

Introducing FPS-Ultimate CRM

A powerful, easy-to-use pipeline management app for franchisee recruiters

Franchisee Recruitment Challenges

Why is It So Difficult to Get a Great CRM for Franchisee Recruiting?

1. Software designers don't understand franchisee recruiting
 - ✓ They often copy what everyone else is doing
 - ✓ Franchisee software suites specialize in finance and operations; not the CRM you rely on to manage your lead and candidate pipeline
2. Software integrators don't understand franchisee recruiting
 - ✓ You have to tell them "exactly" what you want and they'll build it for you. It may or may not be what you need

In response...we built FPS-Ultimate CRM to improve the satisfaction and productivity of franchisee recruiters

That's all we do

Franchise Pipeline Solutions

“What Makes FPS-Ultimate CRM Better”

**The only lead management application
created by franchisee recruiters for
franchisee recruiters**

- ✓ Utilizes our 3-click design rule
 - 85% of actions
3 clicks or less away
- ✓ Powerful features,
yet easy to learn



Franchise Pipeline Solutions

“What Makes FPS-Ultimate CRM Better”

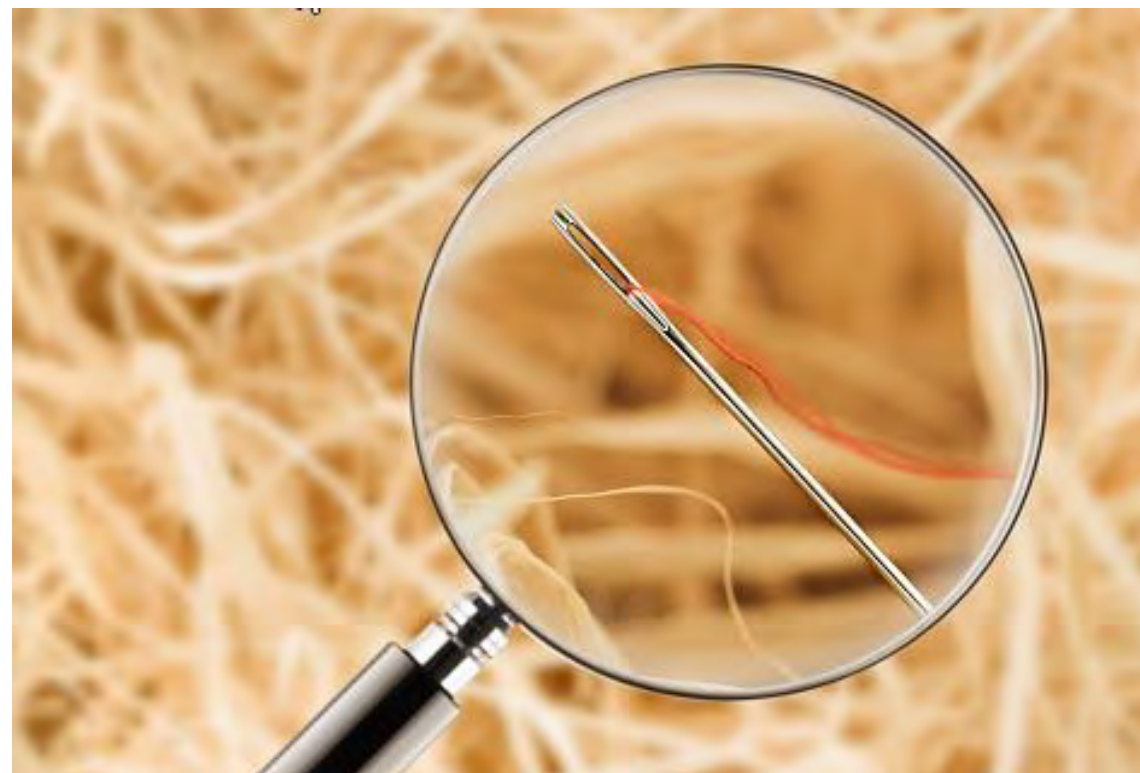
Top Functionality (nothing skimped) including...

