The Automation Handbook

Using Templates, Campaigns and Workflows to automate operations

SmartStart Guides

FranConnect®
FRANCHISING BUILT-IN™

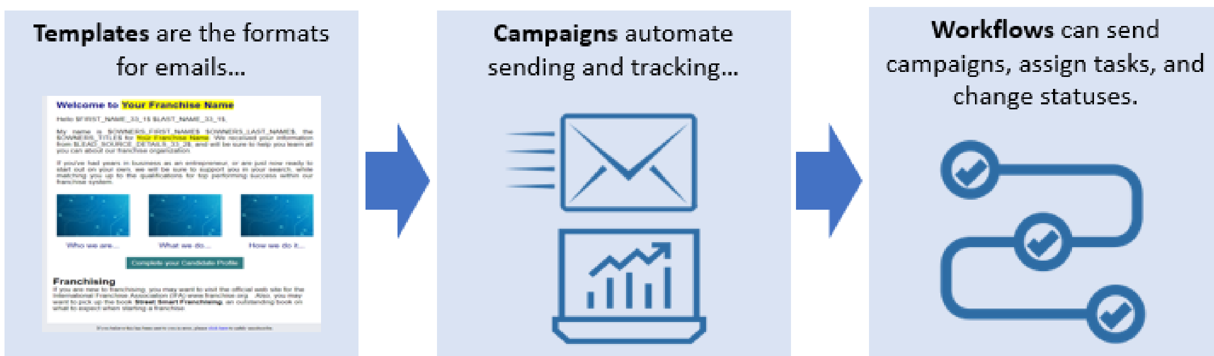
Table of Contents

Introduction to Templates, Campaigns and Workflows 3
Overview - Setting Up Automated Workflows 4
About Templates 4
About Campaigns 6
About Recipient Groups 6
About Workflows 6
Sales Automation 9
Franchise Welcome 9
Application Workflows 13
FDD 16
Validation 18
Discovery Day 21
Franchise Dead Lead 23
Info Mgr Automation 28
General Liability Insurance Expiration 28
Franchise Renewal 29
Customer Feedback 30
FDD – 14 Day Holding Period Expired 31
14 Days Since Franchisee Last Contacted 32
Lease Expiration 33
Franchise Location Termination 34
Franchise Location Transfer 35

Important Note: Before you build a workflow, check your Inactive Workflows! FranConnect systems installed with the FastTrack package have many of these workflows built in.

Introduction to Templates, Campaigns and Workflows

Tasks that you do over and over can be automated, using tools in FranConnect. The three tools most frequently used are templates, campaigns, and workflows.



Templates are the foundation for campaigns but can also be used to standardize single emails you send to leads. For example, if every lead receives the same email from you at an undefined time during the sales process, you may create a template without assigning the template to a campaign. In this case the template is available for use whenever appropriate as a standardized email that goes out to the lead. The easiest way to create a template is to edit one that FranConnect has already provided.

Campaigns are groups of email templates, arranged to be sent in a defined order. They can be used for marketing purposes ("Here is why you should buy our Franchise", informational purposes ("Here are details about this event") or to gather lead data ("Filling out the application is the next step in the process, click here to fill out the application").

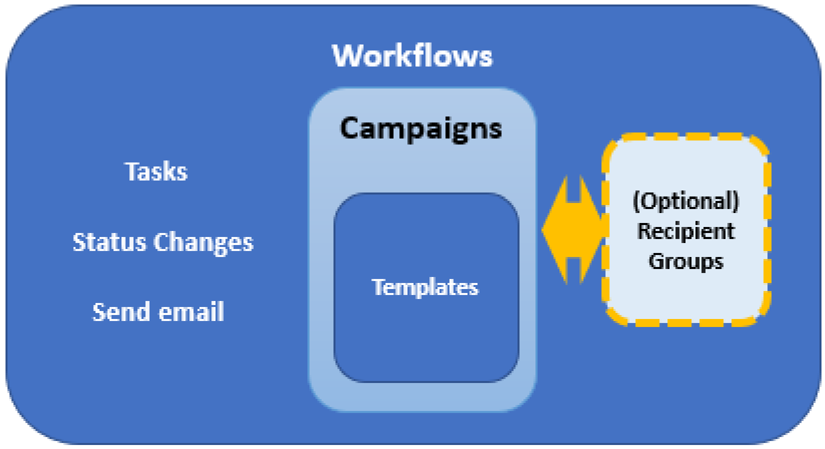
To automate the delivery of a campaign you create a **workflow**. Workflows allow you to create system guidelines for when campaigns are sent, tasks are created, and statuses are changed automatically.

Any of these elements can be used independently – you can make an email template that you send without a campaign,

Overview - Setting Up Automated Workflows

Workflows may contain campaigns, which may in turn contain templates and groups to which the campaign will go.

Relationship of automation components



Both workflows and recipient groups require campaigns to already exist. Campaigns can use pre-existing templates, or you can build the templates inside the campaign-building interface. Two potential orders for building these are:

Templates > Campaigns > (Recipient Groups) > Workflow

OR

Campaigns (building templates inside) > (Recipient Groups) > Workflow

Let's see how each component contributes to the automation process.

About Templates

Templates let you design email communications that show off your brand, and are personalized to the recipients.

You can choose from pre-built layouts and customize with your own artwork, or you can build your own templates from scratch or using HTML code that you already have. For tips on using existing HTML code in FranConnect templates, please see the page http://portland.franconnect.net/help/emaildesignguidelines/

You can customize the content in your emails to include greetings by name, and important information from the recipient's record in FranConnnect, such as the expiration date of an insurance policy. To do this, you use keywords – placeholders for the information. For more about keywords, see "About Keywords" in the Step by Step guide for the module you're using – Sales, Information Manager, or CRM.

