Implementing FranConnect Opener

A Guide to Setting Up Checklists
You Can Really Use

SmartStart Guides

Implementing FranConnect Opener

Contents

Implementing FranConnect Opener

About the Opener Module

FranConnect Opener can help to reduce the number of days it takes to open a store, making you and your Franchisee profitable more quickly.

Opener tracks the project using a set of **Checklists**. These checklists contain **Tasks** that need to be performed before the unit can begin operations. Each task has certain information that we'd like to track:

- *Who* is involved with the task – one or more corporate individuals (chosen by name), any regional staff, franchise users (chosen by **Profile**), and suppliers.
- *Which* stores the task should be completed for. Most tasks will be for all locations, but some tasks will only apply to a sub-set. You can indicate subsets using **Store Types** or **Groups**.
- *When* the task is due to be completed. In addition, you can set up **Reminders** that the task is coming up, and **Alerts** when the task is due - or overdue.
- *Whether* the task is dependent on another task for its start or completion. There are several types of **Dependencies** that can be assigned. Some of these dependencies may be on project milestones, which are represented as **Reference Dates** in FranConnect Opener.

In addition, you can mark the entire project by the place that it is in the completion cycle. To do this, you will set **Project Status** values.

Jump Start – Quick Reference to Implementation Decisions

Answer the questions in the blue bars to prepare your checklists.
Click on any blue underlined link to jump to the instructions for getting started on that topic.

Gather tasks from all sources into a Task List

Just put them all in one place (we recommend our Worksheet) – you can sort and filter them as you go.

- For each task, what helpful tools can you provide to the task assignee? Documents with instructions, forms? A web link to instructions or forms? Pictures of correct display layout/signage? (Attachments/Links)
- What documents and/or pictures should be sent to Corporate from the locations? (These will go in Document and Picture Checklists)
    - Building permits?
    - Licenses for personnel?
    - Background information?
    - Pictures of construction or finished displays/signage?

Who is responsible for each task?

- Are there departments that oversee chunks of tasks? (Responsible Departments)
- Are there job descriptions, like Construction Manager, that oversee tasks, even if different people fill them for different locations? (Custom Profiles)
- Should the Franchise user be able to see or alter the task?

Are there some tasks that only apply to certain locations/certain implementation types (such as new store vs. store remodel)?

- Consider "Store Type" tasks if some stores can be exempted from some tasks
- Consider Secondary Checklists for one-off project types, like remodels
- Consider Secondary Checklists for many combinations, e.g. Kiosk Stores checklist + Delaware licensing list

Do some tasks involve dealing with suppliers?

- These may go in the Equipment checklist
- Consider grouping Equipment tasks by supplier for easier reference

Can some tasks only be done AFTER other tasks are completed (or started)?

- You can mark dependencies to chain SINGLE tasks together
- You can make a task dependent on MULTIPLE other tasks (e.g. can't outfit a truck until you buy the truck, acquire shelving, AND receive decals, but those three tasks don't depend on each other)
- You can make a task dependent on ONE OF SEVERAL other tasks via Milestone Triggers (e.g. you can apply for a Contractor License once you have hired any ONE of these licensed tradesmen: a Plumber, Electrician, Carpenter)

How much "reminding" do you want to do with task owners?

- Every task will send reminders on start and end date of task (set the email text in **Admin > Opener**)
- You can choose to remind before the START and END date of tasks individually
- You can choose to send a reminder for ALL tasks that are N days overdue (globally only)
- You can choose to make an escalation path for different task types (e.g. CRITICAL overdue tasks are reminded every 3 days, with increasingly larger audiences, non-critical tasks are reminded at 14 and 21 days, and not again)

Tips for making checklists easier to view

- Group View can let you put tasks together by similarity rather than timeline.
  Examples: responsible department, equipment supplier, project phase
- Masking unscheduled tasks makes the list less daunting, and as soon as the tasks they depend on are complete, they will migrate into the Pending task list (See the **Opener User Guide** for information)
- Filtering tasks cuts the list down, and each user can have his own saved filter (See the **Opener User Guide** for information)

Using Files and Attachments to Help Users Complete Tasks

An ideal Opener task is brief and to the point, but sometimes you want to provide some extra help to the task owner. Some examples are:

- Providing a portion of your procedures manual with detailed instructions on completing the task.
- Providing a form that the user should complete and return.
- Providing a picture of what the optimal retail display should look like.
- Giving a link to a web page where users can apply online for business licenses.
- Giving a link to an information document in your Hub Library.

Each task allows you to include either one document (file of any description), or one web link. If you have multiple items to include, you could build a folder in your Hub Library and include the documents in the folder.

Grouping Tasks

Often it is useful to view tasks grouped by similarity, rather than within the entire list. For example, there may be several tasks related to Construction, vs. tasks that are related to Licensure. There may be phases associate with a project, and certain tasks may belong in Phase 1 vs. Phase 2, etc.

Set task groups in the Admin section (see adding groups), and assign them on the individual tasks, as indicated in the instructions for adding and editing tasks.

About Task Dependencies

Tasks may be "timeless", in which case they have no time dependency, or they can depend on a number of factors. The chart below explains each dependency type. Date-dependent tasks often depend on the completion date of the project or other milestone, which can be chosen from the drop-down selector in this section of the task. If they depend on other tasks, they may be dependent on the beginning or the end of that task. A task may also be dependent on completion of a set of tasks (another checklist, for example).

