

An abstract, vibrant illustration featuring a saxophone as the central element. The saxophone is rendered with bold black outlines and filled with various colors like purple, green, and orange. It is surrounded by dynamic, swirling lines and large, expressive paint splashes in shades of purple, green, and blue. The overall style is energetic and artistic, reminiscent of mid-century modern graphic design.

**Jazz Up**  
*your brand*

**EMERGING  
FRANCHISOR**

CON
FER
ENCE

NOVEMBER 16-18, 2016 | NEW ORLEANS, LA



**FRANCHISING**  
Building local businesses,  
one opportunity at a time.



**JOIN US** in New Orleans, LA, November 16-18, 2016 for IFA's fourth annual Emerging Franchisor Conference. Designed for franchisors looking to connect, innovate and evolve their brands to the next level, this conference is a must-attend. You'll leave with valuable information and insights from leading franchisors that you will bring back to your business to help you grow and succeed in the future.

#### WHO SHOULD ATTEND & WHY:

Franchise operations executives, CEOs, COOs, Presidents, franchise development executives, franchise marketing experts, franchise relations specialists and anyone looking to grow their business!

- Discover opportunities unique to your growing franchise system.
- Be a part of an interactive learning atmosphere where attendees are engaged with one another.
- Listen as experienced moderators show you the many ways this conference can and will address the challenges you face in your business, making sure you get the most out of your time in New Orleans.

#### NEW FOR 2016!

This year's Emerging Franchisor Conference will feature a bonus, pre-conference session titled **"7 Secrets to Dynamic Franchise Cultures."** This bonus session will address what it means to have a dynamic culture, what it takes to build that culture and how you go about nurturing a culture with passionate franchisees. You can earn 75 CFE Education Credits by attending this session. This session is free to all registrants.

## Thank You to Our SPONSORS



## Wednesday, November 16

1:00 pm – 6:00 pm

**Registration Desk Open**

1:30 pm – 3:00 pm

**Bonus Pre-Conference Session**

### 7 Secrets to Dynamic Franchise Cultures

At its best, franchising is a platform for prosperous supportive partnerships resulting in profitability and long-term growth. With effort on both sides, franchising is a win, win, win – for the franchisee, franchisor and consumer. During “7 Secrets to Dynamic Franchise Cultures” you will learn the important steps to setting the foundation of your system and what is needed for long term success.

In this bonus session, we will discuss what it means to have a dynamic culture, who it takes to build that culture and how you go about nurturing a culture with passionate franchisees. Once you implement the 7 Secrets, your system will be positioned to better manage potential franchisee discord and will be on the path to fostering stronger relationships.

**Speaker:** **Susan Beth, CFE**, Operating Partner, NRD Capital

3:30 pm – 5:00 pm

**Welcome and Keynote Presentation**

### The Foundations and Economics of Building a Franchise System

Join a wide-range of franchise executives for a candid discussion focused on:

- What does it take to start a franchise business?
- What do you need to get started?
- Hear war stories from our panel members. What did they learn?
- What are the true investments of starting a franchise?
- How do you pick the right franchisees in the first phase of building your franchise system? What do these franchisees look like?

**Speakers:** **Shelly Sun, CFE**, CEO & Co-Founder, BrightStar Franchising LLC; **Steve Murphy**, President of Franchising, Winmark Corporation; **Paul C. Wolbert**, COO, Wholesome Tummies; **Michael Haith**, CEO, Teriyaki Madness

5:00 pm – 6:00 pm

**Problem Solving Exercise**

What is the top issue keeping you up at night that you want to address during this conference? In small groups of approximately 8-10 attendees, experienced moderators will listen to what you want addressed to compile a list of the take-aways you need to go home with to make your investment in the Emerging Franchisor Conference worth your time and money. All attendees will be made to feel welcome and comfortable while discussing the challenges they face and solutions they need to drive value in their attendance at this show.

## Thursday, November 17

8:00 am – 5:00 pm

**Registration Desk Open**

8:00 am – 8:30 am

**Continental Breakfast with Table-Top Exhibitors**

8:30 am – 9:30 am

**General Session**

### Don't Let Financing Scare You

Learn from Lenders and Franchisors on how to secure financing for your franchise candidates in the current lending environment

9:45 am – 10:45 am

**General Session**

### Building a Rockstar Team - The Untold Secrets

FDD hot off the press and your first few franchisees in the works, now what? No, you will not be able to do it all yourself for very long. As an emerging franchise system, you will soon be expected to provide world class onboarding, marketing, operations, and technology support. The right people at the right time can make or break your initial growth phase. This session will cover the untold secrets on how to grow a rockstar team while balancing short and long term profitability. There will be real-world examples as well as practical takeaways and planning tools.