Best Practices for email templates

When designing email templates, keep in mind that you're sending to a wide variety of recipients, and you want your message to get into the most inboxes possible (not to be trapped by spam filters), and to look good to the most people when it gets there, so that they can and will read it. Once they have read it, you want to point them smoothly to the action you want them to perform.

Template Contents and Design

Grab Them in the Subject Line: Pay special attention to the subject line of your email, since that may be all of it that your contacts see at first. Customize the subject line to be relevant to your call to action, and have a personal connection to the contact. Use the keyword in your subject line if possible to make to personalize your appeal.This will help to improve the delivery rate of your campaign and reduce the rate at which it gets trapped in spam filters.

Keep it compact: many emails come back undeliverable due to size restrictions by the recipients' servers. To maximize successful delivery, try to keep the whole email size (including attachment, if any) within 5 MB. Ideally, Email contents for email marketing should be less than 1 MB.

Image-to-Text ratio: A 60/40 text to image ratio should be maintained for best results. Recipients are less engaged with long, text-heavy emails, and lots of text can prevent them from easily seeing and heeding your call to action. Image file sizes need to be considered because a mobile device will not load images as fast as a desktop or laptop. Large images in your template and large attachments will impact the email's size, and therefore the delivery success rate of your campaign. Try to keep the size of each image at 20k or less. Do not use Flash or gif animations - they won't work and just add to the overall file size of the email.

Recommended image sizes for email templates:

- Banner image width - 600px
- Image size for one column - 574px
- Image size for two column - 274px
- Image size for three column - 174px
- Recommended file size - below 1mb (not more than 5mb)
- Recommended file resolution - 72 PPI
- Color mode - RGB
- File Type - JPG, PNG

Optimize your calls-to-action (CTAs) - In the email content, there should be very specific and limited "Call to Action" links or buttons. Emails containing more links are often marked as spam based on recipient server spam filter settings.

Keywords: using keywords can give your email a personal touch, but for large campaigns they can also slow down the delivery rate of emails. Use fewer keywords based on email content ratio, and your campaigns will be sent at a faster rate.

Alt tag usage - Alt tags are snippets of text related to an individual image that are commonly used in email so that before an image loads, the user has an idea of what the image is, what the offer might be, or the overall theme of the email. You can define alt text in the template using the editor.

Save time and reinforce your branding by re-using Existing Templates - Select an existing template and use 'Copy and Customize' to create a new template. *Don't forget to change the subject line and make sure to update the email subject to make it more personalized*

About Campaigns

Campaigns are typically groups of emails that are sent out to recipients who meet specific criteria. Those criteria could be met individually, like being added to the system or having a status change, or as a group, for example all people whose insurance expires in the same month, or people assigned to a Recipient Group.

Sales module campaigns go out to potential franchisee candidates. CRM module campaigns go to potential leads of your franchisees. When setting up a CRM campaign, you can set up the campaign to apply to ALL locations (a Master Campaign), or assign it to apply to selected franchises.

In addition, you can choose to set up a CRM campaign as a "drip" campaign, which means that you can define multiple emails to be sent at intervals you define, all as part of the same campaign.

Information Manager campaigns go to franchisees.

When should I use campaigns vs. emails in a workflow?

Campaigns can be tracked, which often makes it worth setting up a campaign and a template even when you have only one email to send. A good rule of thumb is to use campaigns for external emails, and embed emails directly into a workflow only for internal emails, such as reminders or information emails to corporate staff.

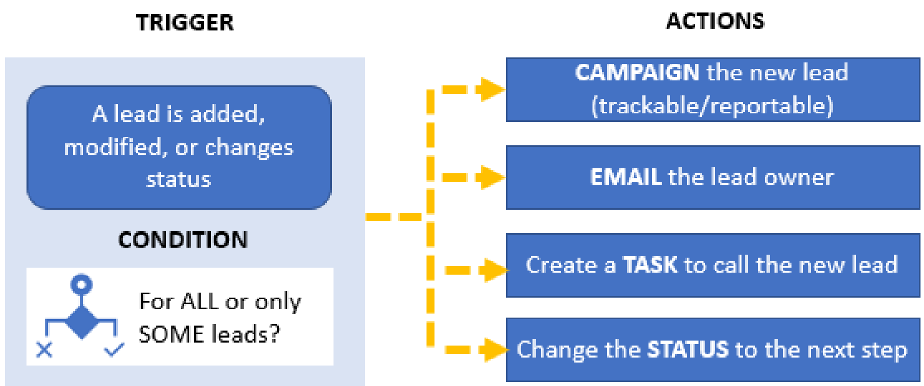
About Recipient Groups

Groups are mailing lists of recipients who match a set of criteria you define based on fields in their profiles. You can build a static group by defining the group once and associating leads, or you can build an automated (Smart) group, which will add new recipients into the group as they enter the system.

Groups can only be associated with one status-based campaign at a time. They can be associated with multiple promotion-based campaigns.

About Workflows

Workflows set up actions that can be kicked off automatically, based on another (triggering) action that takes place in FranConnect. You can choose for an action to happen for all leads or locations, or you can have it happen to only seom locations, based on conditions. The illustration below shows an example of what might be automated for a new lead coming into the system.



The **trigger** is the event that kicks off the workflow actions. You can trigger a workflow in different cases, depending on which module you're working in. The chart below shows what triggers can be used in each module that has workflow capability.