Dependency	**Definition**	**Examples**
Date-dependent tasks	Task must occur relative to a certain date	▪ Shop competitors' prices in the last two weeks before opening ▪ Set tasks to be n weeks before go-live
Concurrent Tasks	One task depends on the start date of another	▪ Can order truck and truck signage at the same time
Sequential Tasks	One task cannot start until another is finished	▪ Truck must be delivered before you can apply signage

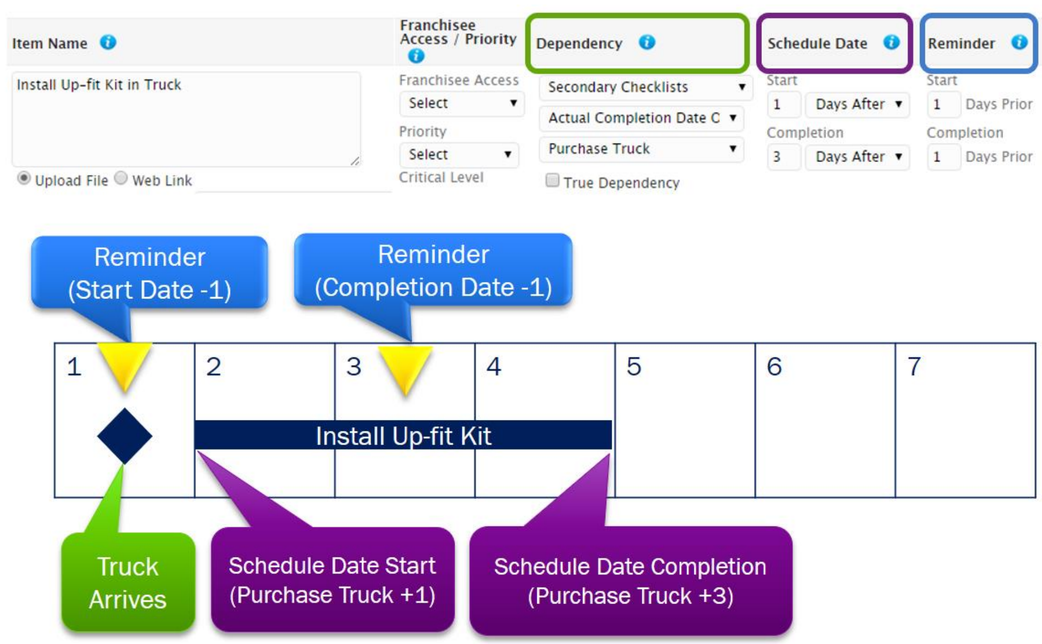
Dependency	Definition	Examples
Phased Tasks	An entire checklist must be complete before a task can begin	▪ All steps of hazardous materials certification must be complete before you can buy treatment chemicals

Using Task Reminders

FranConnect will send an email alert to the owner of each task on the scheduled Start Date and scheduled End Date of the task. These reminders cannot be suppressed. To set what the reminder email says, see [Creating Alert Email Content].

Using Task Start Reminders

You can set reminders for the beginning and completion dates of tasks, and alerts that fire when a deadline has been missed. You can set reminders to be sent a designated number of days either BEFORE or AFTER either the START or END of a task. Alerts are fired on the completion day, if the task is not marked as complete. The illustration below shows when reminders and alerts would fire to the task manager. Blue indicators show reminders, and purple indicators show when alerts would fire.



Setting Overdue Task Reminders

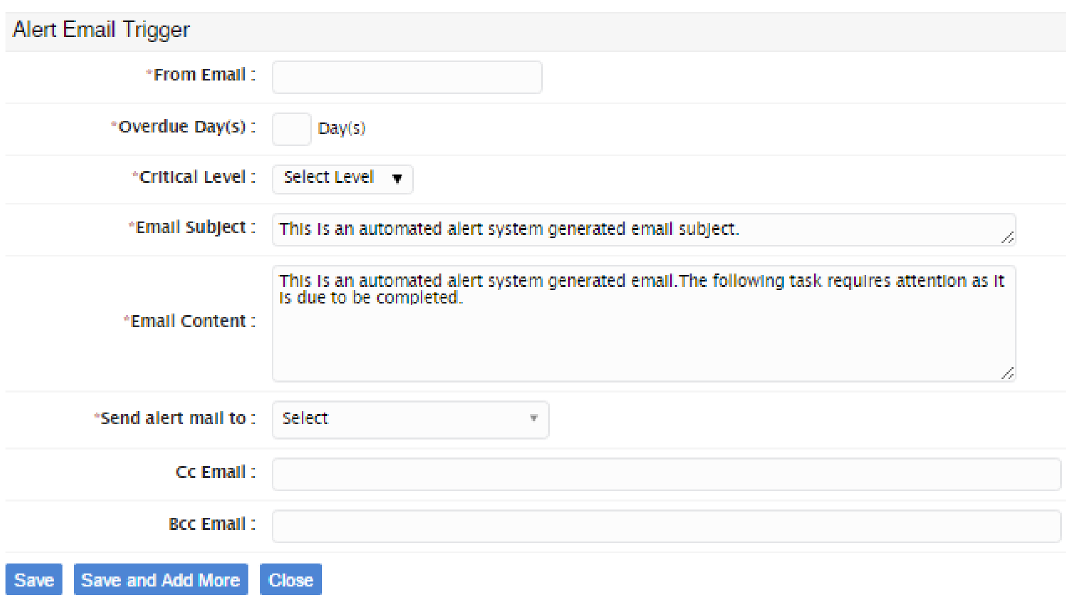
In addition to sending an alert at task beginning and task ending, and additional reminders a set number of days before the beginning and end of the tasks, you can choose to send alerts when a task becomes overdue. These alerts are set globally, rather than individually for each task.

There are two ways to trigger these alerts – to send an alert to the task owner a set number of days after the task becomes overdue, and to send additional alerts to others at set times after the task becomes overdue, based on the criticality of the task.

To set a global trigger to fire to the task owner when ANY task becomes overdue, navigate from **Admin > Opener** to **Overdue Alert Frequency**, and enter the number of days overdue a task will be when the alert gets sent.

Setting Overdue Task Alerts Based on Critical Level of Tasks

To set triggers to fire to other parties at designated intervals, based on the criticality of the tasks, navigate from **Admin > Opener** to **Configure Alert Email Triggers for Tasks**. Choose **Add Alert** and set the conditions under which the alert will be set.



