

The Ideal Franchise Candidate **Worksheet**

Define exactly who you are selling to before you spend a dollar on lead generation.

SiteHub

Smart B2B teams define their ideal account before they buy a single ad. Franchisors should do the same with candidates. Skip this step and you pay for discovery calls with people who cannot fund the deal or will never follow the system. Work through the seven steps. **Be specific.** A vague profile produces vague, expensive lead gen.

1 Reverse-engineer your best franchisees

Your best future owners usually look a lot like your best current ones. List your top three to five performers, then hunt for the pattern.

FRANCHISEE	BACKGROUND BEFORE FRANCHISING	LIQUID CAPITAL AT SIGNING	WHY THEY BOUGHT IN	HOW THEY RUN IT (HOURS, OWNER-OP VS ABSENTEE)

What patterns repeat across your best owners?

2 Set the financial gate

This is your hard line. Below it, a person is not a lead no matter how excited they are. Write the floor, not the wish.

Minimum liquid capital

Minimum net worth

Minimum credit score

Total investment they must absorb (range)

Funding source that must be ready (cash, SBA, 401k rollover, partner, HELOC...)

3 Define the operator your model needs

A model that needs an owner behind the counter and one built for hands-off investors attract very different people. Pick the one that fits.

Owner-operator (in it daily)

Semi-absentee (manager-run, owner oversees)

Multi-unit investor (portfolio, hands-off)

Relevant background or skills

Hours per week the model demands

Non-negotiable trait (follows the system, coachable, sales-driven...)

4 Name the motivation (the "why")

People buy franchises for different reasons, and the reason drives your messaging. Mark the one or two that match your best owners.

Leaving corporate, wants to own something

Second career or a softer path toward retirement

Building a business to hand to family

Investor diversifying into an operating asset

First-time owner who wants a proven system, not a startup

In one sentence, why does your ideal candidate buy in?

5 Map your open territory

Do not pay for leads where you have nothing to sell. Geography is part of the profile.

Open or priority markets

Markets to exclude (sold out or protected)

What location or demographic traits signal a strong territory?

6 Write the disqualifiers

The fastest way to protect your budget is to name who you do not want. Check the ones that apply and add your own.

- Underfunded, hoping to "figure out financing later"
- Wants fully absentee when the model needs an operator
- Get-rich-quick expectations or an unrealistic timeline
- Will not follow the system, wants to "do their own thing"
- No relevant work ethic or background for the role
- Buying on emotion with no partner or spouse alignment
- _____

7 Synthesize the profile

Pull steps one through six into a single profile, then sort candidates into tiers so your team knows where to spend energy.

Our ideal franchise candidate is...

A · Pursue

Hits the financial gate and the operator and motivation fit.

B · Nurture

Close on fit, one gap to solve (funding, timing, territory).

C · Decline

Misses the gate or trips a disqualifier. Be polite, move on.

NOW TURN IT INTO A LEAD GEN FILTER

From profile to spend

A profile only saves money if it controls the budget. Translate your answers into the three controls below, and your lead gen targets the right people while your intake form screens out the rest.

1. Targeting – who you reach and where (pull from steps 2 through 5)

2. Three qualification questions for your intake form

3. Your disqualify-fast rule – the one answer that ends the conversation

How to use this on every campaign: Before you brief an ad set or build a landing page, check it against the profile. If the targeting, the offer, or the form is not screening for an A or B candidate, it is spending your money on C candidates.

Notes