1. Powerful features of Salesforce Enterprise CRM without the confusion, clutter and complexity
2. Auto-appointment scheduler links built into your texts, emails, social media and website
3. Integrated 1:1 and bulk text messaging from the CRM and your linked mobile device
4. Unlimited email and text messaging
5. Complete contact, candidate and milestone tracking within the pipeline
6. CRM Mobile App
7. Variety of lead views and report templates
8. Email and text templates
9. Auto drip email series
10. Full operational support



FPS-Ultimate CRM Snapshots

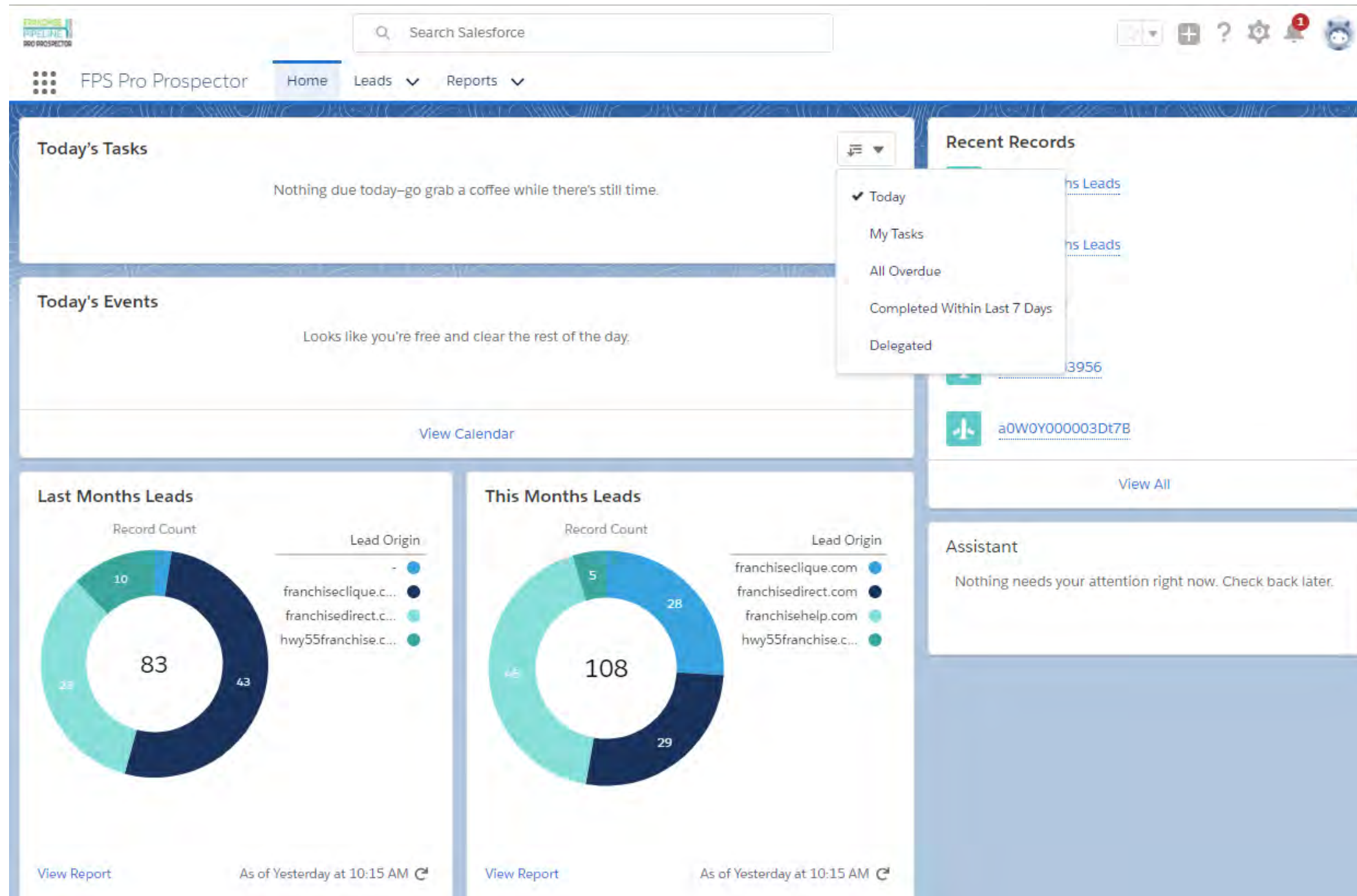
The only franchisee recruitment solution
built by recruiters for recruiters



FPS-Ultimate CRM in Action

Easy
Navigation
from Home
Screen

From the Home
Screen view Today's
Tasks and Events,
Dashboards, Recent
& New Lead Records



FPS-Ultimate CRM in Action

Details Lead View

1. Lead Submits Form
2. Info Entered Automatically
3. Quick lead contact info available on top
4. Notes and Attachments in Right Column