10:45 am – 11:00 am

**Refreshment Break with Table-Top Exhibitors**

11:00 am – 12:00 pm

**Concurrent Sessions**

#### 1. Lead Generation – The Silver Bullet is Really a Silver Shotgun Shell

- Strong Unit Performance? Check
- Strong Validation? Check
- Strong Franchise Development Process in Place? Check

If you have these three items covered, lead generation is the next step in your quest to grow your brand. But note, there no such thing as a “one size fits all” lead generation plan or an “easy button” to push. Successful lead generation plans are all about meeting your target candidates where they are and meeting them often. A multi-dimensional approach is usually mandatory. Join us to hear from a panel of experienced franchise development professionals who have developed strategies that work and can provide real-time experience to help you develop and implement a plan that can work for your brand.

**Speakers:** **Paul Pickett**, Chief Development Officer, Wild Birds Unlimited, Inc.; **Michael Mabry**, Director of Franchise, MOOYAH Franchise LLC

## 2. Unit Level Economics is a Difference Maker for Emerging Franchisors (Driving Profitability through Benchmarking & Performance Groups)

Driving profitability through benchmarking and performance groups is a critical aspect to the sustainability of franchise systems. The sooner emerging franchisors learn how to utilize financial metrics, efficient communication, accountability and utilization of industry statistics and benchmarks, the more likely they will achieve sustainable success. Your system's EBIDTA, profitability and Franchisor/Franchisee relationships depend on transparent and accurate unit level economics.

Speaker: **Brian Schnell, CFE**, Partner, Faegre Baker Daniels, LLP

12:00 pm – 1:45 pm **Luncheon and Featured Presentation**

### Local Marketing: Leveling the Playing Field

- Defining the Market
- Balancing National and Local Efforts
- Developing the Tools
- Setting Priorities
- Monitoring Performance
- Measuring Outcomes

Speakers: **Dan Broudy**, CEO, Clayton Kendall; **Josh York**, Founder & CEO, GYMGUIZ

2:00 pm – 3:00 pm **Concurrent Sessions**

### 1. Sourcing, Profiling, Qualifying Candidates and Closing the Sale

- How to more accurately score your lead generation sources.
- How to take the guess work out of qualifying your candidates.
- How to enhance the prospect's experience in learning about your brand and opportunity.
- How to determine which of your candidates will actually reach a decision, one way or the other.
- How to get them to yes, (or no) in a more timely manner.

Speakers: **Stan Friedman, CFE**, President, FRM Solutions; **Josh Wall, CFE**, VP, Franchise and Strategic Development, Christian Brothers Automotive

### 2. Use of Financial Performance Representations in the Franchise Sales Process

This program will provide guidance on the use of financial performance representations in the franchise sales process. The presenters will examine the key provisions in the recent draft NASAA FPR Commentary and discuss how it might impact the FPRs of emerging franchise systems in the US.

This session will also cover:

- The definition of a FPR
- Federal and state laws governing FPRs, including exemptions
- The use of FPRs in franchise sales advertising

- Types of FPRs, including subsets
- Best practices to ensure franchise sales compliance

Speaker: **David W. Oppenheim**, Shareholder, Greenberg Traurig, LLP

3:00 pm – 3:15 pm **Refreshment Break with Table-Top Exhibitors**

3:15 pm – 4:15 pm **General Session**

### Your Digital Marketing Toolkit – Incorporating Online Platforms into Your Marketing Strategy

From Facebook to retargeting and everything in between, there are multiple platforms you need to be familiar with in order to grow your online presence, expand your digital audience and inspire your consumers to take action.

Join us as we not only break down the top digital marketing techniques, but connect the dots of how they all work together to create a consistent stream of business for your franchise.

In this session, you will:

- Learn the most effective marketing strategies for your business in an everchanging digital environment.
- Understand the best usage for each of the digital marketing platforms and common mistakes to avoid.
- Equip your business to leverage the digital strategies that together, work most effectively.