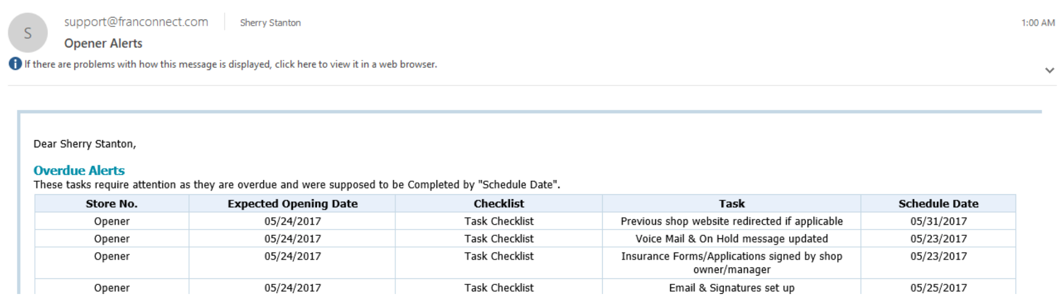
Set who the email will come from, and the number of days overdue the task must be, for the reminder to fire. This alert will fire for all tasks at the same level of criticality (critical, non-critical or system item). You can also send this alert to anyone in the FranConnect system (**Send alert mail to**) or any email address outside FranConnect (**Cc Email** and **Bcc Email**).

For example, you may set alerts to fire for critical tasks at 3 days, 5 days and 7 days, and for non-critical tasks to fire only when the task is 30 days overdue.

When you have set the conditions for alerts to fire and the message that will fire, click **Save** to save the record and finish, or **Save and Add More** to continue entering alerts. To exit without saving, click **Close.**

Creating Alert Email Content

For each type of reminder or alert, an email message is sent that contains a list of the tasks that are due, and additional text that you can specify. Here's an example of an Overdue Tasks email:



support@franconnect.com | Sherry Stanton 1:00 AM

Opener Alerts

If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Sherry Stanton,

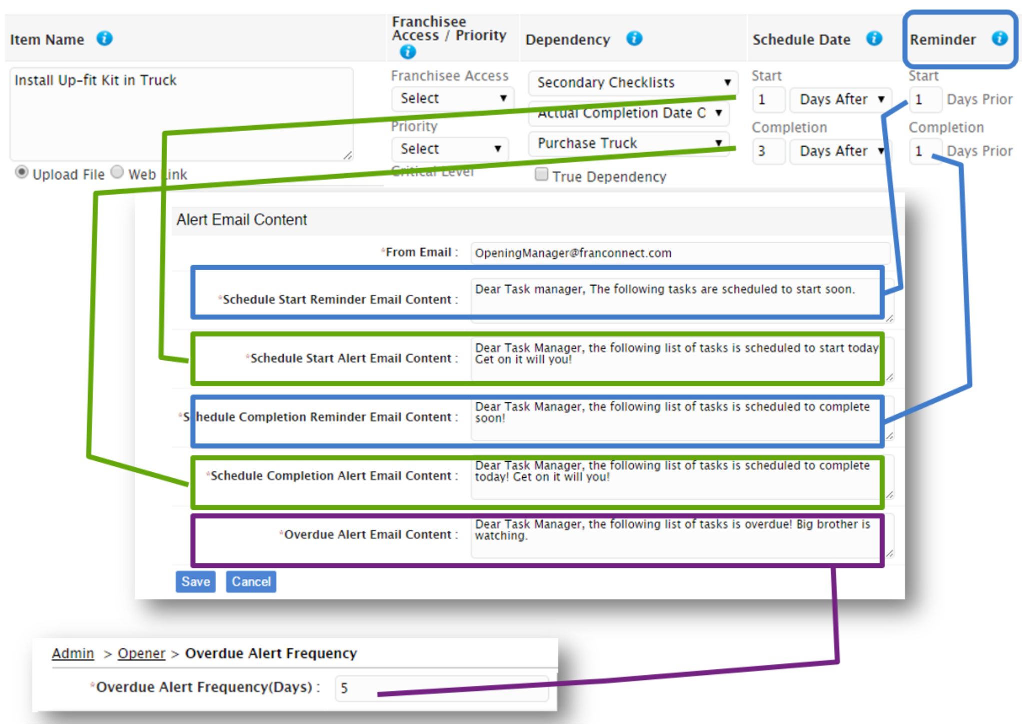
Overdue Alerts

These tasks require attention as they are overdue and were supposed to be Completed by "Schedule Date".

Store No.	Expected Opening Date	Checklist	Task	Schedule Date
Opener	05/24/2017	Task Checklist	Previous shop website redirected if applicable	05/31/2017
Opener	05/24/2017	Task Checklist	Voice Mail & On Hold message updated	05/23/2017
Opener	05/24/2017	Task Checklist	Insurance Forms/Applications signed by shop owner/manager	05/23/2017
Opener	05/24/2017	Task Checklist	Email & Signatures set up	05/25/2017

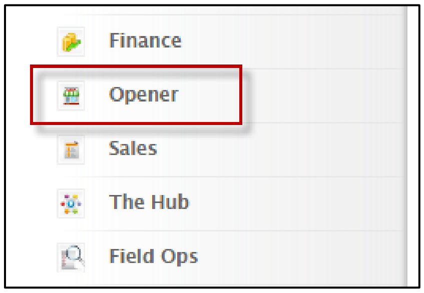
The diagram below shows how the email text in the **Admin > Opener > Alert Email Content** dialog maps to the reminders and alerts that you specify in the Admin section of FranConnect.

The sections in green fire on the scheduled start and end dates of the task, and cannot be suppressed. The sections in blue fire only for those tasks which have reminders specified on them. The section in purple fires for EVERY uncompleted overdue task if an Overdue Alert Frequency is specified in **Admin > Opener > Overdue Alert Frequency**.

