



EMERGING FRANCHISOR CONFERENCE NOVEMBER 2-4

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Nashville, TN

EVENT PROGRAM

Power Your Franchise

Plug-and-play software simplifying your daily workflows with fewer clicks, seamless integration, and an intuitive interface

⚡ Work leads from multiple sources

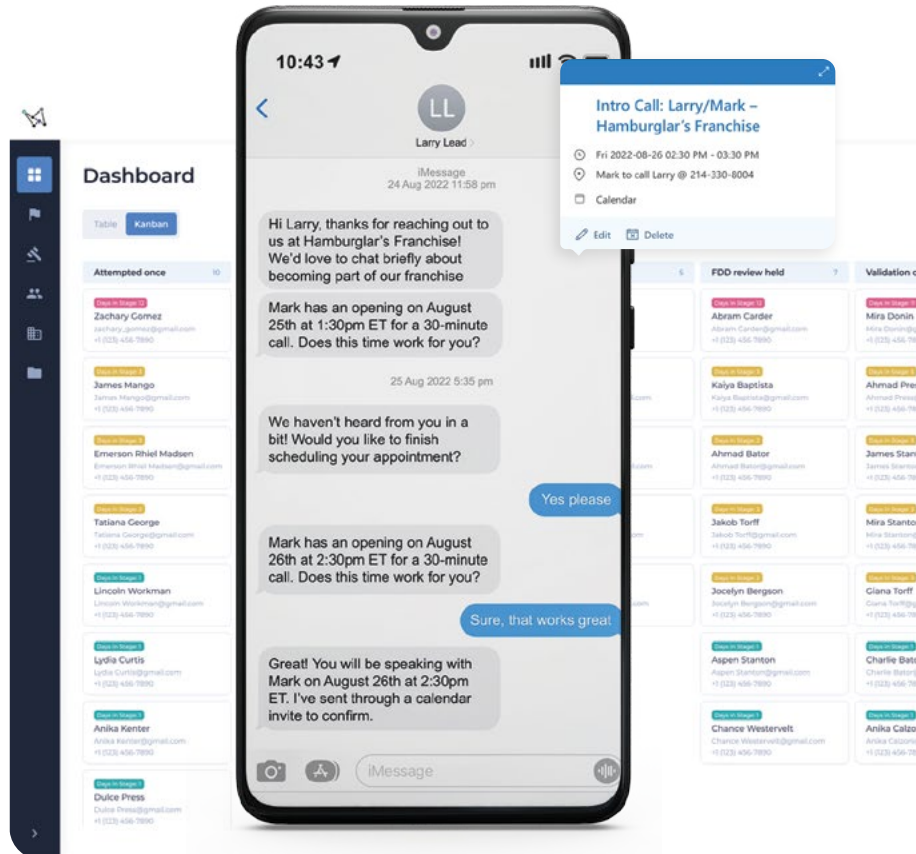
Franchisely automatically imports leads from your website and franchise lead portals alike

⚡ Speed to lead

Franchisely's powerful text automations contact franchise leads immediately and intelligently, based on their time of inquiry

⚡ Focus on the leads that matter

Don't waste another minute on unserious franchise leads - Franchisely's conversational A.I scheduler handles new leads, while you focus on closing sales



Schedule calls with texting A.I.

- ✓ Expect 98% of messages to be opened, vs. 20% of traditional drip campaign emails
- ✓ Persistent follow-up for 60 days in the background
- ✓ Direct integration with Microsoft Outlook and G Suite

Maintain your data from lead to multi-unit franchisee

- ✓ Refer to a single source of truth for all information and documents
- ✓ Manage prospects, franchisees, and locations all in one platform
- ✓ Easily handle multi-unit franchisee management

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A Franchise Growth and KPI Tracking Software

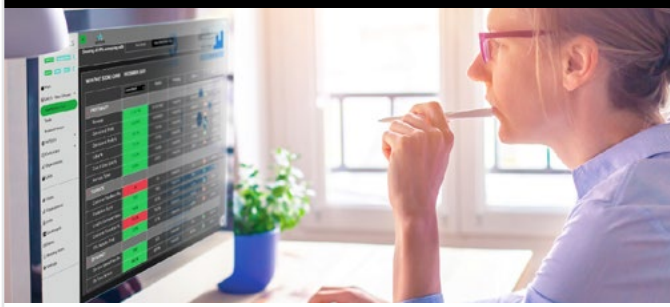
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CONVENTION**
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future of your franchise.

