

## Franchise Business Performance and Growth Worksheet

**Be prepared to discuss the below items. This worksheet is for your preparation only.**

<b>Franchise Manager:</b>					
<b>Assigned Objectives</b>					
<b>Metric</b> <small>(e.g. Revenue, New Customer Adds, etc.)</small>		<b>Goal / Objective Detail</b> <small>(e.g. \$1M Net License Revenue, 5 New Banking Customers, \$10M Consumption Revenue, etc.)</small>			
<i>Briefly review the Franchise Manager's goals and metrics as context for the remaining coaching discussion.</i>					
<b>Ecosystem Analysis Summary &amp; Results</b> <small>(e.g. Analysis used; Results of scoring, segmenting, or other analysis; or you may attach spreadsheets used, etc.)</small>					
<p><b>1</b> <i>Can he/she clearly and briefly describe the conclusions he/she has reached about their available ecosystem analysis and how they arrived at those conclusions?</i></p> <p><i>KEY QUESTION: What factors did you use in your analysis for performance ability, business synergy, and growth commitment?</i></p>					
<b>Portfolio &amp; Allocation Strategy</b> <small>(i.e. How or what reasoning will you use to create portfolios and allocate your objectives)</small>					
<p><b>2a</b> <i>Can he/she clearly and briefly describe the portfolio and allocation strategy they used in creating their coverage model?</i></p> <p><i>KEY QUESTION: Why do you think this is the most effective strategy to use given your team, available ecosystem and objectives?</i></p>					
<b>Portfolios</b> <small>(What portfolios are you creating and who will manage each?)</small>					
<b>Portfolio:</b>		<b>Assigned Team Member:</b>		<b>Team Member Role:</b>	
<b>Type</b>	<b>Allocated Objective(s)</b>	<b>Expected Run Rate</b>	<b>Opportunity</b>	<b>Team Member Strengths / Weaknesses</b>	
<p><b>2b</b> <i>Can he/she briefly review each portfolio they created, the allocated objectives for the portfolio, the expected run rate and opportunity in the portfolio, and which team member is assigned to the portfolio and why?</i></p> <p><i>KEY QUESTION: What will be the challenges and benefits of this particular portfolio and its assigned team member?</i></p>					
<b>Achievement Plan Highlights</b>					
<b>Sales &amp; Marketing Strategies &amp; Tactics Highlights</b> <small>(What demand generation and sales execution strategies will you leverage?)</small>			<b>Partner Management Strategies &amp; Tactics Highlights</b> <small>(What partner management, collaboration, planning and motivation strategies will you leverage?)</small>		
<p><b>3a</b> <i>Can he/she discuss and defend the sales and marketing strategies and tactics they intend to use to achieve their franchise objectives?</i></p> <p><i>KEY QUESTION: How will this plan directly impact your franchise performance?</i></p>			<p><b>3b</b> <i>Can he/she discuss and defend the partner management strategies and tactics they intend to use to achieve their franchise objectives?</i></p> <p><i>KEY QUESTION: How will this plan directly impact your franchise performance?</i></p>		
<b>Partner Development Strategies &amp; Tactics Highlights</b> <small>(What skills / capabilities development will you drive across the franchise?)</small>			<b>Partner Recruitment Strategies &amp; Tactics Highlights</b> <small>(What net-new partner and net-new solutions/practices/offers strategies will you leverage?)</small>		
<p><b>3c</b> <i>Can he/she discuss and defend the partner development strategies and tactics they intend to use to achieve their franchise objectives?</i></p> <p><i>KEY QUESTION: How will this plan directly impact your franchise performance?</i></p>			<p><b>3d</b> <i>Can he/she discuss and defend the partner recruitment strategies and tactics they intend to use to achieve their franchise objectives?</i></p> <p><i>KEY QUESTION: How will this plan directly impact your franchise performance?</i></p>		

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<p><b>Resource Strategy &amp; Tactics Highlights</b> (How will you drive the appropriate relationship building and resource collaboration?)</p> <p><b>3e</b> Can he/she discuss and defend the resource strategies and tactics they intend to use to achieve their franchise objectives?</p> <p>KEY QUESTION: How will this plan directly impact your franchise performance?</p>	<p><b>Investment Strategy &amp; Tactics Highlights</b> (Where and when will you spend discretionary funds; how will you decide?)</p> <p><b>3f</b> Can he/she discuss and defend the investment strategies and tactics they intend to use to achieve their franchise objectives?</p> <p>KEY QUESTION: How will this plan directly impact your franchise performance?</p>	
<p><b>Development Plan Highlights</b></p>		
<p><b>Staff Recruitment / Changes</b></p>	<p><b>Team Skills Development</b></p>	<p><b>Personal Skills Development</b></p>
<p><b>4</b> Can he/she briefly review any staff changes or recruitment they feel is needed to support the pan, as well as any skill development needed for the team and for them personally?</p> <p>KEY QUESTION: How will these changes and/or development activities directly impact your franchise performance?</p>		
<p><b>Measure, Monitor &amp; Review Plan</b></p>		
<p><b>Cost Management</b> (How will you manage and monitor your expenses?)</p> <p><b>5a</b> Can he/she discuss and defend the cost management plans they intend to put in place?</p> <p>KEY QUESTION: What challenges do you expect these efforts to create?</p>	<p><b>Metrics</b> (What metrics and/or measures will you use to track your progress?)</p> <p><b>5b</b> Can he/she briefly describe the metrics they intend to use to monitor their progress, including both lagging and leading indicators?</p> <p>KEY QUESTION: How will each of these metrics help you drive the right kind of behavior and performance on the team?</p>	
<p><b>Pipeline Disciplines</b> (What pipeline discipline will you drive and follow?)</p> <p><b>5c</b> Can he/she briefly describe the pipeline discipline they intend to follow?</p> <p>KEY QUESTION: How will this discipline impact both yours and the team's ability to achieve your objectives?</p>	<p><b>Forecast Disciplines</b> (What forecast discipline will you drive and follow?)</p> <p><b>5d</b> Can he/she briefly describe the forecast discipline they intend to follow?</p> <p>KEY QUESTION: How will this discipline impact both yours and the team's ability to properly set expectations about performance?</p>	
<p><b>Review Rhythm</b> (What reviews will you conduct when and what metrics will you measure when?)</p>		
<p><b>5e</b> Can he/she briefly describe the review rhythm they intend to follow and what metrics will be used in each review?</p> <p>KEY QUESTION: How does this rhythm help you manage your business and make course corrections early?</p>		