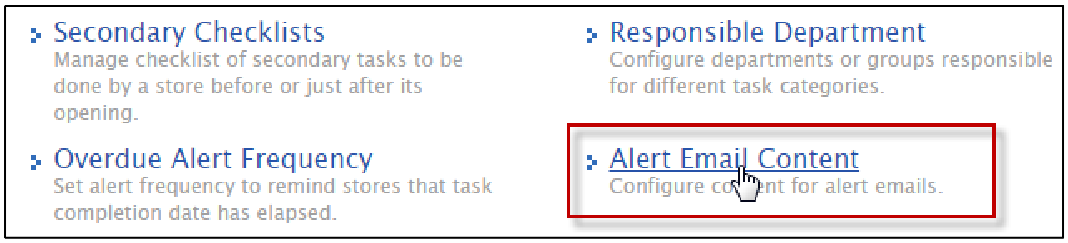


To specify the text for reminders and alerts:

1. From the Admin page, select **Opener** from the Navigation Panel.

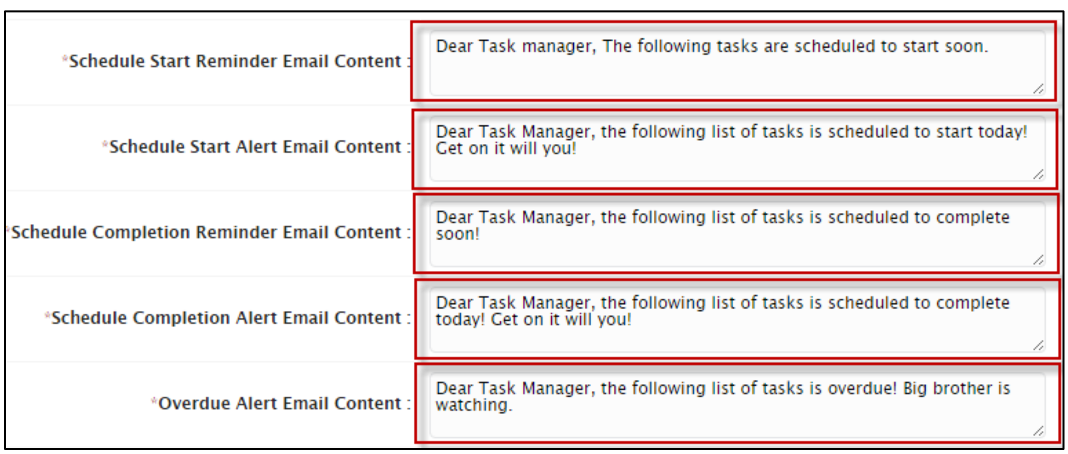


2. Click **Alert Email Content**



3. Input the **From Email** address (who will these alerts come from).

4. Edit the text boxes with the content you want to send to the manager of any task, when the time rolls around for the event listed. For example, the schedule start reminder email would contain the text of the email sent X days before a task begins, as set in the task.



5. Click **Save**.

About Checklist Templates

There are five main kinds of task list in Opener. First, there's the main TASK list. This is where the baseline checklist of opening tasks resides. These are the tasks that everyone must do when opening a location.

There may also be SECONDARY task lists. Secondary Lists are add-ons, for things that only happen at some openings – for example, you may have secondary construction lists which are different for different location types (freestanding vs. strip mall vs. kiosk) or different States (which might require different steps for licensing the franchise staff). You may also have checklists that happen at different times, like store remodels or the sale of an existing location to a new owner, which has a different set up opening steps.

The EQUIPMENT checklist adds the ability to list supplier contact information to a task.

The DOCUMENT checklist lets task owners upload necessary documents, like insurance and license certifications. All stakeholders can see those documents in the DOCUMENTS tab. You can also upload picture formats to the document checklist, for example a picture of a building permit taken with someone's phone.

The PICTURE checklist lets you upload pictures – for example, of progress on construction.

The differences between the Document and Picture lists are:

- Files uploaded to the Document List are displayed in the Location's Documents tab for easy reference. They may be of any file type, including pictures.
- Files uploaded to the Pictures List remain only in the Pictures Checklist tab. They must have file extensions that indicate that they are picture files, e.g. JPG, PNG, etc.

Where does this task belong?

All (or nearly all) locations must do it, it doesn't involve them sending you anything	Task Checklist
Task involves the owner submitting a file, including pictures of important documents	Document Checklist
Task involves the owner submitting a picture that doesn't need to be in the documents list	Picture Checklist
Task needs to include contact information for a supplier of the needed items	Equipment Checklist
Only some locations need to perform this task, or it's performed for a special function, such as a remodel	Secondary Checklist

About Milestone Triggers

If you'd like to combine the ability to estimate completion dates and the ability to adjust them based on completion of tasks, Milestone Triggers are the tool to use. To set up milestone triggers:

1. Set up Reference Dates, checking the box that designates them as "Milestones."
2. Set up the tasks that depend on the Milestones, including the dependency relationship.
3. Set up the tasks that, when complete, will trigger the change of the milestone date.
4. Set up milestone triggers in **Admin > Opener > Configure Milestone Date Triggers.**