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www.franchise.org/convention

Thank You to Our Conference Planning Task Force Members

David Bloom, CFE, Chief Development Officer &
Operating Officer, Capriotti's and WingZone

Bill DiPaola, Chief Operating Officer, Ballard Brands

Talia McDougall, VP of Operations, Any Lab Test Now, Inc.

Meg Roberts, CFE, CEO & President, The Lash Lounge

Andrew Thengvall, Chief Development Officer & Chief
Legal Officer, Freddy's

Larisa Wagela, CFE, Vice President, Marketing, Ziebart
International Corporation

Josh Wall, Chief Growth Officer, Unleashed Brands

Shannon Wilburn, CFE, Co-Founder, Advisory &
Mentoring, Just Between Friends

GETTING STARTED

WIFI



Network Name: **EFC2022**

Password: **franmetrics**

Sponsored by:  **FRANMETRICS**



SOCIAL MEDIA

Be sure to share your experience on social
media by posting with the hashtag
#IFA_EFC2022.



CFE CREDITS

You will earn **300** CFE Education Credits
towards the completion of the Certified
Franchise Executive (CFE) accreditation by
attending this program.



NEED A NEW PROFESSIONAL HEADSHOT?

Near the table-top exhibitors on Thursday
and Friday, there will be a free headshot
station setup for you to get glammed up and
take a new photo! Each attendee will receive
their headshot delivered through email on
site. The Headshot Station will be open during
the tabletop exhibitor hours.

Sponsored by:



EVENT SCHEDULE

**All noted times are CST.*

Wednesday, November 2

7:00 am – 5:30 pm

Registration Desk Open

Ballroom Foyer

8:00 am – 10:15 am

CFE Session: Systems to Protect & Grow Your Brand*

Armstrong 1

**Additional Registration Fee*

10:30 am – 12:30 pm

CFE Session: Impact of Inflation on Franchisee Financials*

Armstrong 1

**Additional Registration Fee*

12:30 pm – 4:00 pm

Franchisor Field Trip: CKE Restaurant Holdings, Inc Headquarters*

Franchisor attendees will tour CKE Restaurant Holdings, Inc. headquarters and hear from leadership of various divisions as well as get a quick bite to eat from one of their brands. Buses will pick up outside of the Hilton Nashville lobby at 12:30 PM to take attendees to CKE Headquarters. Then at 3:30 PM, buses will pick everyone back up at CKE Headquarters' front lobby to drop off at Hilton Nashville. Please be prompt to each pick-up time so no one gets left behind!

**Additional Registration Fee*

3:30 pm – 4:00 pm

Pre-Event Networking Break Kickoff

Ballroom Foyer

4:00 pm – 4:50 pm

Welcome and Opening General Session

Boone/Crockett

Sponsored by



5 Milestones of a Successful Franchising Journey

A decade from emerging brand start-up to franchising category leader

- Hear some of the lessons learned from the founder and CEO of the world's first youth enrichment franchise platform.

- When to press the accelerator and when to tap the brakes.
- How to build the right team to serve your franchisees well.
- Wisdom built while leading through a crisis.



Michael Browning

Speaker: Michael Browning, Founder & CEO, Unleashed Brands

4:50 pm – 5:30 pm

Business Headwinds and Tailwinds: Turning Opportunities into your Brand Success Story

Boone/Crockett

Hear how the current economic conditions including inflation, minimum wage and unemployment are impacting businesses today. Learn how successful CEOs are utilizing this data to communicate with their system, maintain momentum and positivity while preparing their franchise brands for tomorrow.