Sales	Information Manager	CRM
Record is added/modified	Record is added/modified	Record is added/modified
	Based on date associated with record	Based on date associated with record
Events: Lead signs FDD Lead fills out a specified web form First activity logged Specified campaign is sent to a lead Call is logged Email sent to lead Lead status changed When specified candidate portal activity is logged	**Events:** Location signs FDD Location fills out specified web form First activity logged Specified campaign is sent Call is logged Email is sent Data update request approved/rejected Location transferred/terminated Last contacted date is past N days Last visit date is past N days Visit scheduled/completed Customer complaint is logged	**Events:** Existing contact fills out a specified web form Transaction is created Opportunity is created First activity logged Status changed

What's the difference between a status-driven campaign and a workflow based on a status change?

In a workflow, the status change is an **event**, *meaning that the initiation of that status kicks off the workflow. A campaign will continue to progress as long as the lead stays in that status, and will stop when that lead moves out of the status, even if the status is not complete.*

Conditions let you target specific leads or locations to have the action performed. For example, not ALL killed leads would warrant a follow-up campaign, but it might be desirable to send a 90-day follow-up email to leads who were killed for non-response, or who indicated that they were deferring their decision. The chart below shows what conditions can be used in each module that has workflow capability.

Sales	Information Manager	CRM
	Franchisee Type: one or more • Corporate • Active • In Development	Leads vs. Contacts
You can make conditions based on values for one or more fields in the record, including fields that you add.		

Actions are the instructions you give for what happens when the conditions are met. The same workflow can kick off several actions, for example sending an email to a lead and adding a task to the lead owner to follow up with a call. The chart below shows what actions can be used in each module that has workflow capability.

Sales	Information Manager	CRM
Send email campaign	Send Email	Send email campaign
Change status	Send Campaign	Change status
Send email	Create Task	Send email
Create task		Create task
Change candidate portal status		

Create task: You can create a task, designate a task type and a priority, and assign it to the lead owner by role, or to one or more people explicitly from a list. You can schedule that task to happen immediately, after an interval, or have no due date (a "timeless" task).

Change status or candidate portal status: You can advance a lead along the sales pipeline by assigning a new status from the list.

Send email: You can send an email to anyone you designate. Note: typically, this is used for internal emails only, because no tracking statistics apply to an email created in the workflow directly.

Send email campaign: You can set up one email or a series of emails to be sent to recipients you designate. You can also report on the results of the emails, making this a preferred way to send emails to leads or franchisees.

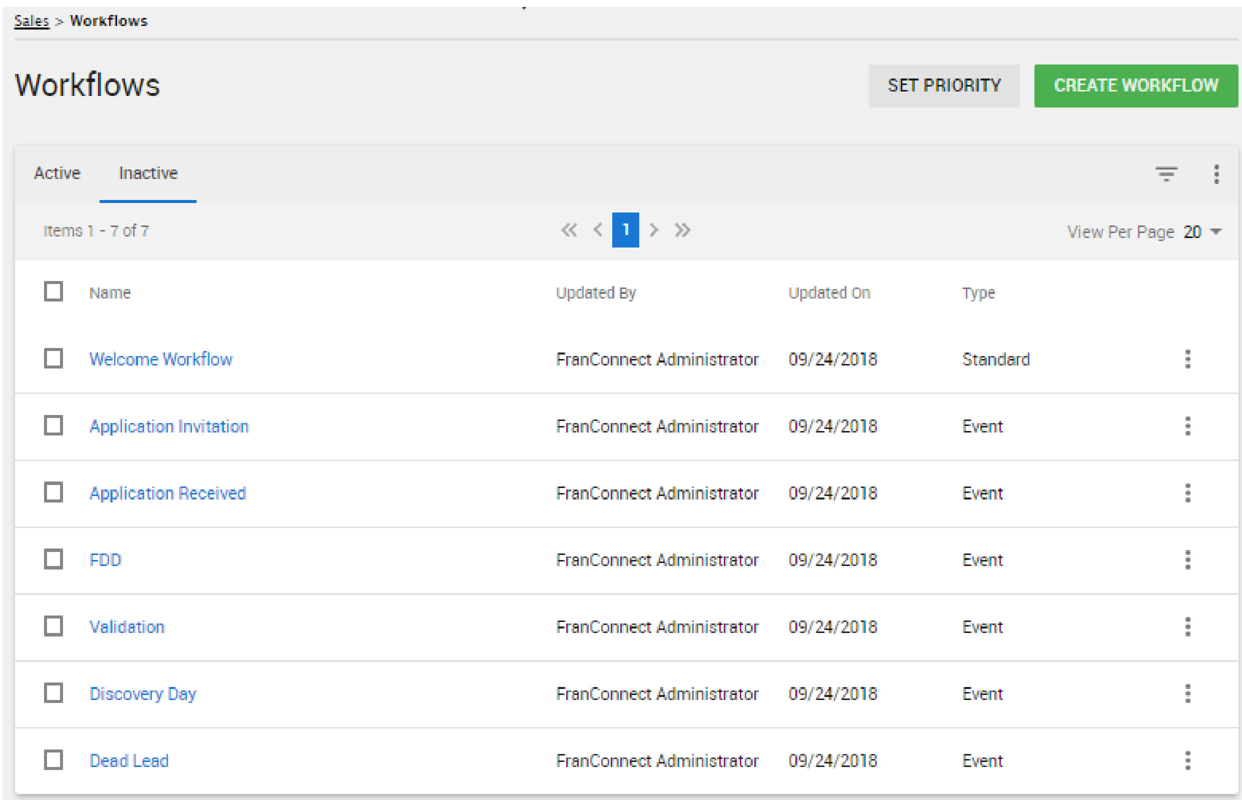
Detailed steps for creating these actions can be found in the Help Center, accessible from the FranConnect product.