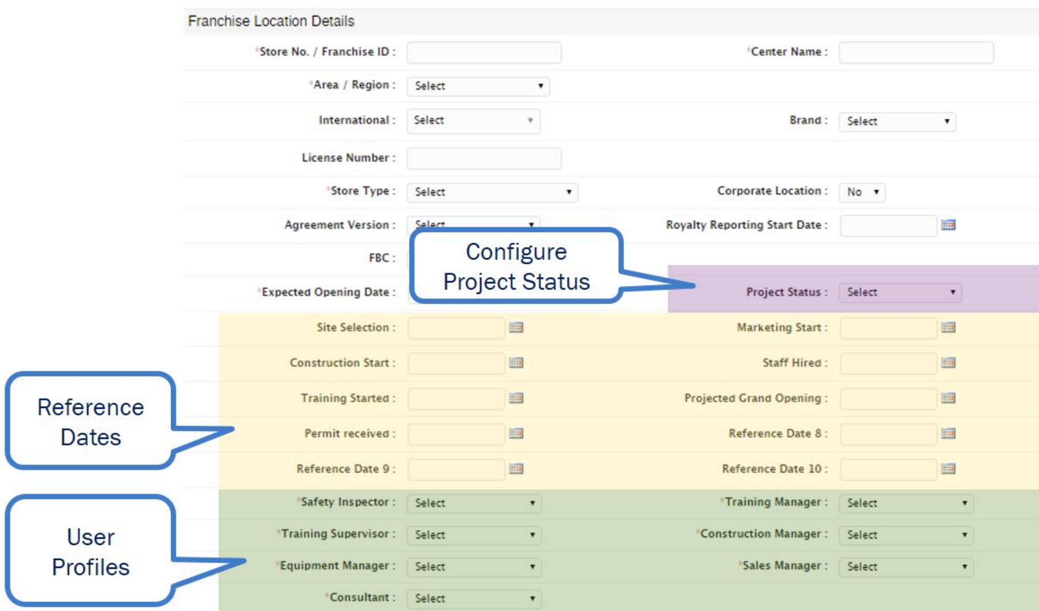
Appendix: Configuring Opener Yourself

Chances are, your FranConnect Implementation Team will configure the Opener module to your specifications, once your checklists and drop-down values are defined. If you find yourself configuring your own instance of opener, here's what you'll need to know.

The diagrams below show how the fields in Admin > Opener dialogs map to the user's experience. Blue shading marks the checklists that attach to new store openings. Green indicates WHO – responsible parties or store groupings. Yellow indicates WHEN things happen, including reminders. Purple indicates checklist-level data.

PRO TIP: Work your way up from the bottom when configuring Opener! The items in green (**Responsible Department, Customize Profiles** and **Manage Groups**) are drop-down fields in the blue Checklist tasks.

The items **Customize Profiles, Manage Reference Dates** and **Configure Project Status** are fields in the location data entry dialog, when users create locations in the Opener interface (either new or as part of moving them from the Sales module).



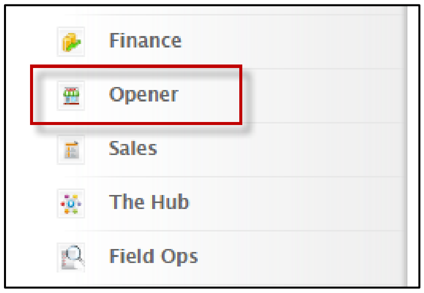
Creating Responsible Departments

Responsible Departments are used to indicate which group of people is responsible for a task on a checklist. For example, the Procurement Department might be responsible for ordering equipment, while the Construction Crew might be responsible for building a location's physical plant, and Accounting might need to set up an accounting link for payment of royalties. You can add as many groups as you need, and modify the names or delete them.

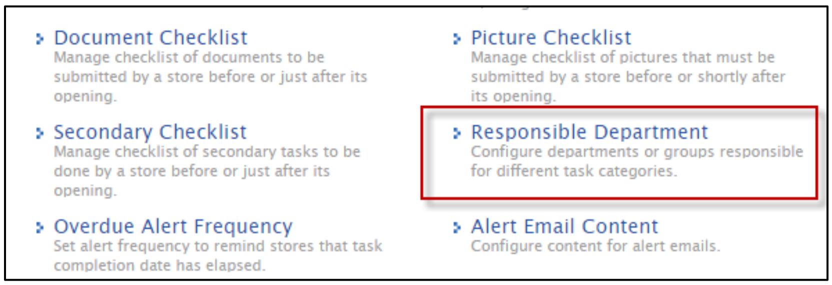
Note: Once a group has been assigned to a task, it can no longer be deleted. In order to delete the group, you'd need to unassign the group from each task it was associated with, then delete the unassigned group.

To add a Responsible Department:

1. From the Admin page, select **Opener** from the Navigation Panel.

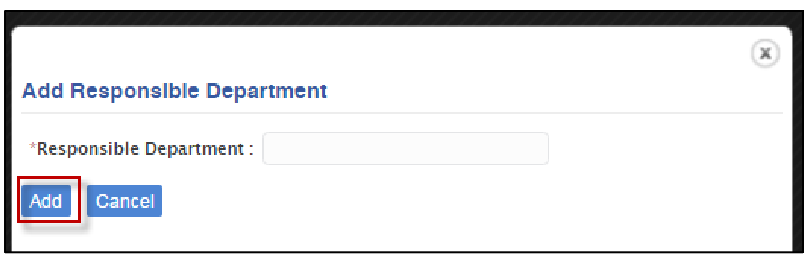


2. Select **Responsible Department.**



3. Click **Add More.**

4. Input the name for the department you want to add.
5. Click **Add.**



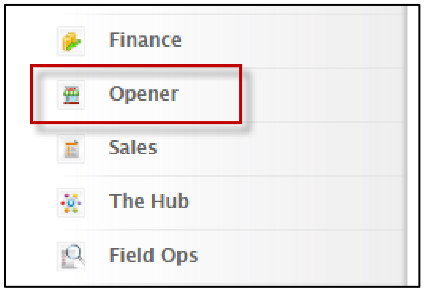
Creating Custom Profiles

Custom Profiles are created to represent the Franchisee job title associated with a particular task. In this way, when a pre-built task list is assigned to each store, the person who has that role at each store is then associated without the necessity of manually updating the checklist for each new location to choose a franchisee team member by name.

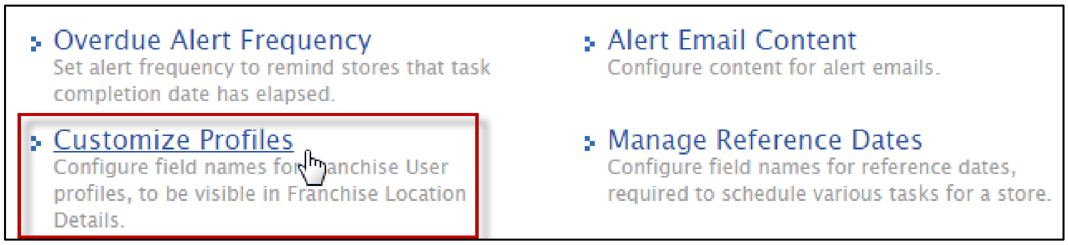
For example, the Location Manager is responsible for hiring new staff at each location, but each location has its own manager. If the task is associated with the position Location Manager, then as each location enters opener, and the Location Manager is named in describing the location, he automatically becomes associated with his tasks.

