



FRANCHISING
Building local businesses,
one opportunity at a time.



EMERGING FRANCHISOR

NOVEMBER 18-19, 2015 | MIAMI, FL

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Register at www.franchise.org/emerging-franchisor-conference

LEADERSHIP LESSONS TO FUEL YOUR GROWTH

Join us in Miami, FL this November 18-19 for IFA's third 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.
- Put your skills to the test by taking part in a case study to showcase best practices learned and make your brand grow.
- Roundtable Discussions: Sit at a table with 8-10 of your fellow attendees and share ideas, challenges and solutions focused on a specific topic assigned to that table. This is an opportunity to have an open forum discussion with a small group of franchise executives and discuss mistakes, lessons learned and success stories. This session is all about engagement! Everyone participates at the table to get the most out of the discussions which are led by a franchise expert on subjects such as franchise development, technology, operations, marketing and more!
- Table Top Exhibits: Attendees are invited to meet with representatives from companies offering products and services for the franchising industry. In addition to the tabletop exhibits, a networking reception with hors d'oeuvres and drinks will allow attendees to meet speakers and exhibitors and further discuss concepts learned during the seminars.

THANK YOU TO OUR SPONSORS



WEDNESDAY, NOVEMBER 18

7:30 am Registration Desk Open

7:30 am – 8:15 am Continental Breakfast with Table Top Exhibits

8:15 am – 9:30 am Welcome and Opening General Session



Conference Moderator: **Susan Beth, CFE**, Operating Partner, NRD Capital



Orange Is the New Gold: Lessons Learned From a Serial Entrepreneur Who Transformed a Simple Workout to a Global Franchise

David Long, Founder & CEO, Orangetheory Fitness

9:45 am – 10:45 am Getting Your Franchise System Ready to Grow

5 Critical Pillars to Support Your Company's Future

- Investing In a Solid Structure: Creating an internal structure as a solid foundation on which to build.
- Accurately Planning Growth Rate: Knowing HOW to grow: What rate of growth is right for YOUR company.
- Assuring Quality Control: Protecting your future by maintaining that which made your concept a success.
- Leveraging Technology: Knowing what you need to do to keep your brand relevant in today's ever-changing marketplace.
- Creating and Spreading Your Message: Keys to market and maintain your brand consistently and effectively.

Moderator: **Shannon Wilburn, CFE**, CEO & Co-Founder, Just Between Friends

Speakers: **Craig Ceccanti**, CEO, Pinot's Palette; **Shane Evans**, Co-Founder, President & COO, Massage Heights Corporate LLC.; **Goeff Goodman**, President, Orange Leaf Frozen Yogurt

10:45 am – 11:15 am Refreshment Break with Table-Top Exhibitors

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CONFERENCE

11:15 am – 12:15 pm Concurrent Sessions

1. Collaboration: It's Not Just a Concept It's How You Build Your Franchise Empire

- How do you define collaboration within a franchise system? Give examples of collaboration and contrast with command and control leadership in a franchise system ("you must do what I say because the franchise agreement requires you to").
- In many instances collaboration breaks down due to breakdowns in communication. How can we avoid communication breakdowns?
- How do franchisors effectively lead their organizations and networks through system wide change that is endorsed and implemented effectively rather than resisted by franchisees at the unit level?
- What best practices can the franchise leadership team execute to ensure the results achieved are sustainable rather than temporary? What separates franchisors who talk about the importance of unit level economics and those who have a passion for it and obsess over the franchisees' bottom line?
- How do you define your brand and your brand promise—it's more than a slogan or marketing campaign; it's your DNA. What does "undying devotion to your brand" mean to you? Discuss examples where it has made a difference to your brand customers.

Speakers: **Brian Schnell, CFE**, Partner, Faegre Baker Daniels LLP and **Mike Reynolds**, CEO, Rock and Brews Holdings, Inc.

2. Use of Financial Performance Representations In the Franchise Sales Process

The presenters will examine critical issues involving financial performance representations which emerging franchisors must understand when engaging in franchise sales in the United States. The session will cover the following topics:

- What is an FPR?
- Federal and State laws governing FPR's.
- Can you sell franchises without an FPR?
- Developing an FPR that works for your business.
- Best practices to ensure franchise sales compliance.