Moderator: Meg Roberts, CFE, CEO & President, The Lash Lounge

Speakers: Rob Price, CEO School of Rock; **Steve White**, CEO, PuroClean; **Christina Russell, CFE**, CEO, Radiance Holdings



Meg Roberts



Rob Price



Steve White



Christina Russell

6:00 pm – 7:00 pm

Happy Hour

HQ Beercade Nashville (114 2nd Ave S)

Step back into the 80's and join fellow conference attendees for drinks, networking, and the best classic arcade games! It is a 6-minute walk from the hotel. Feel to walk over on your own or meet an IFA staff member in the lobby by 5:45pm who will lead attendees over.

7:30 pm – 9:00 pm

FranPAC Donor Dinner*



For more information, please contact Anna Russell at arussell@franchise.org. **Separate registration required.*

Thursday, November 3

7:15 am – 5:00 pm

Registration Desk Open

Ballroom Foyer

7:45 am – 8:15 am

Continental Breakfast with Table-Top Exhibitors

Ballroom Foyer

8:15 am – 8:45 am

General Session

Boone/Crockett

FAST Act and the Importance of Advocacy

It may only impact QSR in California today, but policymakers are advancing legislation to sabotage franchising around the country. Learn what you need to know from the President & CEO of IFA to navigate the political landscape so you can continue to grow your emerging brand.

Speakers: **Matt Haller**, President & CEO, International Franchise Association; **Michael Layman**, Senior Vice President, Government Relations & Public Affairs, International Franchise Association; **Emma Dickison, CFE**, CEO & President, Home Helpers; **Steve White**, CEO, PuroClean



Matt Haller

Michael Layman

Emma Dickison

Steve White

8:45 am – 9:45 am

General Session

Boone/Crockett

Where do I Start? Design Your Playbook for Success

Break down the nutritional facts to become a healthy, operationally sound, franchisor. Explore the cornerstone elements of the franchise food groups from Franchise Development, On-boarding, Training, Operations, Marketing and Finance. Too many emerging franchisors are seeking “get there fast” diets too quickly to achieve their own success stories. The real success in franchising is a responsible diet.

Moderator: **Talia McDougal**, VP of Operations, Any Lab Test Now, Inc.

Speakers: **Matt Friedman**, Founder, Wing Zone & CEO, Franchise Founders; **Dave Keil**, President, Franworth



Talia McDougal

Matt Friedman

Dave Keil

9:45 am – 10:45 am

C-Suite Think Tank & Forum Exchange Roundtables

Boone/Crockett

During this session attendees will deep dive into discussion (s) around how emerging brands can manage the environment and be prepared for what's to come. Key issues around FranDev in the upcoming recession, inflation, supply chain and labor are top of mind for the 'C' Suite facilitators. Get ready to engage with leadership of other franchise systems! After table deliberation, the sessions Moderator will facilitate each table assigned spokes-

person to share the issue (s) discussion and more importantly strategies in solving or elevating their system.

Moderator: **Ned Lyerly**, CEO, CKE Restaurants Holdings, Inc.

Mentors: **David Blue**, Brand President, The Dudan Group; **Emma Dickison, CFE**, CEO & President, Home Helpers; **Bill DiPaola, CFE**, COO, Ballard Brands; **John Francis**, Board Member, Sport Clips, Inc.; **Matt Friedman**, Founder, Wing Zone & CEO, Franchise Founders; **Dave Keil**, President, Franworth; **Nick Lopez**, Founder & Steward, LIME; **Jason Losco**, Chief Development Officer, WellBiz Brands, Inc.; **Larry Oberly, CFE**, President & CEO, SpeedPro; **Kim Robinson**, VP of Franchise Development, Massage Heights; **Nicole Salla, CFE**, Chief Marketing Officer, Kiddie Academy; **Josh Skolnick**, Chairman, Horsepower Brands; **Cathy Skula, CFE**, Board Meeting, Best Life Brands; **Andrew Thengvall**, Chief Development Officer & Chief Legal Officer, Freddy's; **Josh Wall**, Chief Growth Officer, Unleashed Brands; **Larisa Wagela, CFE**, Vice President, Marketing, Ziebart International Corporation; **Steve White**, CEO, PuroClean; **Shannon Wilburn, CFE**, CEO & Co-Founder, Just Between Friends