To add a Custom Profile:

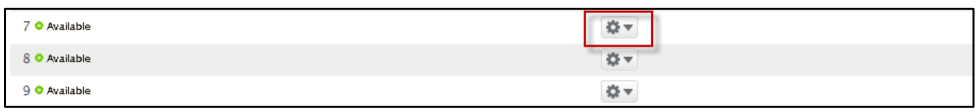
1. From the Admin page, select **Opener** from the Navigation Panel.



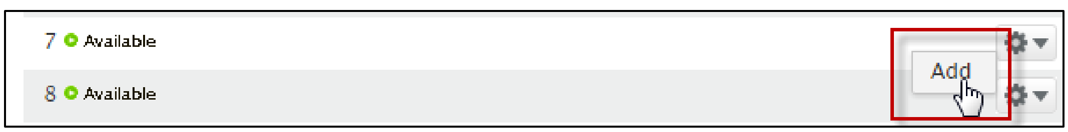
2. Click **Customize Profiles**.



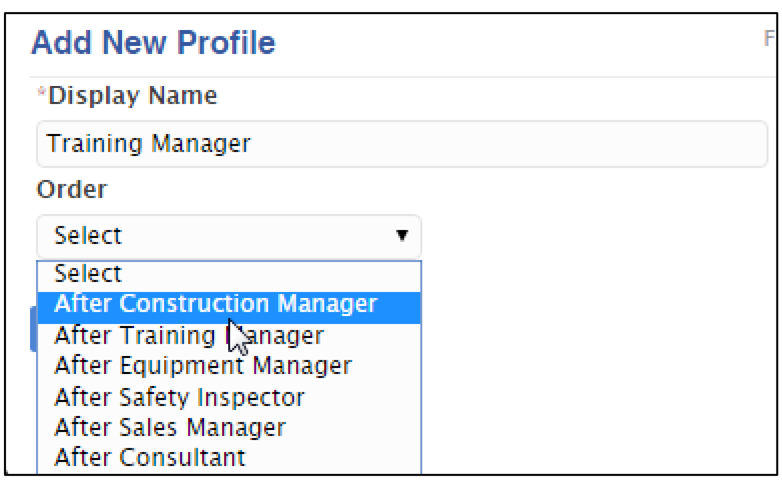
3. Click the action wheel next to an Available profile.



4. Click **Add**.



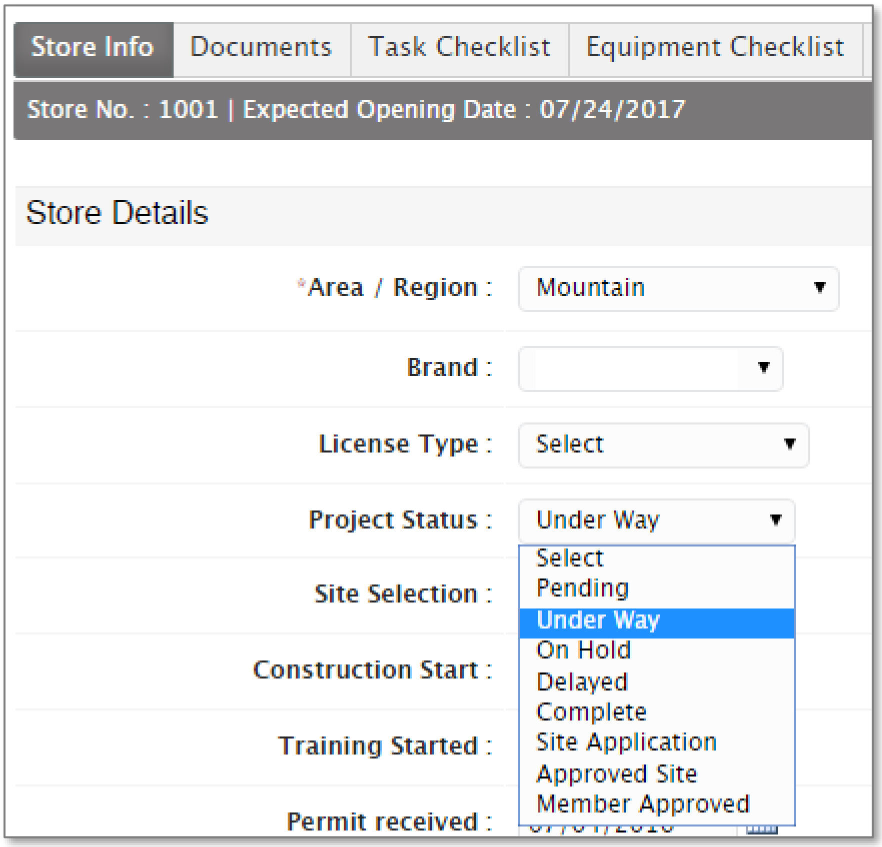
5. Input text for the name of the profile
6. Choose which profile you want the new profile to come after.



7. Click **Add**.

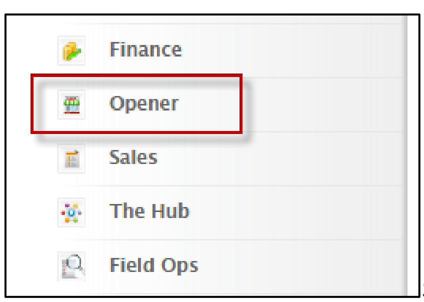
Creating a Project Status

In the description for each store, you can set the status of its opening project. To enable this, you can define several statuses that will appear in the Store Summary dialog tab in the Opener interface.



To add a Project Status:

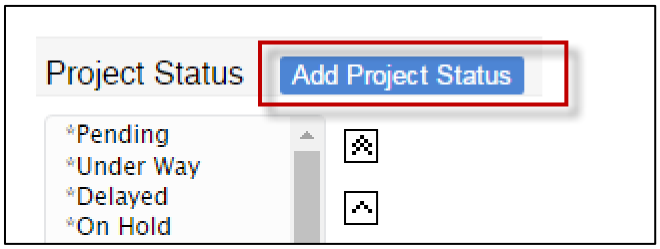
1. From the Admin page, select **Opener** from the Navigation Panel.



