide a 360 degree view.

- Ability to review historical store condition assessments with **offline capabilities**, so that the inspector can capture the information onsite even if there is no internet connection.
- Proper data control access based on role data security.
- Ability to provide awareness of business events such as overdue temporary closure, license expiration, contract expiration, milestone completion or due).
- Access to performance reports segregated by store, franchisee, and projects.
- Simplified communication with franchisee for contract signature using an integration with DocuSign.
- Ability to capture important legal dates for an organization and store such as agreement renewal trigger dates, development terms (remodel dates), termination notice dates, and renewal agreements.
- Ability to create and maintain document templates and dynamically generate documents such as contracts, deeds, approval letters, etc.
- Ability to provide a user specific UI with limited set of activities (i.e. read only view or handle task approvals). The most important step to initiate is to evaluate a location / site and be responsible with the investment by making sure the investment risk is evaluated based on the geo-location of competitors in the area.



Conclusion

Franchisee Management has all of the functionalities required by the franchisors that will allow them to improve the service and relationship with the franchisees, while maintaining a single source of information related to franchisees, contacts, agreements, projects, and stores. This application will help in areas such as development, legal, and operations of the franchisor and will provide a strong

platform for decision making when an external location is evaluated from the current location to better understand the situation of a specific location.

Finally Franchisee Management will help keep the site evaluation process agile with the automatic loading of traffic generators coming from Google Places and Google Maps.

About Persistent

We are a trusted Digital Engineering and Enterprise Modernization partner, combining deep technical expertise and industry experience to help our clients anticipate what's next. Our offerings and proven solutions create a unique competitive advantage for our clients by giving them the power to see beyond and rise above. We work with many industry-leading organizations world-wide including 14 of the 30 most innovative US companies, 80% of the largest banks in the US and India, and numerous innovators across the healthcare ecosystem. Our company fosters a values-driven and people-centric work environment. Our strength of over 22,500+ employees is spread over 18 different countries across the globe.

USA

Persistent Systems, Inc.
2055 Laurelwood Road, Suite 210
Santa Clara, CA 95054
Tel: +1 (408) 216 7010
Fax: +1 (408) 451 9177
Email: info@persistent.com

India

Persistent Systems Limited
Bhageerath, 402
Senapati Bapat Road
Pune 411016
Tel: +91 (20) 6703 0000
Fax: +91 (20) 6703 0008



Persistent

www.persistent.com