Lead Details View for Steve Ford

Details | Activity | SMS Conversations

Lead Owner: Guy Guthrie

Title:

Name: Steve Ford

Company:

Email Opt Out: ☐

Lead Source: Hwy 55

Lead Origin: TEST

2nd Lead Origin: PIP Form

Description: Recently inherited assets and would like to redeploy into restaurant industry

Pardot Score: 310

SMS Opt Out: ☐

International: ☐

Created By: Guy Guthrie, 11/13/2017 10:21 AM

Current Pipeline Stage: 24 Agreement - Signed

Lead Status: Contacted

Status Type: Interested

Current Status: Qualified

Rating: Hot

Why Disqualified:

Notes on Disqualification:

Email: steford1976@gmail.com

2nd Email Address:

Phone: (630) 697-4952

Mobile: (630) 697-4952

Do Not Call: ☐

Last Modified By: Pro Prospector, 11/16/2018 12:08 PM

Notes (3)

- FDD Review**
11/18/2017 3:45 PM by Pro Prospector
The review went smoothly with a few questions that he needs to run past his franchise attorney. I said an invitation to a Discovery Day would be...
- Investment Recap**
11/17/2017 11:45 AM by Guy Guthrie
Steven shared his financial situation showing me documents online to support his viability for a franchise. Invited him for a Discovery Day.
- Intro Call**
11/14/2017 12:13 PM by Pro Prospector
Pleasant fellow. Has new assets and wants to be in restaurant business. At a Hwy 55 four months ago and still remembered it. He can act in next six...

Notes & Attachments (3)

- Steven_Ford_LinkedIn_Profile
Dec 3, 2017 · 11KB · pdf
- Steve_Ford_CV
Dec 3, 2017 · 63KB · doc
- Steven_Ford_Bank_Accounts_Mortgage_Statement
Dec 3, 2017 · 311KB · pdf

Lead Summary Bar for Steve Ford

Lead: Steve Ford

Pardot Score: 143

Phone(2): (630) 697-4952

Lead Origin: TEST

Pardot Last Activity: 12/3/2017 11:28 AM

Email: steford1976@gmail.com

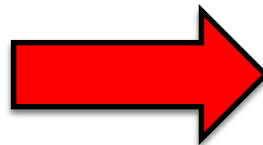
Actions: + Follow, New Note, Change Owner, Convert

FPS-Ultimate CRM in Action

1. Every step to manage a lead is on the Lead Details screen and easily accessible through a group of drop down menus (left) to capture pipeline stages, timeframe and other reportable metrics

- > Address Information
- > Additional Information
- > 1st Direct Contact
- > 1st Arranged Meeting
- > 2nd Arranged Meeting
- > 3rd Arranged Meeting
- > 4th Arranged Meeting
- > 5th Arranged Meeting
- > 6th Arranged Meeting
- > 7th Arranged Meeting
- > 8th Arranged Meeting
- > Agreements
- > Post Meeting Questionnaire
- > Milestone Checklist

1



5th Arranged Meeting

5th Meeting Date and Time
12/1/2017 8:00 AM

Day of 5th meeting
Friday

5th Type of Meeting
group

5th Meeting Purpose

5th Meeting Status
Attended

5th Meeting Host
Guy

5th Meeting Location
Head Office

5th Pipeline Stage
Validation Calls

FPS-Ultimate CRM in Action

Activity Tracking

All lead activities are found under the activity tab

Activities include composing emails, task management, new events and logging calls

Activity history is stored here

The screenshot displays the FPS-Ultimate CRM interface with the 'ACTIVITY' tab selected. A red circle highlights the 'Email' button and the 'Write an email...' text input field. Below this, the 'Activity Timeline' section is visible, showing 'Next Steps' and 'Past Activity'.

Activity Timeline

Next Steps

- ☐ Set Up 5th Arranged Call/Online Meeting: Send Email & SMS Dec 6
- ☐ Set Up 10th Arranged Call/Online Meeting: Send Email & SMS Dec 6

Past Activity

- Hwy 55 Franchise: Our upcoming intro call
Pro Prospector sent an email to Steve Ford 5:00 AM | Dec 18
- Hwy 55 Franchise: Our upcoming intro call
Pro Prospector sent an email to Steve Ford and 1 other 4:58 AM | Dec 18
- Hwy 55 Franchise: Our upcoming intro call
Pro Prospector sent an email to Steve Ford and 1 other 4:57 AM | Dec 18
- Pardot Misc Email: The Hwy 55 Difference
Pro Prospector had a Task Dec 12
- Pardot Misc Email: The Real Hwy 55 Difference
Pro Prospector had a Task Dec 5