10:45 am – 11:15 am

Refreshment Break with Table-Top Exhibitors

Ballroom Foyer

11:15 am – 12:15 pm

Two Concurrent Sessions

1. How to Build a Team Now that Will Complement Your Team of the Future

Armstrong 1

Franchising is the dream-maker industry. Franchise owners come into the business to be supported and guided to ensure optimal results. With turnover and challenges with hiring, going back to the basics is crucial. What are your core values? Do you have a mission statement? What sets you apart from other brands? How do you take care of customer from start to finish? Hear from legacy franchise brands and industry leaders on how to build a team now, that will complement an expanded team in the future.

Speakers: **Cathy Skula, CFE**, Board Meeting, Best Life Brands; **Josh Wall**, Chief Growth Officer, Unleashed Brands

2. Franchise Relations: Firm, Fair, Friendly

Armstrong 2

Essential communication and relationship tools for long-term franchise success. Learn the ins and outs of Advisory Boards vs Fiduciary Boards and the strength they provide your brand. Compete at a higher level and add legitimacy and credibility - giving your franchisees peace of mind. Establish your voice from Day 1 and stick to it.

Speakers: **John Francis**, Board Member, Sport Clips, Inc.; **Meg Roberts, CFE**, CEO & President, The Lash Lounge; **Shannon Wilburn, CFE**, CEO & Co-Founder, Just Between Friends

12:15 pm – 2:05 pm

Boxed Lunches with Roundtable Discussions

Boone/Crockett

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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 your peers and discuss mistakes, lessons learned and success stories. Everyone participates at the table to get the most out of the discussions, which are led by franchise experts. You will get the opportunity to participate in two roundtables during this session.

ROUND ONE (Approx. 12:35 pm – 1:15 pm)

- Balancing Marketing Automation with Human Connection in Customer Service**
Facilitator: Karen Booze, CFE, Franchise Director of Strategic Partnerships, AnswerConnect
- Nationwide Implications of California's New FAST (AB257) Law on Franchising**
Facilitator: John Brice, U.S. Franchise Development Manager, BBSI
- The GREAT White North: Top Things to Know Before You Go to Canada**
Facilitator: Liisa Kaarid, Partner, Sotos LLP
- Marketing as a Team: How to Get The Most Out of Your Vendor Relationships**
Facilitator: Ali Kraus, CFE, VP of Marketing, Benetrends Financial
- Effective Franchisee Support While Minimizing Joint Employer Liability**
Facilitator: Amy Cheng, CFE, Partner, Cheng Cohen LLC
- Liquidity Options for Franchisors Other than Selling Equity**
Facilitator: Sean Morrison, President & CEO, Diversified Royalty Corp.
- What Does a Successful Support Model Look Like for Franchise Locations?**
Facilitator: Michele Brevig, Vice President of Sales & Service, Enspire for Enterprise
- Get Focused: How Emerging Brands Can Leverage Field Operations**
Facilitator: Kim Steenblock, Solutions Engineer, FranConnect
- Importance of a Resale Program**
Facilitator: Jessica Durbin, CFE, Franchise Relationship Manager, FranNet
- What Your Future Franchise Lawyer Wishes You Knew Now**
Facilitator: Dawn Johnson, CFE, Partner, Greensfelder, Hemker & Gale, P.C.
- Operation Manual: The Overlooked "Contract"**
Facilitator: Carlos White, Partner, Lathrop GPM LLP

