THE FRANCHISOR JOURNEY: A SYSTEMATIC GROWTH APPROACH

Summer 2023 Session:  July 27th – 29th
OVERVIEW

Being a franchisor comes with incredible responsibility for the brand, the franchisees and ultimately the customers of the network. This course will examine each of the stages a franchisor must go through as it develops a valued brand, a powerful network, and a cadre of loyal customers along the way. We’ll review the challenges, the strategies and the models that support a successful franchisor journey.

OBJECTIVES

- Understand the key elements in the franchisor journey
- Evaluate the differences between the franchisor and the franchisee in their roles and responsibilities
- Create a framework for having a healthy and productive experience as a franchisor
- Learn how to identify the transitions from one stage of growth to the next, and to effectively manage through each transition

PARTICIPANT BENEFITS

Gain knowledge and skills | Build social capital | Enhance your career

- Relevant learnings you can immediately apply to working within a franchise system
- World-class curriculum delivered by Daniels, Liniger Center on Franchising faculty
- Improve marketability & add franchise education to your resume
- Establish life-long connections with franchise professionals from a variety of industries
- Earn Certified Franchise Executive (CFE) credits from the ICFE

Those enrolled in the IFA Certified Franchise Executive™ program will receive:

- 9 CFE Education credits for the 10-hour online course (applicable once)
- 16 CFE Education and 3 CFE Participation credits for “The Franchisee Journey” three-day classroom course.
WHO SHOULD ATTEND

- Every franchisee to fully understand franchising from the franchisor perspective.
- All individuals seeking to learn about franchising and the stages of the franchise journey from the franchisor’s perspective
- Anyone who is considering franchising a business
- Franchise professionals who wish to develop broader knowledge and better competency in franchise network formation and management
- Those seeking credit toward the IFA Certified Franchise Executive program

MODALITY & DURATION

On-line & In-Person at University of Denver campus

The course starts with a required on-line session “Introduction to Franchising” (only required to be taken once but must be completed prior to attending any of the in-person franchise courses) that introduces the franchise model and lays out the foundational information needed for attending the three-day in-person session.

- The on-line session will take approximately 10 hours to complete and can be completed in stages. Access will be provided one week prior to the Classroom segment of the course.

- The 3-day in-person portion of the course consists of dynamic and intensive sessions to present research, content, case studies, interactive exercises, and group projects to foster new insights and strategies, as well as the use of key industry professionals as guest speakers to share expertise and key insights. Course days and times are:
  - Thursday 9:00 A.M – 5:00 P.M.
  - Friday 9:00 A.M – 5:00 P.M.
  - Saturday 8:00 A.M – 1:00 P.M.

COST

$2,400
Ben Litalien, PhD, is one of a few global franchise experts with a unique combination of broad franchise experience and academic credentials. Ben has invested over 25 years in the franchise community, with a broad range of key management and franchise-building experience. He has developed and expanded four franchise concepts including two in food service, an automotive concept, and a web-based franchise.

Ben worked for Exxon Mobil as the U.S. Franchise Development Manager and oversaw the Company's On the Run convenience store franchise in the U.S., creating a unique Regional Franchise Developer program that was responsible for 1,000 franchise units in development.

In 2009, Ben formed a consulting practice, Franchise Well, where he advises select franchise companies on various matters including IKEA, RE/MAX, Zerorez, The UPS Store and Snap-on Tools.

Ben completed his doctoral program at University of Maryland in 2012, focused on the theory of Social Franchising. He was presented with the Karp Research Foundation Award in 2011 for the ‘best paper in franchising’.
ONLINE SESSION: INTRODUCTION TO FRANCHISING

Description: This 10-hour online course is Asynchronous and prepares each student with the language of franchising, the framework of the franchise model and an overview of franchising from various perspectives including the franchisee, the franchisor, supply partners and the customer. This course must be taken and completed prior to attending any other courses. The course will be taken online.

Learning Objectives:
- Learn the “language” of franchising and provide definitions and context for relevant terms
- Understand the franchise model framework including key pillars that underpin the model
- Create a foundation for more advanced learning in franchising

Agenda:

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<thead>
<tr>
<th>Time</th>
<th>Topic</th>
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<tbody>
<tr>
<td>30 Minutes</td>
<td>Welcome, Introductions &amp; Overview: Instructor welcome and overview of the course, objectives, and key learnings.</td>
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<tr>
<td>30 Minutes</td>
<td>History of Franchising: Franchising is a powerful and complex model that has its roots in the Middle Ages with Kings and how they managed their kingdoms. We’ll review where franchising started and how it evolved over time into the current economic powerhouse it is today.</td>
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<td>1 Hour</td>
<td>Franchising and the Alternatives: An overview of the alternative business models to franchising including dealerships and distributorships. We will look at current trends, challenges and opportunities using the franchise business model.</td>
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<td>1 Hour</td>
<td>Case Study: Why do companies choose to franchise vs. various alternatives?</td>
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<td>1 Hour</td>
<td>The Legal Framework of Franchising: The franchise model is regulated at the federal level in the U.S. under the auspice of the Federal Trade Commission, and several states have enacted laws regarding the offer and sale of franchises in their state. We’ll review the regulatory model and provide perspective on the legal aspects of franchising.</td>
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<td>Duration</td>
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<td>1 Hour</td>
<td><strong>Case Study:</strong> Students will evaluate several scenarios and apply the legal framework of franchising to address the situations.</td>
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<td>2 Hours</td>
<td><strong>A Global Perspective:</strong> We will look at franchising from a global perspective, featuring a review of the International Franchise Association and the International Trade Administration program from the U.S. Department of Commerce.</td>
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<td>45 Minutes</td>
<td><strong>Training in a Franchise Environment:</strong> Used as a growth strategy, making good decisions on locations is a critical component to development. We will review the parameters and issues.</td>
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<td>1 Hour</td>
<td><strong>Case Study:</strong> We will consider how training evolves within a franchise system.</td>
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<td>1 Hour</td>
<td><strong>Economic Impact of Franchising:</strong> The franchise model has a unique and compelling economic framework. We will lay the foundation for this framework including research on the franchise sector statistics, unique accounting considerations and implications.</td>
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<td>45 Minutes</td>
<td><strong>Technology in a Franchise Environment:</strong> Increasingly, franchise companies are highly evolved with technology platforms that support the underlying business imperatives and managing the franchise network. We will review the typical “tech stack” for a franchise company and review the trends in franchising.</td>
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<td>30 Minutes</td>
<td><strong>Course Wrap-up:</strong> Instructor will provide a summary of the program, review the learning objectives that should have been achieved and provide insights and next steps.</td>
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The Franchisor Journey