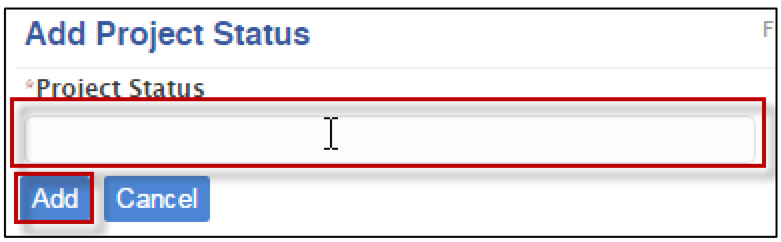
Ss

2. Click **Configure Project Status.**

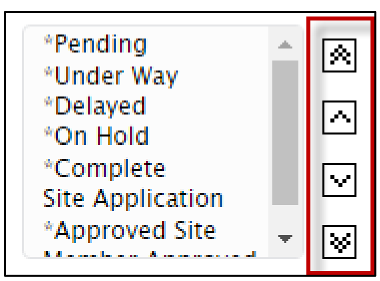
3. Select **Add Project Status.**



4. Input the Project Status you want to add into the text box.
5. Click **Add.**



6. Once you've added the Project Status it will appear in the list. To change the order in which it appears in the list click on the project status then use the up and down arrows to the right of the Project Status box.



7. Click **Change Sequence** to save the order.

Creating Store Types

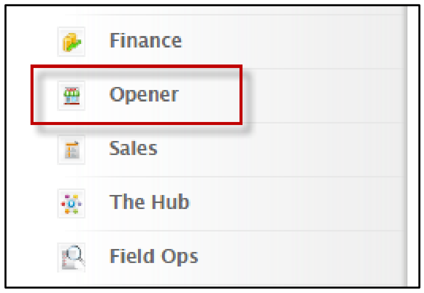
Stuff here about Store Types

Creating Groups

Often it is useful to view tasks grouped by similarity, rather than within the entire list. For example, there may be several tasks related to Construction, vs. tasks that are related to Licensure. There may be phases associate with a project, and certain tasks may belong in Phase 1 vs. Phase 2, etc.

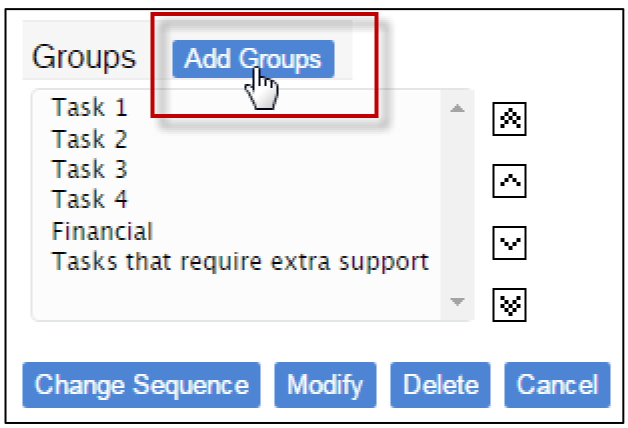
To add a group:

1. From the Admin page, select **Opener** from the Navigation Panel.



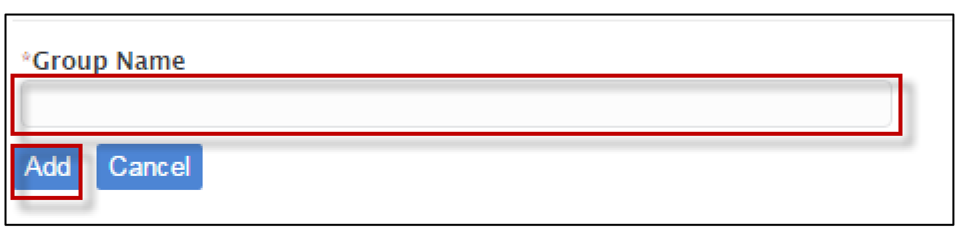
2. Click **Manage Groups.**

3. Select **Add Groups.**

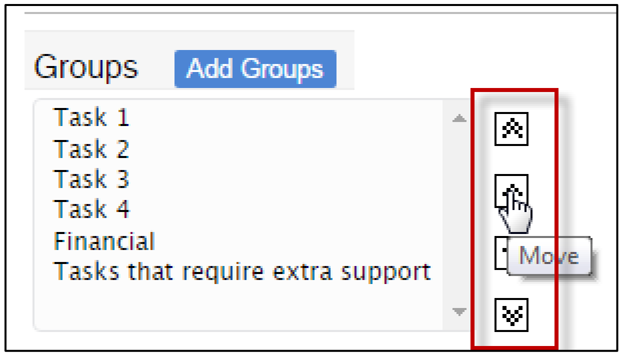


4. Input the Group you want to add into the text box.

5. Click **Add.**



6. Once you've added the Group it will appear in the list. To change the order in which it appears in the list click on the Group then use the up and down arrows to the right of the Group box.