- Balancing Brand & Local Marketing**
Facilitator: Crystal Ware, Managing Director, Location3
- Employee Comradery Impacts Retention & Attracts New Talent**
Facilitator: Abby Schmidt, Franchise Partnership Development Manager, Paychex, Inc.
- Digital Marketing: Where to Start**
Facilitator: AJ Shull, Brand Sales Manager, RevLocal
- Quality vs Quantity When Finding Your Next Franchisees**
Facilitator: Melissa Pang, Member Relationship Strategist, The Entrepreneur's Source
- When to Grow: Sharing Lessons Learned on Expanding Your Franchise Business**
Facilitator: Paul Lewis, Director of Franchise & Verticals, Xero
- Growing Your Brand Through Loyalty Programs**
Facilitator: Tom Epstein, CFE, Franchise Payments Network
- What Creative Things Are You Doing to Retain Talent?**
Facilitator: Shauna Scott, Senior Vice President of Sales, Paycor

ROUND TWO (Approx. 1:25 pm – 2:05 pm)

- Standardizing Suppliers for Franchisees**
Facilitator: Kelly Harrison, Director of Franchise Relationships, ADP
- How to Help Franchisees Overcome Inflation**
Facilitator: Aicha Bascaro, American Franchise Academy
- How to Hire Your First Franchise Business Coach to Support Franchisees**
Facilitator: Angels Cote, Franchise Growth Strategist, Angela Cote Inc.
- Tough as Nails or User Friendly: Balancing Franchise Agreements**
Facilitator: Joel Buckberg, Shareholder, Baker, Donelson, Bearman, Caldwell & Berkowitz
- WWW: Website Woes and Wins**
Facilitator: Madalina Iordache, CEO, Bright Pink Agency
- Hiring Difficulties: Have You Had Success Supporting Your Franchisees?**
Facilitator: Wayne Engeron, Franchise Account Executive, Career Plug
- The Halo Effect**
Facilitator: Kenny Markanich, President, Corporate Clothier
- Creating Your Optimal Franchise Tech Stack**
Facilitator: David Joseph, Chairman, DAVO by Avalara
- Key Milestones for Successful Franchise Development**
Facilitator: Charles Piazza, Foxfield Construction Ltd
- Best Practices for ITEM 19 Financial Performance Representations**
Facilitator: Evan Jason West, CFE, President/Founder, Fran Metrics
- Funding for Your First 10 Franchisees**
Facilitator: Tim Seiber, CFE, Director Franchisor Relations, FranFund, Inc.

12. **Implementing Safety and Loss Control with Franchise Owners to Reduce Claims**
Facilitator: **Chris Mangum, CFE**, President, Gallagher Franchise Solutions
13. **Don't Let an Uncertain Hiring Environment Let You Get Messy**
Facilitator: **Olivia Miller**, Business Development Manager, HiringThing, Inc.
14. **Grassroots Lead Generation Tactics for Solid Growth**
Facilitator: **Dawn Abbamondi**, VP Marketing & Brand Development, SMB Franchise Advisors
15. **Discovery Day – What Is It and What Should I Do?**
Facilitator: **Josh Wall CFE**, Chief Growth Officer, Unleashed Brands
16. **How Do You Differentiate Your Brand in a Crowded Industry**
Facilitator: **Kenny Stocker**, VP of Sales & Partnerships, V Digital Services
17. **Drive Efficiency Using Tools to Automate Processes and Workflows**
Facilitator: **Yoni Balan**, VP of Business Development and Partnerships, Workiz

2:15 pm – 3:15 pm Two Concurrent Sessions

1. I Have an FDD, Now What?

Armstrong 1

Sponsored by



Learn how to use FDD as a sales tool. Make your FDD relevant and put everything in the Item 19. This session will explore ways to leverage your otherwise “dry” legal documents to drive franchise sales by alleviating a prospect’s fears and describing a compelling business opportunity within the law.