IN-PERSON CLASSROOM SESSION

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<tr>
<th>Time</th>
<th>Location</th>
<th>Instructor</th>
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| 9:00AM – 5:00PM MT | Daniels College of Business  
2101 S. University Blvd. Denver CO. 80208 
Room 680 Schneider Board Room | Dr. Ben Litalien |

DAY ONE – JULY 27, 2023

<table>
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<tr>
<th>Time</th>
<th>Event Description</th>
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| 9:00AM – 9:30AM | **Welcome, Introductions & Overview**  
Participant introductions & goals for the program | Review agenda | Update class roster |
| 9:30AM – 12:30AM | **Concept Development: Moving from Idea to a Business**  
A franchise is generally someone’s business idea they wish to expand. We’ll examine how to determine if an idea is “franchisable”. |
|               | **Case Study**  
Small groups will evaluate various concepts to see if they are a good fit for franchising |
|               | **Guest Speaker**  
Adam Contos, Partner Area15 Ventures (former CEO RE/MAX) will provide insights on how to move a business from concept to a franchised business |
| 12:30PM – 1:30PM | **Lunch:** Lunch will be provided |
| 1:30PM – 4:30PM | **The Start-Up Stage of a New Franchise Concept**  
This phase is critical to setting the proper foundation for rapid growth and profitable expansion. We’ll review key strategies and consider the challenges. |
|               | **Case Study**  
Small groups will consider differing concepts and the start-up challenges they faced |
|               | **Guest Speaker**  
Heidi Ganahl, Founder of Camp Bow Wow will share her insights on her start-up and growth into an amazing brand |
| 4:30PM – 5:00PM | **Review & Wrap-up** |
### IN-PERSON CLASSROOM SESSION

**Time:**
9:00AM – 5:00PM MT

**Location:**
Daniels College of Business
2101 S. University Blvd. Denver CO. 80208
Room 680 Schneider Board Room

**Instructor:**
Dr. Ben Litalien

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**DAY TWO – JULY 28, 2023**

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<th>Time</th>
<th>Activity</th>
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| 9:00AM – 9:30AM | **Review & Reflection**  
Discussion on Day One concepts | Resolve outstanding questions |
| 9:30AM – 12:30PM | **Extending The Franchise Growth Phase**  
Arguably the most important segment in the franchisor journey, once the concept is firmly established and growing rapidly, is to drive that growth for an extended period of time. We'll examine the key drivers to extending franchise system growth and consider why many are not able to do so. |
|                | **Case Study**  
Small groups will look at scenarios where growth was extended and some where it was not to determine cause and effect |
| 12:30PM – 1:30PM | **Lunch: Lunch will be provided** |
| 1:30PM – 4:30PM | **Handling Maturity of a Brand and Avoiding Decline**  
Over time, all franchise systems plateau. It is important to recognize when that occurs and how to manage accordingly. If unaware, or left unattended, brands fall into decline. We'll look at the research on how to restart the growth engine and avoid decline. |
|                | **Case Study**  
Small groups will examine innovation in franchising and how it drives renewed growth |
|                | **Guest Speaker**  
Susan Reed, expert in innovation and founder / CEO of Edge Dweller will share how to build an innovation strategy and plan for a company |
| 4:30PM – 5:00PM | **Review & Wrap-up** |
## IN-PERSON CLASSROOM SESSION

**Time:**
8:00AM – 1:00PM MT

**Location:**
Daniels College of Business
2101 S. University Blvd. Denver CO. 80208
Room 680 Schneider Board Room

**Instructor:**
Dr. Ben Litalien

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### DAY THREE – JULY 29, 2023

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<tr>
<th>Time</th>
<th>Session</th>
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<tr>
<td>8:00AM – 8:30AM</td>
<td>Review &amp; Reflection</td>
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<td>Discussion on Day Two concepts</td>
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<tr>
<td>8:30AM – 12:30PM</td>
<td>Dealing with Disputes in Franchising</td>
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<td>In the franchise journey, there will be disputes that arise along the way. It is important to understand how dealing with them may impact the brand, growth, and franchisor-franchisee relations.</td>
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<td><strong>Case Study</strong></td>
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<td>This exercise will allow students to enter “negotiations” playing different roles to see how it impacts the outcome</td>
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<td><strong>Guest Speaker</strong></td>
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<td>Len MacPhee, leading franchise attorney and litigator from Polsinelli, PC will share examples, stories, and insights from his extensive experience.</td>
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<tr>
<td>12:30PM – 1:00PM</td>
<td>Session Review &amp; Wrap-up</td>
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