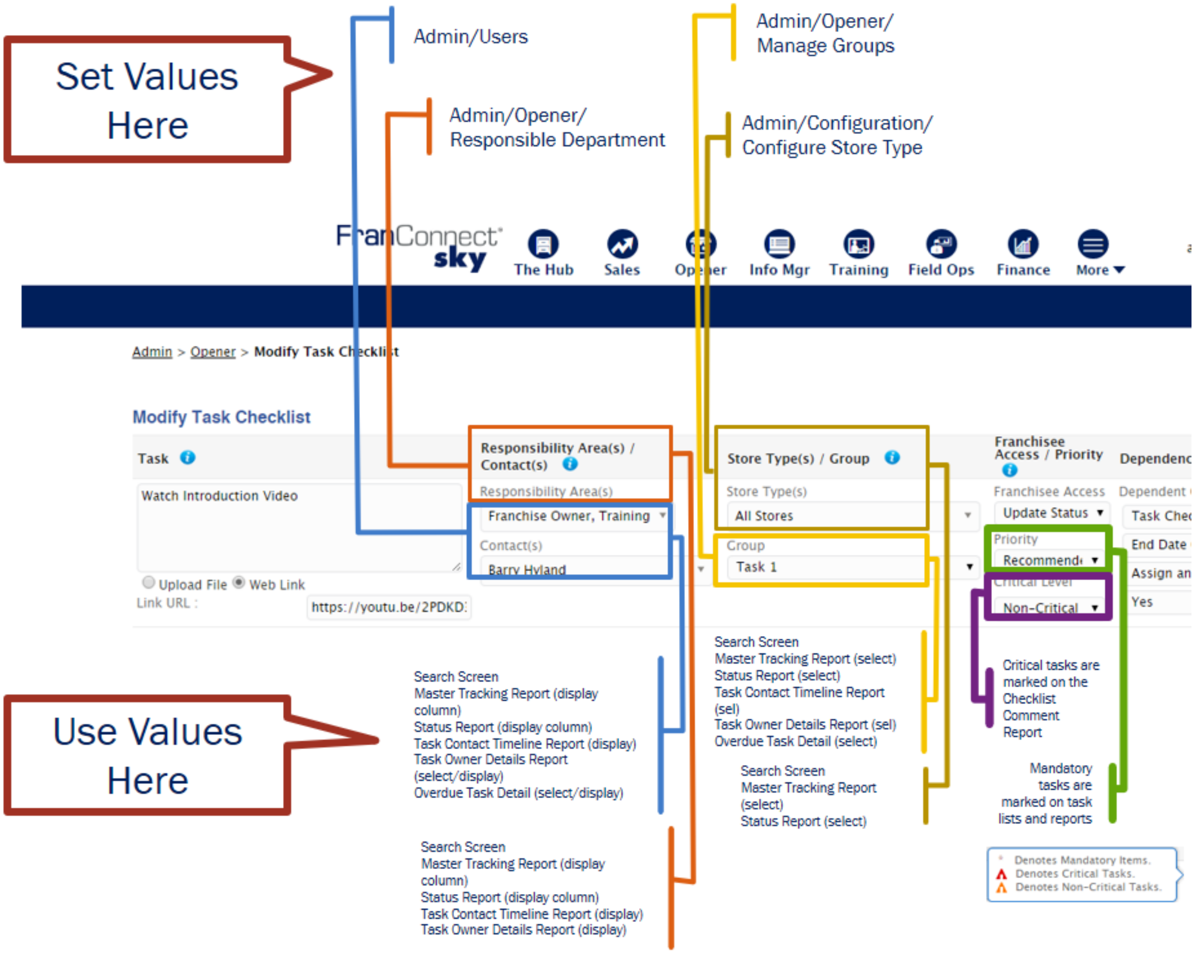


7. Click **Change Sequence** to save the order.

Creating Tasks

Checklists are made up of individual tasks. You can set individual tasks to have owners, due dates, and dependencies, and assign them to only certain store types, or group them by the type of task they are.

The diagram below shows the origins of the data for each field in a task, and the downstream use and effects of the field.



To add tasks:

1. Select **Admin** from the Admin panel.
2. Choose **Opener** from the left navigation bar of the Admin Panel.
3. Choose the checklist you want to edit from the selections in the center pane. Choices are **Task Checklist, Equipment Checklist, Document Checklist, Picture Checklist,** and **Secondary Checklists**. See About Checklist Templates for more information about choosing a checklist.
4. Click the blue **Add More** button to add another task.
5. In the Item Name text box, enter a brief description of the task.
6. Next, name the stakeholders in this task. There will be a department responsible for performing the action, and in addition, you can assign one or more individuals who will receive reminders and alerts about this task.
7. It's possible that only some stores need this task. In the next fields, we can specify in which cases we need to perform this step
8. If this task applies only to certain store types, select those on this screen.
9. If using task groups, set the Group this task belongs to.
10. Set the view permissions for Franchisees, i.e. whether they can only view, or also edit the task.
11. Set whether the task is Mandatory (user must complete this step in order to complete the checklist) or Optional.
12. Set the Critical Level of this task. The critical level is a criterion for grouping alert messages about the task.
13. Set any dependencies this task may have (see About Task Dependencies).
14. Set times for reminders to fire (see Using Task Start Reminders).

Implementation Checklist

Configure Project-wide Settings

- ☐ Configure the checklist display settings, either to show items in timeline view as Weeks Until Opening Date (EOD) or Weeks from the start of the project.
- ☐ Enter any values for Project Status. These are used in reports and dashboards. Typical values are **In Progress, On Hold, Behind Schedule, Complete**.

Configure "who" settings

- ☐ Enter Values for **Responsible Departments** – these are the groups of people that perform tasks. This value is used in reports and to filter tasks.
- ☐ **Customize Profiles** – enter the Job Titles of individuals who will be responsible for tasks, who will be designated by name for each franchise opening. Each profile will become a mandatory field in the Franchise Record.
- ☐ Define **Groups** if using them. Groups are used to display similar tasks together in the Tasks screens, and can be used to filter tasks.
- ☐ Define **Store Types**, if you have some tasks which apply only to certain stores.

Configure "when" settings

- ☐ Enter **Reference Dates** – these are fields where you can enter estimated or actual completion dates, and affect tasks that depend on them. You can also set the completion dates to be updated automatically on completion of tasks.
- ☐ Designate the **Overdue Alert Frequency** - the number of days after a task is overdue that an alert email will be sent.
- ☐ Configure **Alert Email Triggers** (if using), which will send escalating series of emails for different emails, based on their criticality.

Enter Task Lists

- ☐ EITHER complete the Task List Excel Template and provide to FranConnect to upload,

  OR enter the tasks in the appropriate list screens in **Admin > Opener**.

Set Automatic Update of Reference Dates

- ☐ Configure **Milestone Date Triggers**, which set dates for Reference Dates on completion of tasks.