FPS-Ultimate CRM in Action

Sending a 1:1 Email

1. Click Compose
2. Write your own email or select a template
3. Click Send

DETAILS **ACTIVITY** SMS CONVERSATIONS

Email New Task New Event Log a Call

Write an email... **Compose**

Filters: All time • All activities • All types

Email New Task New Event Log a Call

* From Franchise Pipeline Solutions <paul@franchisepipelinesolutions.com>

To Steve Ford

Bcc paul@franchisepipelinesolutions.com

Subject Test Email

Font Size **B** **I** **U** **A**

Write your email here.

Insert Email Template

Select a template for: Contacts Leads

My Templates

Search templates...

M1.FOLLOWING WEBSITE TERRITORY REQUE...	Send following territory request from website on whet...	Pro Prospector	2017-11-23	Delete
L1.DISCOVERY DAY EMAIL	Post Territory Call - Discovery Day email	Pro Prospector	2017-11-23	Delete
K1.FDD CALL REMINDER	FDD Call Reminder Day Before	Pro Prospector	2017-11-23	Delete
J1.PRE-FDD REVIEW CALL	Day of FDD and Agreement Review Call	Pro Prospector	2017-11-23	Delete
I1.PRE TERRITORY CALL REMINDER	Pre-Territory call reminder	Pro Prospector	2017-11-23	Delete
H1.PRE TERRITORY CALL	Pre-Territory call Prep Following Leadership Call	Pro Prospector	2017-11-23	Delete

Send

Cancel

FPS-Ultimate CRM in Action

Auto-Drip Emails

Can be sent over time to all your leads and link back to your website. All actions are tracked and scored for each lead.

Hwy 55 Franchise | reg@hwy55.com | hwy55.com

Hwy 55: Growing on Passion, Perseverance and Fortitude since 1991

Hello Paul,

It was another late, late night among many for Kenney and CEO of Hwy 55 Burgers Shakes & Fries. The year this night, everything changed.

Feeling low, making of dreams and passion and missed the well-being of his family, Kenney heard a still, small whisper: "It's not about you". Frustrated, struggling to find work and passion wasn't enough to get him over himself to that point and it flipped his world upside down.

An Epiphany Turns Hwy 55 Upside Down

Kenney began pouring his prodigious energy into his associates before turning about himself. He came to his epiphany with an almost evangelical zeal to serve our order hand-crafted fresh meals day after day. And his associates to become the best person they can be? We forget "all about you" amazing things happen.

People and Service Drive Business Strategy at Hwy 55

So what makes Hwy 55 a special place? Simple: great concepts rooted in a company culture devoted to making experiences delightful for guests. Each day better than the last. Fast, fun and tasty. We've discovered the care of our people and at turn they deliver our guests food and a "come on back and see us again" attitude.

Growth Powered by a Proven Business Model

We've on a growth path with over 1,000 locations open development. We're ready to expand our footprint for national and international expansion. A proven (25+ years of constant improvement) and ready for a night home.

What's different with us? It's the WDW. First associate delicious meals and when someone interest in our guests "Love Your Neighbor". So hard like "putting your self" extraordinary outcomes in your life.

If your heart can seek that way, then you'll fit in here and let's talk about it.

[Schedule Call](#)

All the best in your search Paul.

Guy Guthrie
Senior VP
Franchise Development
Text Me: 919-299-0191
Office: 919-635-0902 X116

PS Check out our [website](#) Paul. ... And when you're ready, use the [Schedule Call](#) button to arrange a chat.

Previous Email for Paul
[Hwy 55 Introduction](#) | [Our Road, Our Future](#)

Hwy 55 Burgers Shakes & Fries, 102 Commercial Ave, 28365
If you no longer wish to receive commercial e-mails, please select the following link: [Remove](#)

[Schedule Call](#)

Hwy 55: What Makes Us!

Hello Paul,

Why invest in Hwy 55 with so many other food to What have we learned after over 25 years that we energy and investment?

HERE'S THE OFFICIAL STORY: But skip ahead for a special.

Hwy 55 Burgers Shakes & Fries is a '50s retro feature fresh, never-frozen hand-patted hunk cheeseburgers, house-made french custard, all [Specials](#) (cheesesteaks, hot dogs, fries and sh open-kitchen setting. Founded in Goldsboro, NC reflects founder Kenney Moore's commitment to hospitality and fresh food.