Sales Automation

This section gives you the specifications to create templates, campaigns and workflows to accomplish your automation objectives. For step-by-step instructions, please see the Help Center in the FranConnect product.

Franchise Welcome

You can paste the text of any listed template into the template in your FranConnect instance. Be sure to change out the graphic labeled “Company Name” with your own corporate logo and customize any areas that are highlighted in yellow to your own company’s information.



Franchise Welcome Workflow

Business Need

When a new lead is added, send an email to the lead thanking them for their inquiry, and send the lead owner a task to inform them that a new lead is in their queue.

Summary

TRIGGER	ACTIONS
Lead is Added to the System	1) Send CAMPAIGN to the new lead 2) Send TASK to the lead owner
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Franchise Welcome Template
Campaigns	Franchise Welcome Campaign

WORKFLOW DETAILS

Type	Standard – Lead is Added
Trigger	**When do you want to execute this workflow?** When a new lead is added to the system
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – Thank you for your inquiry!

Notes

Franchise Welcome Campaign

Using a campaign will enable you to check on receipt, open and click rates for this email later.

PREPARATION

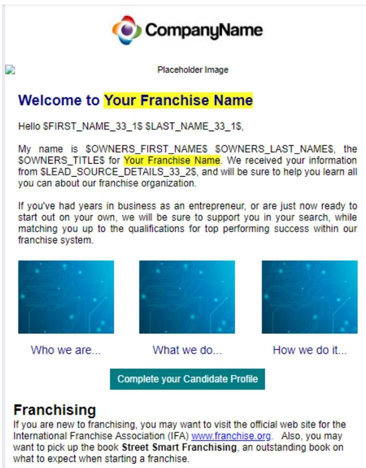
Templates	Franchise Welcome

CAMPAIGN DETAILS

Campaign	Set sender name and reply address Send the first email: As soon as the campaign is associated with recipients Associated Template: Franchise Welcome
Used in	Franchise Welcome Workflow

Franchise Welcome Template

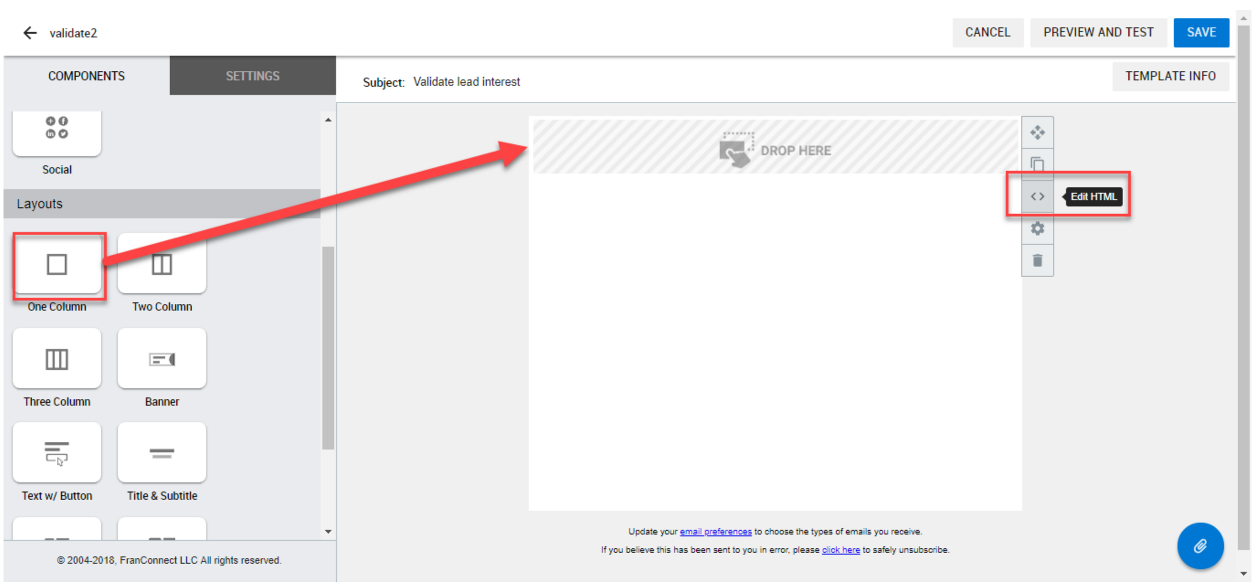
This template has placeholders for videos about your company (the blue squares). In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate web pages where the blue squares are.



The formatting for this template is too complex to include in this guide. If you would like HTML code for this template, contact your FranConnect representative.

To use the HTML code, open your template and drag a One Column block onto the template workspace, then hover over the block to get the content menu. Navigate to the "Edit HTML" (<>) icon, and in the ***Edit HTML*** *screen, replace all the text with text you copy from the .txt file for the template. Click* ***Update****, and then customize your template!*

The screenshot below shows where to find the block and the menu item.



Application Workflows

Application Invitation Workflow

Business Need

When a lead advances to the step of being ready to attend a Discovery Day, send an email with information on how to prepare for Discovery Day.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow	
Templates	Application Invite
Campaigns	Application Invite
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Application FOR All Territories
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – Apply to be a Franchise Owner

Notes

Application Invite Campaign

Using a campaign will enable you to check on receipt, open and click rates for this email later.