Speaker: **Martin McDonald**, Senior Director, Strategic Sales & Development, G/O Digital

5:00 pm – 6:30 pm **Reception with Table-Top Exhibitors**

## Friday, November 18

7:30 am – 3:30 pm **Registration Desk Open**

7:30 am – 8:15 am **Continental Breakfast with Table-Top Exhibitors**

8:15 am – 9:45 am **General Session**

### Changing the Narrative with a Franchising Awareness Program: @OurFranchise

There is a great misunderstanding about franchising among the public. The public is not aware of franchising's contributions to the U.S. economy, the value of the franchise model to communities here and across the globe, and why it is important for policy makers to support the traditional definition of franchising. Those who are attacking franchising are trying to redefine the franchise model. IFA Chair Aziz Hashim, a multi-unit, multi-brand franchisee and founder and general partner of NRD Capital, has been leading the charge to change the narrative

about franchising. Through a new industry-wide awareness program, **@OurFranchise**, you will learn about new digital tools available to help you promote your franchise brand, connect with local customers and recruit franchisees.

**Speaker:** **Aziz Hashim**, Managing Partner, NRD Capital & Chairman, International Franchise Association

## Joint Employer Liability – A Fundamental Attack on Franchising

Last year, a Federal government ruling overturned its longstanding “joint employer” standard, used to determine when two separate employers share responsibility and liability for the same employee. Under the new, extremely broad standard, almost any franchisor-franchisee relationship could be found to be joint employers. Come learn how expanded joint employer liability – a once obscure labor law issue that has become a fundamental attack on franchising – is changing operations and decision-making for leading franchise brands.

**Speakers:** **Michael J. Lotito**, Co-Chair Littler’s Workplace Policy Institute and Shareholder, Littler Mendelson; **Lynn Berberich**, Owner, BrightStar Care of Baltimore City, MD

9:45 am – 10:15 am **Refreshment Break with Table-Top Exhibitors**

10:15 am – 11:15 am **General Session**

## Utilize Sensory Marketing to Boost Sales & Grow Your Business

Learn how to utilize sensory marketing services that speak to your customer’s senses to create memorable experiences, drive sales, and enhance your marketing to increase your bottom line. We’ll talk about the importance of scalability, streamlining the setup, how to find the best of breed in partners, marketing integration, and more.

Join us as we dig into the questions you’ll want to consider when it comes to creating an engaging, and memorable atmosphere that will create loyal customers ready to buy again.

**Speaker:** **Fred Macciocchi**, Regional Developer, Amazing Lash Studio Franchise LLC

11:30 am – 12:30 pm **Concurrent Sessions**

### 1. Ensuring Customer Loyalty and Brand Integrity Across Your Growing Organization

You’ve developed a unique franchise concept that is marketable and you’re ready to grow. But a well thought out plan needs the right systems and processes to execute. Learn how the most successful franchise systems are using customer feedback to:

- Hold staff and franchisees accountable for customer loyalty
- Maintain their brand image
- Support local marketing efforts

During this session, you’ll hear from industry veterans that will share their best practices and lessons learned along the way.

### 2. Training, Onboarding and Joint Employment: How to Be Effective & Responsible

From signing to opening, first dollar to profit, franchisees need to start off strong and climb steep ramps. In this session, we will discuss tactics that can get your franchisees and your system to profitability faster, while helping field staff avoid the joint employment land mines.

**Moderator:** **Mary Ann O’Connell, CFE**, President, FranWise  
**Speakers:** **Danessa Itaya**, Vice President, Maid Right Franchising, LLC; **Amy Cheng**, Partner, Cheng Cohen LLC

12:45 pm – 2:15 pm **Boxed Luncheon with Roundtables**

Sit at a table with 8-10 of your fellow attendees and share ideas, challenges and solutions focused on a specific topic assigned to each table. This is an opportunity to have an open forum discussion with a small group and discuss mistakes, lessons learned and success stories.

2:30 pm – 3:30 pm **Closing General Session**

## Addressing Hurdles on the Path to Success

- How do you have the tough conversations? Communicating with your franchisees, your team, your partners.
- How do you stay disciplined while growing a system?
- What’s next? How do you implement what you learned?

**Moderator:** **Susan Beth, CFE**, Operating Partner, NRD Capital  
**Speakers:** **Nancy Bigley, CFE**, CEO, Bottle & Bottega;  
**Joe Lindenmayer, CFE**, Vice President, California Closet Company, Inc.