Your Hwy 55 has includes distinctive signage, exterior design, floor and color scheme. You'll special recipes and items, including proprietary ingredients.

Restaurant operations are governed by uniform specifications and procedures to deliver quality product and guest experience. In addition, we teach inventory management and financial co including Point-of-Sale and tracking systems.

A comprehensive marketing and [social media](#) advertising and promotions drive traffic and to

We've won BurgerBusiness.com's "Best Burger" the second consecutive year. Hwy 55 was named Franchise 500 in the United States by Entrepreneur Magazine Business Review acknowledges us as Franchise in the country and Nation's Restaurant "Hot 20" restaurant brand.

Hwy 55 currently has over 120 locations in the internationally and has continued to add 1,000 locations over the next decade.

OK, almost everyone you consider will have to

Here's the Really Good Stuff

Over 25 years of growing our associates, over 25 ways to love the neighbors, over 25 years of food "it's not about you" and earning that performance always explaining "why" to our associates, over 2 authentic, interest in our guests and managing live down to the smallest detail, resulting in a dining a visual feast, and when done with, year-over-year restaurant at a time.

We don't think it's all about us. We invest our time consistently delivering a better guest experience and shipping more motivated front-line associates ("grazers") i.e. cooks and "pink ladies" (ie. wait staff).

That investment is returned a thousand fold to our franchisees. We act on our values every day, not just talk about them.

At the end of the day, we've learned how to deliver a dining experience every guest deserves but low experience. Our value proposition is outstanding.

So in your journey for a franchise restaurant concept with enduring value, we hope you'll check us out.

[Schedule Call](#)

All the best in your search Paul.

Guy Guthrie
Senior VP
Franchise Development
Text Me: 919-299-0191
Office: 919-635-0902 X116

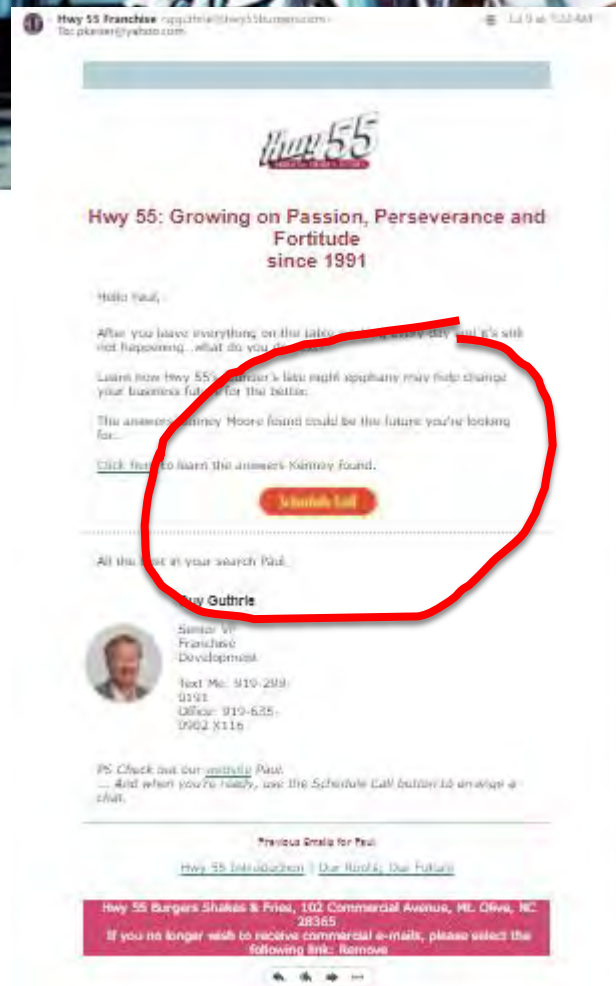
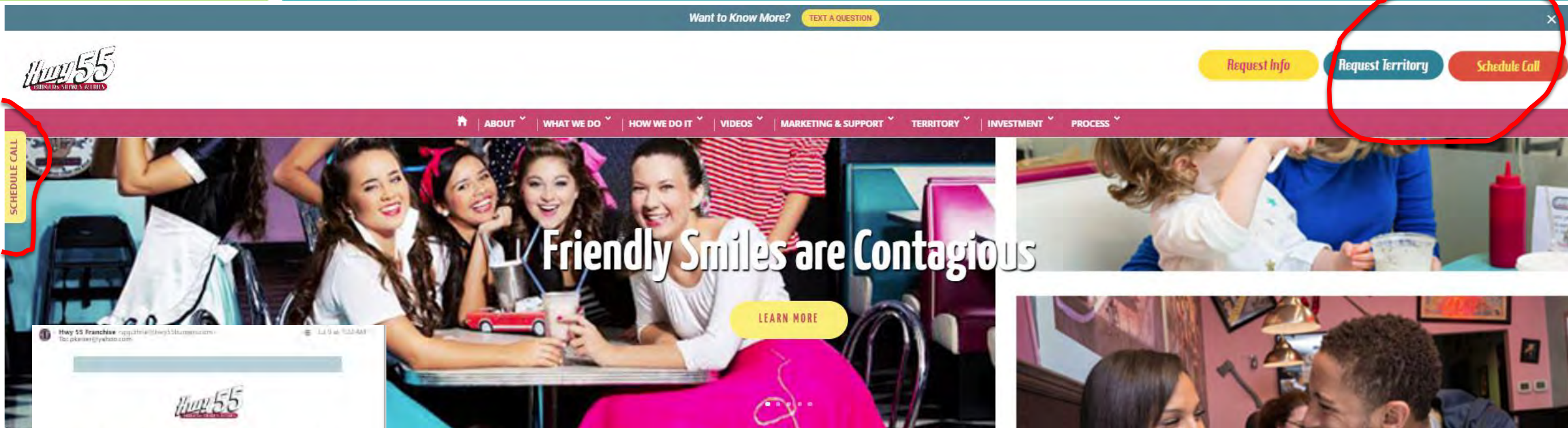
PS Check out our [website](#) Paul. ... And when you're ready, use the [Schedule Call](#) button to arrange a chat.