PREPARATION	
Templates	Application Invite

CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: After this many days – 30 Associated Template: Dead Lead
Used in	Application Invitation Workflow

Application Invite Template


CompanyName

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise. Please use this link to formally apply for our franchise opportunity.

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.
Thank you,
$OWNER_SIGNATURE$

Paste the text on the right into your template and customize the highlighted items.

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise. Please use this link to formally apply for our franchise opportunity.

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.
Thank you,
$OWNER_SIGNATURE$

Application Received Workflow

Business Need

When a lead returns an application, change their status to "Application Received" and send a task to the lead owner to let them know that the application is awaiting their review.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Change Status to "Application Received" 2) Create Task "A Lead has completed the application"
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow	
Templates	(none)
Web forms	Lead Application Details (included in FranConnect)
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When a Lead fills out the Web Form – Lead Application Details
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Change Status to "Application Received" Create Task – assign to Owner, schedule task time Immediate, fill in the message you would like the owner to receive.

Notes

FDD

FDD Workflow

Business Need

When a lead is sent the Franchise Disclosure Document (FDD), send an email with information on how to read an FDD.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow	
Templates	Discovery Day
Campaigns	Discovery Day
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO FDD FOR All Territories
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – FDD

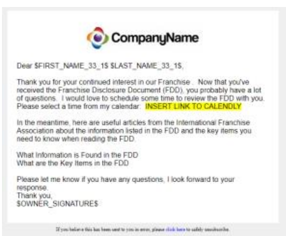
Notes

FDD Campaign

Using a campaign will enable you to check on receipt, open and click rates for this email later.

PREPARATION	
Templates	[FDD](#)
CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: As soon as the campaign is associated with recipients Associated Template: FDD
Used in	[FDD Workflow](#)

FDD Template


CompanyName

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise . Now that you've received the Franchise Disclosure Document (FDD), you probably have a lot of questions. I would love to schedule some time to review the FDD with you. Please select a time from my calendar: INSERT LINK TO CALENDLY

In the meantime, here are useful articles from the International Franchise Association about the information listed in the FDD and the key items you need to know when reading the FDD.

What Information is Found in the FDD
What are the Key Items in the FDD

Please let me know if you have any questions, I look forward to your response.
Thank you,
$OWNER_SIGNATURE$

Paste the text on the right into your template and customize the highlighted items.

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise . Now that you've received the Franchise Disclosure Document (FDD), you probably have a lot of questions. I would love to schedule some time to review the FDD with you.
Please select a time from my calendar: INSERT LINK TO CALENDLY

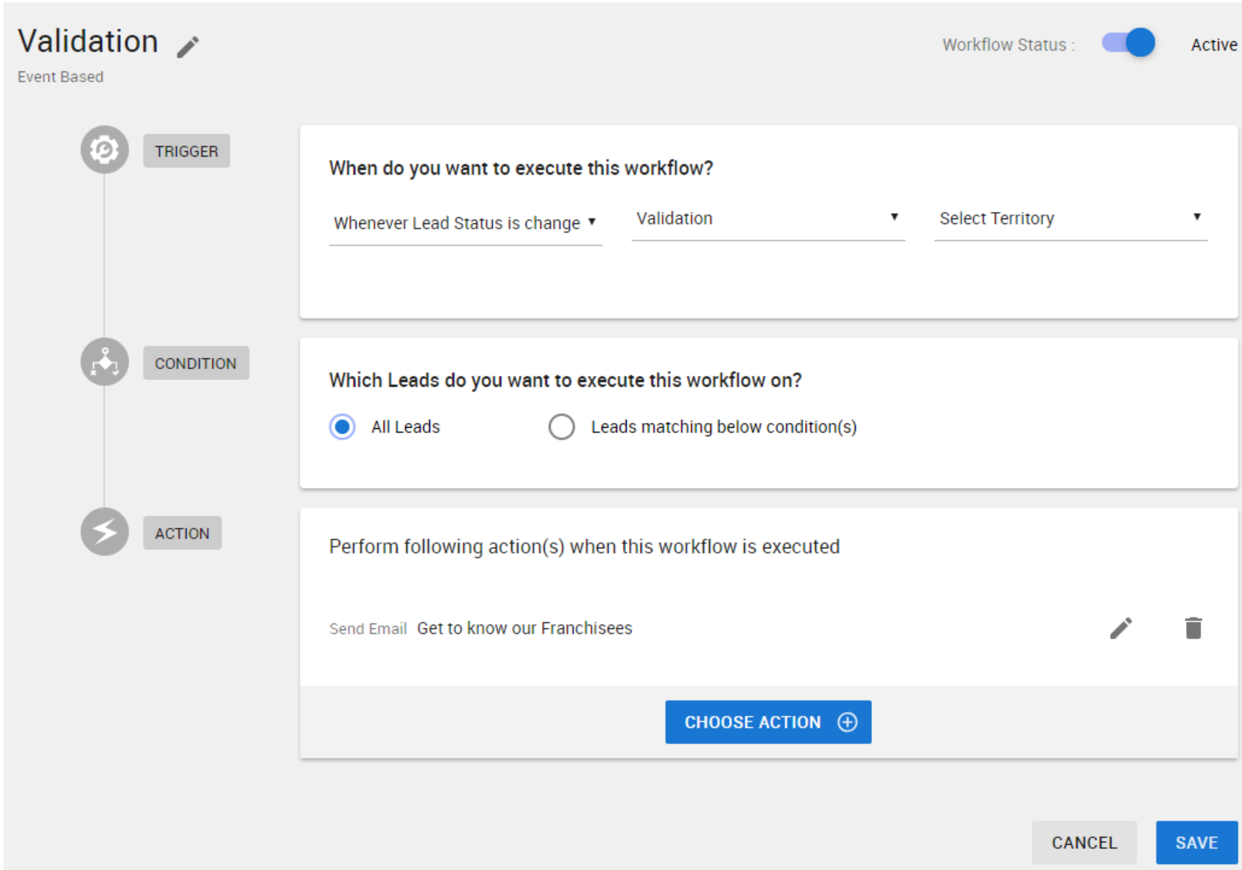
In the meantime, here are useful articles from the International Franchise Association about the information listed in the FDD and the key items you need to know when reading the FDD.