3:30 pm **Conference Adjourns**



# THANK YOU

## *To Our 2016 EFC Task Force Members*

**SUSAN BETH, CFE**  
Operating Partner, NRD Capital

**CRAIG CECCANTI**  
CEO, Pinot's Palette

**SHANE EVANS**  
Co-Founder, President & COO, Massage Heights Corporate LLC

**MICHAEL HAITH**  
CEO, Teriyaki Madness

**PAUL E. PICKETT**  
Chief Development Officer, Wild Birds Unlimited, Inc.

**PAUL C. WOLBERT**  
COO, Wholesome Tummies

## ICFE CREDITS



You will earn double the credits toward the completion of the Certified Franchise Executive (CFE) accreditation by attending the Emerging Franchisor Conference. Earn 600 Education Credits for EFC and 75 Education Credits for the pre-conference session.



## HOTEL INFORMATION

The 2016 Emerging Franchisor Conference will take place at the JW Marriott New Orleans in New Orleans, LA. You may reserve your hotel room by [clicking here](#) or calling 877-622-3056. Our room rate for a standard room is \$216 per night. The deadline for making a reservation is October 25, 2016, or when the IFA room block is filled, whichever is first. Once the room block is sold out, reservations will be accepted on a space availability basis at the group rate.



# REGISTRATION FORM



**NOVEMBER 16-18, 2016 // JW MARRIOTT // NEW ORLEANS, LA**

Please complete one form per person. The pre-registration deadline is **November 3**. After this deadline, an additional on-site registration fee of \$50 will apply. To register online [Click Here](#). Please email Katie Neumann at [events@franchise.org](mailto:events@franchise.org) with any questions.

Full Name \_\_\_\_\_  
Title \_\_\_\_\_ Nickname for Badge \_\_\_\_\_  
Company \_\_\_\_\_ Number of Units \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_  
Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

☐ Check here if you wish to receive emails about IFA events and issues of interest.

☐ Check here if you require special assistance to participate. Please specify \_\_\_\_\_

## REGISTRATION FEES

**\*\*Please select your registration fee below. As a reminder this program is for Franchisor Members and Franchisee Members only. Only Supplier Members who are sponsoring the event are able to attend. Your registration fee includes: course instruction and materials, two continental breakfasts, two luncheons, one networking reception and multiple refreshment breaks. Course materials from our speakers will be available on a flash drive when you check in at our registration desk.**

Please mark the appropriate box to indicate your participation and fees (registration fees are per person):

- ☐ IFA Franchisor or Franchisee Member ..... \$450 \$ \_\_\_\_\_  
☐ Additional Franchisor/Franchisee Attendee from the Same Company (IFA Member)..... \$400 \$ \_\_\_\_\_  
☐ Non-Member (Franchisors/Franchisees) ..... \$850 \$ \_\_\_\_\_  
☐ Program Sponsor ..... Complimentary Upon Approval

GRAND TOTAL \$ \_\_\_\_\_

**HOTEL INFORMATION:** IFA has reserved a block of rooms at the JW Marriott New Orleans. To make a reservation, [click here](#) or call 877-622-3056. Our room rate for a standard room is \$216 per night. The deadline for making a reservation is October 25, 2016, or when the IFA room block is filled, whichever is first. Once the room block is sold out, reservations will be accepted on a space availability basis at the group rate.

**CANCELLATION POLICY:** Full refunds (minus a \$50 administration fee) will be granted for registrations canceled at least 14 days in advance of the seminar you are attending. A 50% refund (minus a \$50 administration fee) will be provided for registrations canceled 7-14 days in advance. No refunds will be permitted for cancellations less than 7 days in advance or for "no shows." All requests for cancellations must be made in writing to [events@franchise.org](mailto:events@franchise.org). Substitutions are permitted at any time.

## PAYMENT METHOD

- ☐ Check Enclosed Payable to "IFA" (Federal Tax ID #36-6108621) ☐ Credit Card: (circle one) Visa Mastercard AMEX Discover

Account # \_\_\_\_\_ Expiration \_\_\_\_\_

Card Member Name \_\_\_\_\_ Signature \_\_\_\_\_

Complete and return payments to:



**Emerging Franchisor Conference**  
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