Moderator: **Amy Cheng, CFE**, Partner, Cheng Cohen LLC

Speakers: **Jeff Baldwin**, Vice President, Franchise Development, Donatos Pizzeria, LLC; **Kim Robinson**, VP of Franchise Development, Massage Heights

2. Franchise Rapid Development: Utilizing Franchisor Economics to Plan for Growth

Armstrong 2

Sponsored by



Moderator: **Eric Schechterman**, Business Development Advisor, Benetrends

Speakers: **Theresa Huska, CFE**, Business Development Advisor, ManageMowed; **Jason Losco**, Chief Development Officer, WellBiz Brands, Inc. after Theresa; **Josh Skolnick**, Chairman, Horsepower Brands

3:15 pm – 3:45 pm Refreshment Break with Table-Top Exhibitors Ballroom Foyer

3:45 pm – 4:45 pm

General Session

Boone/Crockett

Sponsored by: **thryv**

Balancing Technology to Catapult Growth in Operations, Development, and Finance

Too many franchisors are looking at technology as solution to all issues. This session will share how to utilize technology platforms and communication tools that result in efficiency, compliance, and create “space” to deliver more. This will include:

Development:

Discussion of data and timeline visibility enterprise-wide resulting in long term and near-term flexibility.

Operations:

How technological tools can harness growth and capture operational indicators for transparency.

Finance:

Understanding and using technology and data to guide growth including reporting for budget, forecast and long-term impacts.

Moderator: **Matthew Gourgout**, Head of Corporate and Business Development, Thryv

Speakers: **Bill DiPaola, CFE**, COO, Ballard Brands; **Emma Dickison, CFE**, CEO & President, Home Helpers; **Andrew Thengvall**, Chief Development Officer & Chief Legal Officer, Freddy's



Matthew Gourgout



Bill DiPaola



Emma Dickison



Andrew Thengvall

4:45 pm - 5:45 pm

Reception with Table-Top Exhibitors

Ballroom Foyer

Take advantage of another opportunity to form business connections and share learnings from the day’s events in a casual setting with good food and a cocktail. During this Reception, you will also have the opportunity to take a free, professional headshot if you need one! The ‘headshot station’ will be setup in the Ballroom Foyer and available for attendees to stop by anytime between 5:30 – 6:30pm.

6:30 pm – 8:15 pm

Sponsored Dine Arouds

Stress free networking – Need help taking the first step in forging new business relationships? IFA will be creating small groups of 10 to dine at a nearby restaurant for franchisor attendees. Get a taste of Nashville while creating bonds with your fellow attendees. (Pre-registration required.)

Those attending a dine-around should have a label on the back of their badge with the name of the restaurant you will be dining at— Merchants or The Southern Steak & Oyster. If you have been assigned a restaurant, please meet in the lobby of the Hilton no later than 6:20pm. IFA staff members will greet everyone in the lobby, gather based on restaurant, and then walk each group to the assigned restaurants.

This event is only open to Franchisor and Franchisee attendees – if this is you and you don't have a restaurant assignment, but would like to attend, please see the Registration Desk by Thursday, November 3rd at NOON.

Friday, November 4

7:30 am – 12:15 pm

Registration Desk Open

Ballroom Foyer

7:45 am – 8:15 am

Continental Breakfast with Table-Top Exhibitors

Ballroom Foyer

8:15 am – 9:15 am

General Session

Boone/Crockett

How to Develop a FranDev Marketing Strategy

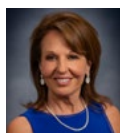
Every piece of your business, including franchise development, needs the bones of a solid marketing plan build to ensure lifelong relationships are built. Hear from a panel of franchise experts who will walk you through how to build a marketing strategy, to ensure you are attracting a franchise owner who will have a meaningful connection with your brand.

Moderator: Shana Krisan, Chief Marketing Officer, Goldfish Swim School Franchising, LLC

Speakers: Susan Boresow, President & CEO, Massage Heights; Dick Sveum, Director of Franchise Development, Edley's Restaurant Group, LLC; Nicole Salla, CFE, Chief Marketing Officer, Kiddie Academy



Shana Krisan



Susan Boresow



Dick Sveum



Nicole Salla

9:15 am – 9:45 am

Refreshment Break with Table-Top Exhibitors

Ballroom Foyer

9:45 am – 10:45 am

Two Concurrent Sessions

1. Oh, S#it! I Screwed Up...Can I Fix It?

Armstrong 1

When you've made a mistake (or, mistakes... many mistakes), there is definitely a way to recover. Your mistakes can define you and defeat you, if you let them. They can also be your greatest catalyst for exponential success. Hear from these industry pros that have seen the edge of disaster, came back from it, experience in hand, and lead their systems to success.