Speakers: **Alan Greenfield**, Shareholder, GreenbergTraurig, LLP; **Brian O'Donnell**, SVP, Franchise Sales, AAMCO Transmissions, Inc.

12:30 pm – 2:00 pm Luncheon and Featured Presentation

How a Comprehensive Branded Merchandise Program Can Transform Every Aspect of Your Business

Use technology to leverage your spend, enhance your brand, manage your budget, and promote compliance.

Speakers: **Sol Glastein**, Regional Developer, Massage Envy and **Daniel Broudy**, CEO, Clayton Kendall

THURSDAY, NOVEMBER 19

2:15 pm – 3:15 pm

General Session

Financing the Brand: The “How To” Guide to Providing Franchise Financing to Fuel Your Growth

Be an active participant in this panel session featuring experts and a guest franchisor who has been where you are now. They will share their best advice on:

- Funding insights and resources to empower you and your franchisees to reach your growth goals.
- Building a foundation for growth through key partnerships.
- The latest funding strategies to utilize now for future success.

Moderator: **Rocco Fiorentino, CFE**, President & Chief Executive Officer, Benetrends Financial

Speakers: **Dave Grams**, Chief Credit Officer, Benetrends Financial; **Heather Harris**, President, CycleBar; **Robert McQuillan**, VP, Franchise Development, Hand & Stone Massage and Facial Spa

3:15 pm – 3:45 pm

Refreshment Break with Table-Top Exhibitors

3:45 pm – 4:45 pm

Concurrent Sessions

1. The High Tech/High Touch Process of Proper Selection

As things start, is as things go. Properly managing expectations, both those of the candidates as well as your own is key. Having a structured licensing system and managing it efficiently, intelligently and getting the right candidates through the funnel and decision day, quickly and efficiently, without missing a beat.

Speakers: **Stan Friedman, CFE**, President, FRM Solutions; **Kevin Drudge, CFE**, VP of Franchise Development, AdvantaClean Systems, Inc.

2. Training and Manuals: What’s the Difference?

- Learn how to blend two separate tools for one great result Education vs Training.
- Define the material for more efficient classes training ideas for the new and seasoned franchisees.
- From initial training through Grand Opening to exit strategies, what works when?
- What’s Important and why? Key topics you might be missing.
- Tools and Efficiencies: Do a lot more with less.

Moderator: **Mary Ann O’Connell, CFE**, President, FranWise®

Speakers: **Mike Skitzki, CFE**, Vice President, TITLE Boxing Club; **Paul Pickett**, VP of Franchise Development, Wild Birds Unlimited, Inc.

5:00 pm – 6:30 pm

Reception with Table-Top Exhibitors

7:30 am

Registration Desk Open

7:30 am – 8:15 am

Continental Breakfast with Table Top Exhibitors

8:15 am – 9:45 am

General Session

Beware of the Four-Letter Word – NLRB! How To Support Your Franchisees With Joint Employer Issues Looming

We’ve heard extensively from the IFA and other news sources that the NLRB’s joint employer lawsuits run the risk of killing the franchise business model. During this general session case study, hear directly from a franchisor on how they are working with their franchisees to continue to provide the extensive support necessary without crossing the “line.” You’ll learn that success is grounded in the same principles as before we began hearing the dreaded four-letter-word – collaboration, leadership and trust.

Moderator: **Lorne Fisher, CFE**, CEO/Managing Partner, Fish Consulting

Speaker: **Mike Rotondo**, CEO, Tropical Smoothie Cafe

9:45 am – 10:15 am

Refreshment Break with Table Top Exhibits

10:15 am – 11:15 am

General Session

Bringing Your Digital Audience Through Your Front Door

What’s the secret sauce for bringing franchise consumers from online to in-store? From localized digital marketing to creative content and ads, the right messaging can drive in-store revenue in a big way. In this session, we’ll use real life examples of effective digital marketing strategies that will have maximum impact at your franchise location.

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

11:30 am – 12:30 pm

Concurrent Sessions

1. The 5 Things Your Customers Care About Most

If 5,000,000 prospective customers could tell you exactly what was on their minds, would you listen?

This informative session will give you an inside glimpse into the results of millions of customer loyalty surveys performed by leading B2B and B2C service companies. It will shed light on why customers try a brand and stick with it, or eventually move on. Most important, it will provoke discussions about how customers perceive the brands they love, and the things they expect businesses to do to earn their loyalty.