[What Information is Found in the FDD](#)
[What are the Key Items in the FDD](#)

Please let me know if you have any questions, I look forward to your response.
Thank you,
$OWNER_SIGNATURE$

Validation

Validation Workflow



Business Need

When a lead advances to the step of Validation, send an email with some existing franchisee testimonials.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Discovery Day
Campaigns	Discovery Day
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Discovery Day FOR All Territories
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – Discovery Day

Notes

The Status "Discovery Day" shown are the ones preconfigured in the Devel FastTrack package…your Status "Discovery Day" may vary. Choose accordingly from your system's Discovery Day-related status.

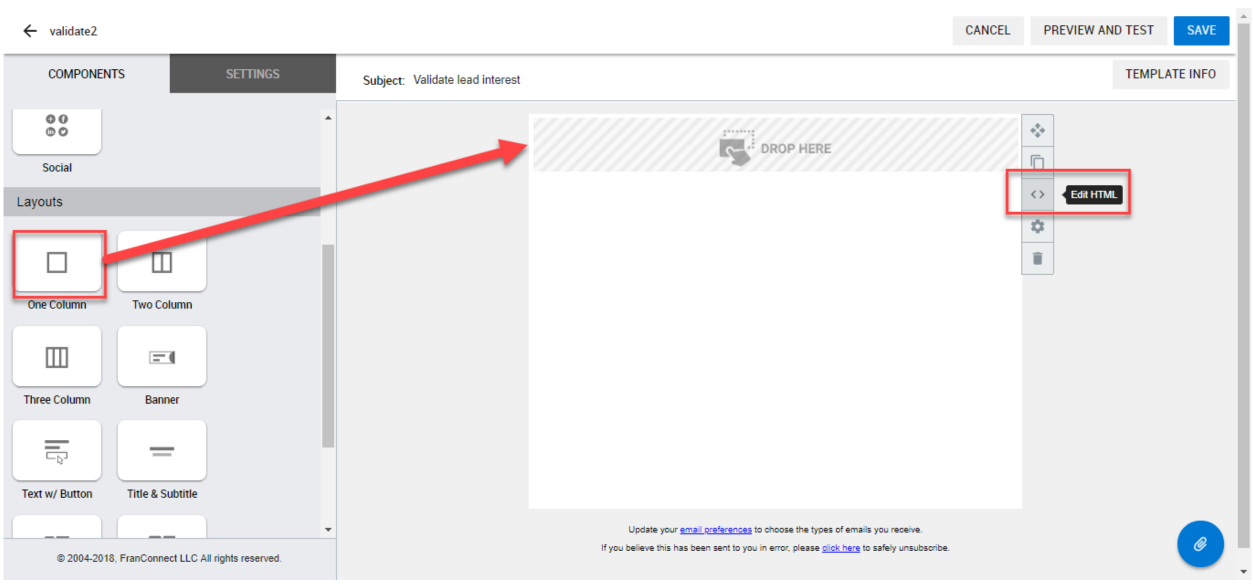
Validation Template

This template has placeholders for pictures of existing franchisees. In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate videos, if you have them.

The formatting for this template is too complex to include in this guide. If you would like HTML code for this template, contact your FranConnect representative.

To use the HTML code, open your template and drag a One Column block onto the template workspace, then hover over the block to get the content menu. Navigate to the "Edit HTML" (<>) icon, and in the ***Edit HTML*** *screen, replace all the text with text you copy from the .txt file for the template. Click* ***Update****, and then customize your template!*

The screenshot below shows where to find the block and the menu item.



Discovery Day

Discovery Day Workflow

Business Need

When a lead advances to the step of being ready to attend a Discovery Day, send an email with information on how to prepare for Discovery Day.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow	
Templates	Discovery Day
Campaigns	Discovery Day
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Discovery Day FOR All Territories
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – Discovery Day

Notes

The Status "Discovery Day" shown are the ones preconfigured in the Devel FastTrack package...your Status "Discovery Day" may vary. Choose accordingly from your system's Discovery Day-related status.

Discovery Day Campaign

Using a campaign will enable you to check on receipt, open and click rates for this email later.

PREPARATION	
Templates	Discovery Day
CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: As soon as campaign is associated with recipients Associated Template: Discovery Day
Used in	Discovery Day Workflow

Discovery Day Template


CompanyName

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise. Please use this link to formally apply for our franchise opportunity.

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.
Thank you,
$OWNER_SIGNATURE$

If you believe this has been sent to you in error, please click here to safely unsubscribe.

Paste the text on the right into your template and customize the highlighted items.

Hi $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

We're looking forward to having you come to our Discovery Day and meet our corporate team. We want you to get a good feeling for what Franchisor is all about. If you've never been to a Discovery Day, you may find this article helpful.

How to Get the Most out of a Franchise "Discovery Day"

As always, if you have any questions please don't hesitate to ask.