Moderator: Larry Oberly, CFE, President & CEO, SpeedPro

Speakers: David Blue, Brand President, The Dudan Group; Heidi Morrissey, Brand President, Kitchen Tune-Up & Bath Tune-Up

2. Balance the Needs of Your Brands Three Core Customer Groups (Consumer, Zee & HQ Staff)

Armstrong 2

As the lead marketing person or owner, how do you bring all these together with your brand promise at the center? Your brand positioning differentiates you in the marketplace, but the goals of your three customer groups are very different when delivering against your brand's vision statement. Hear how top franchise leaders plan, manage, and measure the needs of their employees, franchise owners and customers via an evolving culture and integrated marketing plan.

Speakers: Cathy Chavenet, VP of Marketing, Duck Donuts; Nick Lopez, Founder & Steward, LIME Painting; Larisa Wagela, CFE, VP, Marketing, Ziebart International Corporation

11:00 am – 12:00 pm

Closing General Session

Boone/Crockett

What Could Go Wrong?

Most reputational crises for brands have one thing in common: they're often self-inflicted. Drawing on more than 35 years' experience, speaker Tim McIntyre helps companies identify and prevent problems before they start, and how to respond should a crisis hit.

Speaker: Tim McIntyre, Principal, T/M Communications, LLC



Tim McIntyre

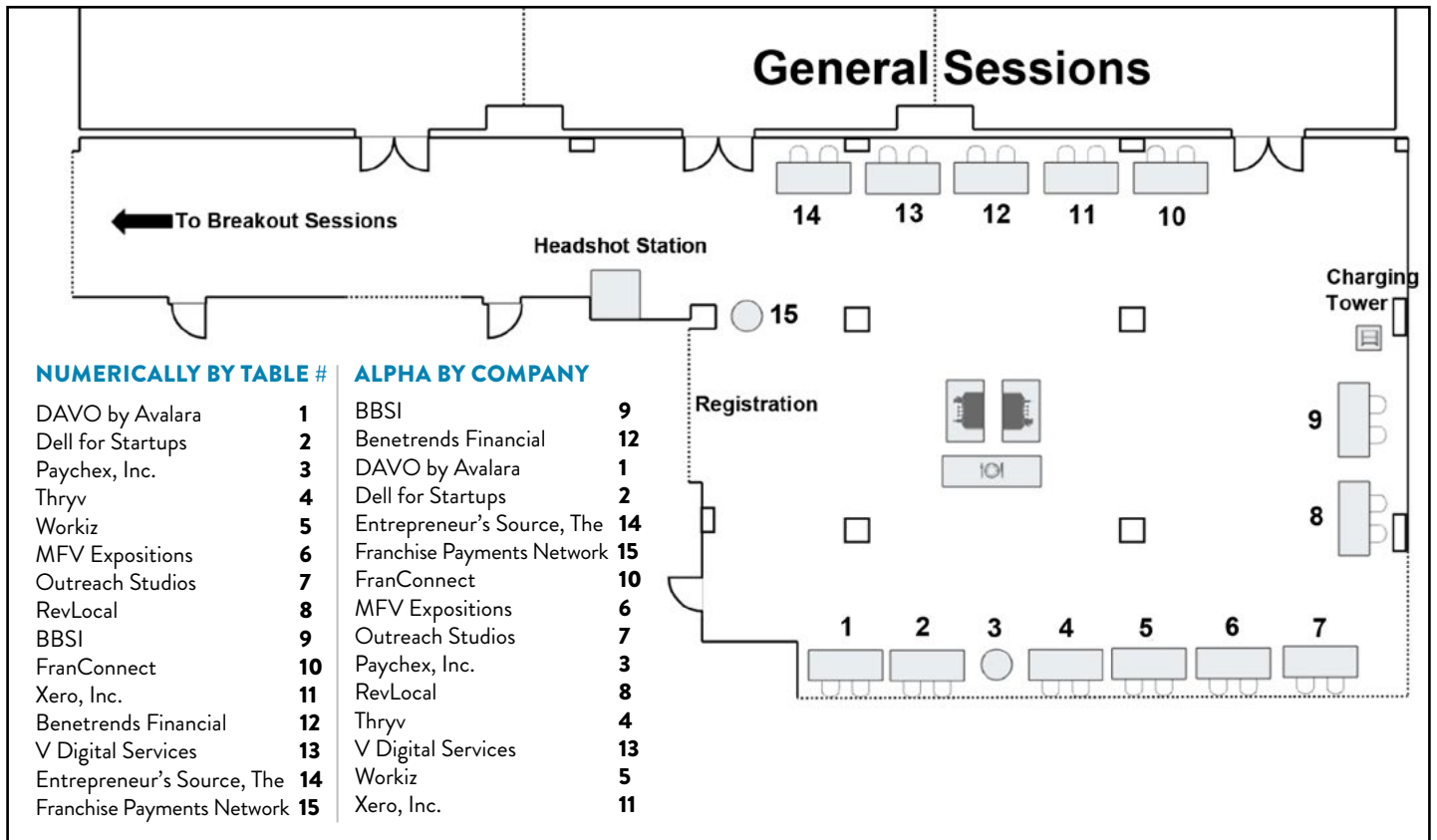
12:00 pm

Conference Adjourns

Save the Date!

EFC 2023
NOVEMBER 1-3
HILTON NEW ORLEANS
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Table-Top Display Map



Monday, February 27 | 7:45 am – 10:15 am
Mandalay Bay Resort & Casino | Las Vegas, NV

The 2023 Emerging Franchisor Bootcamp is designed to provide practical value and networking that kick starts your learning. Participants once again will learn from the best in franchising through an opening presentation featuring David Barr, Chairman, PMTD Restaurants LLC; Managing Director & Partner, Franworth, followed by the centerpiece of the Bootcamp - peer and mentor input to solve business issues emerging franchisor attendees bring to the table.