Whether you are a senior manager, an operations professional, or a marketer, you will gain new insights about what to do today to keep your brand growing in this fast-changing, competitive marketplace.

Speaker: **Richard Thomas**, EVP Sales and Marketing, Listen360, Inc.

2. Building Your Team: I Have Franchisees and Customers, Now What?

Evolving from an emerging brand to a system that provides a full array of support, including marketing programs, franchisee compliance and unit level mentoring requires a team of dedicated professionals who understand the challenges of building a system that is sustainable and aligns with franchisor and franchisee objectives. The panelists will share experiences in hiring a professional staff dedicated to building and implementing operational, marketing and sales systems.

Topics covered include:

- Structuring your operational team: Should you consider regional or centralized support?
- How to provide excellent support and set appropriate expectations.
- What are the top three highest priority operational initiatives for emerging brands?
- Must have requirements for emerging franchisor employees.

Moderator: **Robin Gagnon**, Vice President, We Sell Restaurants

Speakers: **Steve White**, Chief Operating Officer, PuroClean, Inc.; **Barry Falcon**, CFE, Partner, Board Member, Concrete Craft

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 that table. This is an opportunity to have an open forum discussion with a small group franchise executives and discuss mistakes, lessons learned and success stories. This session is all about engagement! Everyone participates at the table to get the most out of the discussions which are led by a franchise expert.

2:30 pm – 3:30 pm

Closing General Session – Ask the Experts

Continuous Innovation in a Growing System

- How Do You Keep Evolving?
- How Do You Stay Ahead of the Competition?

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

Speakers: **Scott Abbott**, President, Five Star Bath Solutions;

Kathleen Gilmartin, President & CEO, Caring Brands

International; **Mike Lester**, President, The Melting Pot Restaurants, Inc.

3:30 pm Conference Adjourns



THANK YOU

TO OUR CONFERENCE PLANNING TASK FORCE MEMBERS

SCOTT ABBOTT

President, Five Star Bath Solutions

SUSAN BETH, CFE

Operating Partner, NRD Capital

CLARISSA BRADSTOCK

CEO, Any Test Franchising, Inc.

ROCCO FIORENTINO, CFE

President & Chief Executive Officer, Benetrends Financial

LORNE FISHER, CFE

CEO/Managing Partner, Fish Consulting

MARY ANN O'CONNELL, CFE

President, FranWise®

BRIAN SCHNELL, CFE

Partner, Faegre Baker Daniels LLP

SHANNON WILBURN, CFE

CEO & Co-Founder, Just Between Friends

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 this year!

INTERCONTINENTAL MIAMI



HOTEL INFORMATION

IFA has reserved a block of rooms at the InterContinental in Miami. To make your reservation click [here](#) or call 1-800-327-3005 and ask for the IFA rate of \$209 per night. The deadline for booking your room at the IFA rate is October 18, 2015 (or when the room block sells out, whichever comes first).

A FEW FUN FACTS TO REMEMBER ABOUT MIAMI!

- Miami Beach's Art Deco District contains the world's largest collection of Art Deco Architecture (800+ buildings)
- Miami Beach is a man-made island that was once a Coconut Grove Plantation.
- Miami is home to the world's only Everglades eco-system, made famous in Marjorie Stoneman Douglas' book *The River of Grass*.
- Miami is home to 150+ ethnicities and 60+ languages



REGISTRATION FORM




NOVEMBER 18-19, 2015 /// INTERCONTINENTAL MIAMI /// MIAMI, FL

Please complete one form per person. The pre-registration deadline is **November 6**. After this deadline, an additional on-site registration fee of \$50 will apply. Register online at: <https://member.franchise.org/ebusiness/Meetings/Meeting.aspx?id=5085>

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 and multiple refreshment breaks. Course materials will be distributed by e-mail before the event and available on-site for pick-up on a flash drive.**

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

- ☐ IFA Franchisor or Franchisee Member \$450 \$ _____
☐ IFA Franchisor/Franchisee Member Additional Attendees \$400 \$ _____
☐ Non-Member Franchisors/Franchisees \$850 \$ _____
☐ Program Sponsor Complimentary

GRAND TOTAL \$ _____

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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 hmurtaza@franchise.org. Substitutions are permitted at any time.

PAYMENT METHOD

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