

# Phases of Franchise Training

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The successful execution of the most brilliant franchise concept depends largely on one key initiative: training the daylight out of everyone in the system. Designing critical elements of training before you sell franchises is essential if your franchisees are to succeed. Not only will effective training contribute to your brand's quality and consistency, prospective franchisees are impressed when they see you've committed to robust training throughout the organization.

## Phase One

### *Manuals*

The obvious starting point is the Operations Manual. This is the company's repository of everything the franchisee needs to know in order to run the business. General topics include store operations (standards, policies, procedures staffing, etc.) financial management, marketing and advertising.

The Ops Manual must be complete before recruiting franchisees a) because it's a fantastic sales tool demonstrating your commitment to franchisee support and b) because every detail of running a business needs to have been thoughtfully documented in order to train the first franchisees.

Next on the list of manuals will be those needed for site selection and build out – again to set the stage for launching new franchisees.

### *Franchisee Training*

Your investment in these manuals will be leveraged even further when you use them as your reference materials for new franchisee training – clearly another essential to launching franchisees. Assigning sections of the manuals as pre-work or homework gets franchisees in the habit of using them and conveys the critical information they need to know.

The new franchisee training program should impart the vision of the franchisor as well as the nuts and bolts described in the manuals. Typically the program consists of classroom training including visits from key department heads to describe functions related to their area: local store marketing, operations, accounting, etc.

If the company is new to franchising, provide some hands on experience to the new franchisee in the company owned store(s) to augment the classroom training. In a mature franchise system, assign the neophyte to an experienced franchisee mentor to "shadow" for a period of time.

### *Unit Level Training*

Another essential piece of training is that aimed at unit employees. Whether there are technical procedures to delivering the service or product, or product knowledge to convey to customers, franchisees can't open their doors until their people have completed that training. Whether the offering to customers is packaging, sandwiches, haircuts or business services, frontline personnel need specific skills and knowledge to carry out the task. Often these are taught through videos or through other training aids supervised by the store manager.

### *Unit Manager Training*

Unit managers are pivotal to the success of any store operation and for the most part are promoted from the ranks with little or no experience in managing. Manager training as a priority should fall into phase one though some new franchise systems don't recognize this. If manager training is not built into your start up plan, the development of managers falls to franchisees that may or may not have the skill to do that training.

The good news is that there are many avenues for executing manager training. Classroom training is great for managers who benefit from coming together with others from the system and from getting practical employee management experience through role plays and demonstrations. I've had the pleasure of training countless Supercuts managers this way who have been launched into careers they thought were previously unattainable to them.

But alas, the cost of having managers out of their businesses and sometimes out of town for this type of training makes it prohibitive for some companies. Great alternatives do exist: blended learning combining teleclasses and web-based approaches can provide more flexible options that don't require the manager to be gone for long stretches from the store. There are some web-base training programs that allow managers to access information "just-in-time". For example, 20 minutes before conducting an interview, a manager can jump online to access customized interview questions and review "do's and don'ts" for the interview process.

### ***Phase Two***

Let's assume the franchise has grown to include multi-unit franchisees that often employ general managers or senior managers to oversee multiple units. For multi-unit franchisees, it's helpful to structure programs that are directed at their unique challenges and opportunities; negotiating larger scale purchases, rotating staff, developing their own trainers, building a pipeline of managers, etc.

General Managers are often overlooked when it comes to training. They are usually managers promoted to general manager positions and are in need of further development to be able to shed their old roles and assume higher levels of responsibility.

The notion of expensive classroom training can undermine initiatives to train GMs, but remember there are alternatives; teleclasses combined with web-based training provide a blended approach that can be easily shaped to the needs of GMs. Often what they most need is a network for problem solving and the facilitated tele-class provides a great cost effective method for accomplishing that.

### ***Phase Three***

Once the franchise system has reached a critical mass, franchisee and manager conventions become great venues for ongoing training and inspiration. Field consultants and general managers can fit into either or both of these audiences. These provide the franchisor a vehicle for communicating new programs and products, conducting advanced training, and injecting stimulating new approaches by bringing in outside speakers. Equally as important, these conventions renew franchisee and manager loyalty and pride as they're reminded that they're part of a now large, established, and successful company.

### ***Beware Stale Training***

As you refine your system, alter policies, add new products and services, and find more productive and profitable methods for unit operation, you'll need to revise manuals, franchisee, unit manager and employee training, and reshoot videos. Manuals should be revisited at a minimum of once a year. Thankfully, you'll have started with a model for manuals that is sectioned and numbered so that pages are easily replaced! Revisit videos every 2-3 years. The better you are at continuously improving your business, the more you'll need to update your manuals and training.

### **Corporate Training**

Everyone in your corporate office needs Franchising 101 to learn the differences between working with employees and working with franchisees unless they've worked for a franchisor before. And even then, a brush-up doesn't hurt since there are legal ramifications for the franchisor if someone who works for you takes the wrong tack with a franchisee.

Additionally, there are two key positions at the corporate level that need focused training to ensure the success of the franchise: the franchise development manager and the field consultant(s). The franchise development manager clearly needs training as part of phase one, in order to sell franchises.

The franchise development manager will be recruiting franchisees and representing the franchise opportunity to prospects. There is perhaps no position more vulnerable to legal retribution than the franchise development manager since they are representing the franchise offering and fielding questions about

potential sales and support. Any misrepresentations, intentional or otherwise lay a path for future lawsuits. Here, your franchise lawyer may participate in training to clarify what can and cannot be communicated to prospective franchisees.

Field consultants usually come from the ranks of seasoned operators within the system. This may be a corporate general manager or in the event the franchisor has only one corporate store, it may be the founder that functions as the field consultant for the first few franchisees! Field consultants generally already have operational expertise but may need development presentations skills to provide training, business analysis and consultation skills (e.g. establishing credibility, building trust and providing advice in a manner that is well received.).