The 2023 Emerging Franchisor Bootcamp is \$149 per person and is open to the first 250 fully registered franchisors with 100 units or less to sign up.

Go to www.franchise.org/convention to register today!



2023 IFA ANNUAL CONVENTION

REGISTRATION NOW OPEN!

February 26-March 1, 2023 | Las Vegas, NV

CFE Special Sessions: February 25- 26

MFV FRANCHISE EXPO WEST

March 31-April 1, 2023 | Phoenix, AZ

CFE Special Sessions: March 30

Partnership event with MFV Expositions/Comexposium

LEGAL SYMPOSIUM

May 7-9, 2023 | Washington, DC

IBA/IFA JOINT CONFERENCE

May 9-10, 2023 | Washington, DC

MFV INTERNATIONAL FRANCHISE EXPO

June 1-3, 2023 | New York, NY

CFE Special Sessions: May 31

Partnership event with MFV Expositions/Comexposium

FRANCHISE CUSTOMER EXPERIENCE CONFERENCE

June 20-22, 2023 | Atlanta, GA

CFE Special Sessions: June 20

Partnership event with Franchise Update Media

MFV FRANCHISE EXPO SOUTH

September 8-9, 2023 | Ft. Lauderdale, FL

Partnership event with MFV Expositions/Comexposium

IFA LEADERSHIP SUMMIT & FRANCHISE ACTION NETWORK ANNUAL MEETING

September 11-13, 2023 | Washington, DC

FRANCHISE LEADERSHIP & DEVELOPMENT CONFERENCE

October 17-20, 2023 | Atlanta, GA

Partnership event with Franchise Update Media

EMERGING FRANCHISOR CONFERENCE

November 1-3, 2023 | New Orleans, LA

CFE Special Sessions: November 1



MARK YOUR CALENDAR

Scan here or visit franchise.org/events
for more information and registration



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Develop Your Brand

Research your target audience and apply your branding across your business.



Market Your Success

Create captive and engaging content to catch the attention of your future clients.



Create Your Growth

Chart your path to expansion in your industry and help grow you and your business.