Thank you,
$OWNER_SIGNATURE$

Franchise Dead Lead

Dead Lead Re-Campaign Workflow

Business Need

30 days after a lead is placed in Killed Lead status, for the reason “deferred decision”, an email is sent to the killed lead asking for feedback on why the decision was deferred.

Summary

TRIGGER	ACTIONS
Email is placed in Dead Lead Status	1) Send CAMPAIGN to the dead lead after 90 days
CONDITIONS	
Reason IN Deferred Decision, No Response	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Dead Lead
Campaigns	Dead Lead

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Dead Lead FOR All Territories
Condition	**Which leads do you want to execute this workflow on?** Field: Lead Killed Reason Condition: IN Deferred Decision, No Response
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – Dead Lead Campaign

Notes

The Lead Killed Reasons shown are the ones preconfigured in the Devel FastTrack package...your lead killed reasons may vary. Choose accordingly from your system’s Killed Lead Reasons.

Dead Lead Template


CompanyName

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise. Please use this link to formally apply for our franchise opportunity.

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.
Thank you,
$OWNER_SIGNATURE$

If you believe this has been sent to you in error, please click here to safely unsubscribe.

Paste the text on the right into your template and customize the highlighted items.

Hello $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

I am writing because it has been a while since I heard from you. If you've decided not to purchase a franchise or have purchased another brand, I would love to know. Any feedback you have is welcome as it only helps us to achieve our franchise growth goals moving forward.

Thank you,
$OWNER_SIGNATURE$

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.
Thank you,
$OWNER_SIGNATURE$

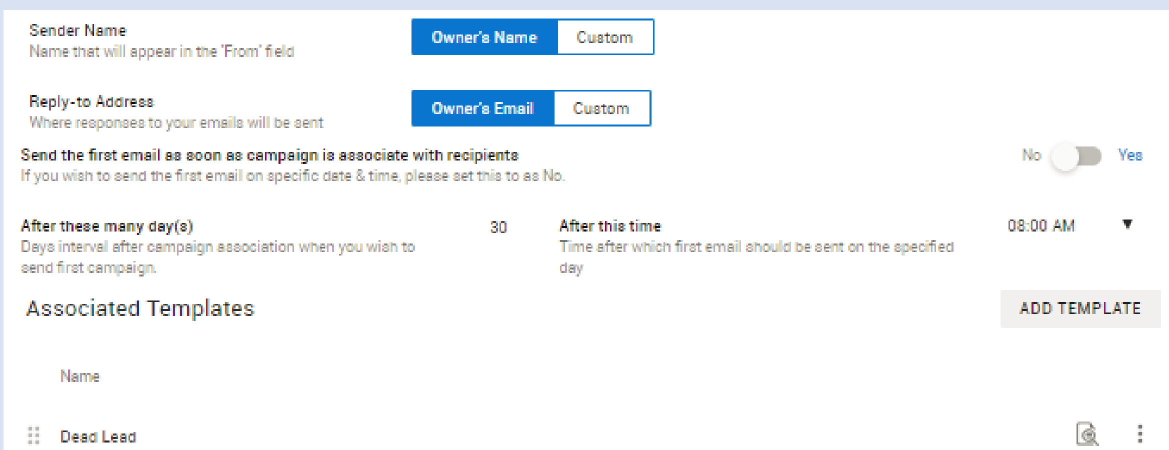
Used in the Dead Lead Campaign and the Dead Lead Workflow

PREPARATION

Templates	Dead Lead

CAMPAIGN DETAILS

Campaign



Hello $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

I am writing because it has been a while since I heard from you. If you've decided not to purchase a franchise or have purchased another brand, I would love to know. Any feedback you have is welcome as it only helps us to achieve our franchise growth goals moving forward.

Thank you,
$OWNER_SIGNATURE$

Dead Lead Campaign

PREPARATION	
Templates	Dead Lead
CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: After this many days – 30 Associated Template: Dead Lead
Used in	Dead Lead Workflow

Campaign

PREPARATION	
Templates	
CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: After this many days – 30 Associated Template: Dead Lead
Used in	

Info Mgr Automation

General Liability Insurance Expiration

Business Need

45 days prior to the expiration date of the insurance policy on record, all Corporate and Active Locations will receive an email with a link to the General Liability Insurance web form requesting that they update the policy information and provide a copy.

Summary

TRIGGER	ACTIONS
Insurance Expiration Date	2) Send EMAIL to franchise CONTACT EMAIL 45 days before insurance policy expiration date
CONDITIONS	
All Corporate, All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, and web forms before adding workflow	
Templates	General Liability Insurance Expiration
Campaigns	
Web form	General Liability Insurance
WORKFLOW DETAILS	
Type	Date Based
Trigger	**When do you want to execute this workflow?** Choose a Date Field: Insurance Expiration Date Date of Execution: Before - 45 day(s)
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Corporate, All Active
Workflow	**Perform following action(s) when this workflow is executed** Send Email: Expired General Liability Insurance Exisiting Email Template: Expired General Liability Insurance To: Center Email

Notes

The General Liability Web Form is set to update the franchisee record ONLY AFTER receiving approval under Data Update Requests. Someone from your team will need to approve the form before it enters the franchisee record. You can send this email to another address instead of the Center Email.

Franchise Renewal

Franchise Renewal Workflow

Business Need

365 days prior to the Term Expiration Date of the franchise location, all Active Locations will receive an email reminding them that their renewal is coming up in one year and that they will need to submit their intent to renew. 180 days later (6 months prior to the term expiration date) they will receive a six-month reminder to submit their intent to renew.

Summary

TRIGGER	ACTIONS
Term Expiration Date	1) Send CAMPAIGN (includes 2 email templates) to franchisee 365 days before Term Expiration Date.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, and web forms before adding workflow

Templates	One Year Franchise Renewal Template Six Month Franchise Renewal Template
Campaigns	One Year and Six-Month Renewal Campaign
Web form	

WORKFLOW DETAILS

Type	Date Based
Trigger	**When do you want to execute this workflow?** Choose a Date Field: Term Expiration Date Date of Execution: Before - 365 day(s)
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Send Campaign – One Year and Six Month Renewal Campaign

Notes

The one-year renewal reminder can be removed from the campaign if you only want to remind your franchisees at six months.

Customer Feedback

Customer Feedback workflow

Business Need

When customer feedback is logged, a task will be created for a member of the corporate team to review the feedback with the franchisee.

Summary

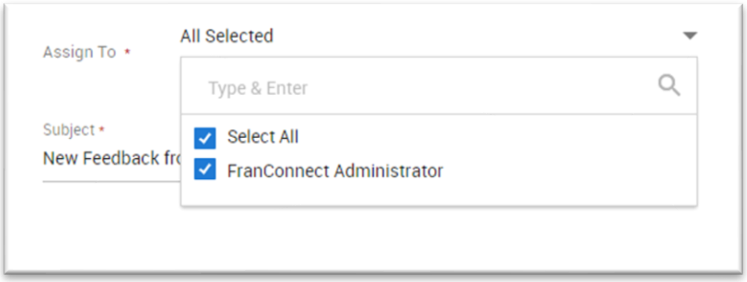
TRIGGER	ACTIONS
When a Customer Complaints is logged	1) Create Task for corporate team member to review customer feedback with franchisee.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, web forms and tasks.	
Templates	
Campaigns	
Web form	Customer Feedback
Task	New Feedback from Customer – Add Corporate Team Member
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When a Customer Complaints is logged
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Create Task – New Feedback from Customer

Notes

The task to notify a corporate team member has already been created, assign the task to the team member.



FDD – 14 Day Holding Period Expired

Business Need

After a Franchisee is sent the FDD at Renewal, someone at corporate can be notified, via a task, that the holding period has expired.

Summary

TRIGGER	ACTIONS
Date Holding Period Requirements Expire by FDD	1) Create Task for corporate team member to engage franchisee after holding period requirements expire.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, web forms and tasks.	
Templates	
Campaigns	
Web form	
Task	Holding Period Requirements Expired – Add Corporate Team Member
WORKFLOW DETAILS	
Type	Date Based
Trigger	**When do you want to execute this workflow?** Date Holding Period Requirements Expire by FDD
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Create Task – Holding Period Expired for Franchisee

Notes

The task to notify a corporate team member has already been created, assign the task to the team member.

14 Days Since Franchisee Last Contacted

Business Need

When someone from the corporate team has not contacted the franchisee in 14 days, someone on the corporate team will receive a task to contact the franchisee.

Summary

TRIGGER	ACTIONS
When last contacted date is not updated for X days	1) Create Task for corporate team member to engage franchisee after 14 days have passed since last contact.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, web forms and tasks.	
Templates	
Campaigns	
Web form	
Task	Franchisee has not been engaged in 14 days – Add Corporate Team Member
WORKFLOW DETAILS	
Type	Event Based
Trigger	**When do you want to execute this workflow?** When last contacted date is not updated for X days 14 days
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Create Task – Contact Franchisee

Notes

The task to notify a corporate team member has already been created, assign the task to the team member.

Lease Expiration

Business Need

90 days prior to the lease expiring for the location, an email is sent to the franchisee reminding them that their lease is about to expire.

Summary

TRIGGER	ACTIONS
Lease Expiration	1) An email is sent to the franchisee letting them know their lease is about to expire in 90 days.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, web forms and tasks.	
Templates	Lease Expiration
Campaigns	
Web form	
Task	
WORKFLOW DETAILS	
Type	Date Based
Trigger	**When do you want to execute this workflow?** Choose a Date Field: Lease Expiration Date of Execution: Before- 90 days
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Send Email: Lease Expiration Existing Email Template: Lease Expiration To: Center Email

Notes

You can send this email to another address instead of the Center Email.

Franchise Location Termination

Business Need

After a location is terminated multiple team members are assigned tasks to complete termination items.

Summary

TRIGGER	ACTIONS
When a Location is terminated	1) Tasks are assigned to responsible parties when a location is terminated.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, web forms and tasks.

Templates	
Campaigns	
Web form	
Task	Complete Termination Process

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When a Location is terminated
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Create Task: Complete Termination Process

Notes

Edit the recipient of the task, the subject and description to meet your business process. More than one task can be created for this trigger to accommodate the many things that need to be done by members of your team upon location termination.

Franchise Location Transfer

Business Need

After a location is transferred multiple team members are assigned tasks to complete transfer items.

Summary

TRIGGER	ACTIONS
When a Location is transferred	1) Tasks are assigned to responsible parties when a location is transferred.
CONDITIONS	
All Active	

Step by Step

PREPARATION - edit necessary templates, workflows, web forms and tasks.

Templates	
Campaigns	
Web form	
Task	Location Transfer Task

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When a Location is transferred
Condition	**Which Locations do you want to execute this workflow on?** Select Franchisee Type: All Active
Workflow	**Perform following action(s) when this workflow is executed** Create Task: Location Transfer Tasks

Notes

Edit the recipient of the task, the subject and description to meet your business process. More than one task can be created for this trigger to accommodate the many things that need to be done by members of your team upon location transfer.