Previous Email for Paul
[Hwy 55 Introduction](#) | [Our Road, Our Future](#)

Hwy 55 Burgers Shakes & Fries, 102 Commercial Ave, 28365
If you no longer wish to receive commercial e-mails, please select the following link: [Remove](#)

[Schedule Call](#)

FPS-Ultimate CRM in Action



Auto-Appointment Scheduler

Schedule Call button appears in every email and on your website. Leads can easily schedule a call with your recruiter instead of chasing each other down to coordinate a good date and time



FPS-Ultimate CRM in Action

1

Hwy 55 Franchise

Hwy 55: Growing on Passion, Perseverance and Fortitude since 1991

After you leave everything on the table working every day and it's with not happening... what do you do next?

Learn how Hwy 55's founder's life might actually help change your business future for the better.

The answers to Hwy 55's success could be the answer you're looking for...

[Click here to hear from answerer Kimmy Roud.](#)

[Schedule Call](#)

All the best in your search for...

Guy Guthrie

Senior VP
Franchise Development

Text Me: 919-299-0191
Office: 919-635-0902 X116

PS: Check out our [contact](#) Page... And when you're ready, use the [Schedule Call](#) button to arrange a chat.

Previous Order for You:

Hwy 55 Introduction | Our Story | Our Future

Hwy 55 Burgers Shakes & Fries, 102 Commercial Avenue, NC, Olive, NC, 28365

If you no longer wish to receive commercial e-mails, please select the following link: [Remove](#)

Hwy 55 Franchise Conversation

2

Hwy 55
BURGERS SHAKES & FRIES

I look forward to learning about you and your business objectives and introducing you to our Hwy 55 Burgers Shakes & Fries franchise opportunity.

Please note that we're reserving an hour for our call, but it may run shorter or a bit longer.

Simply click continue and select a day/time that works for you. You'll receive an appointment confirmation and I'll call you at the number you provide.

Look forward to talking with you soon.

Guy Guthrie
Senior VP
Franchise Development

Text Me: 919-299-0191
Office: 919-635-0902 X116

powered by [timetrade](#)

[Continue](#)

Select Date and Time

3

August 2016

Week Month Time Zone (-06:00) Central Time

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

12 Available

9:00 AM

4

Auto-Appointment Scheduler

1. Lead clicks Schedule Call
2. Greeting/Instructions
3. Recruiter calendar pops up
4. Lead selects date/time
5. Lead fills out call form
6. Appointment confirmed and entered into your calendar

Provide Information

5

First name * Last name *

Katie Snelling

Email *

katie.snelling@frs ltd.co.uk

Phone Number *

(954) 266 6774

Company

Comments

I'd like to know firstly if there is an area available...

Appointment Confirmed

Friday, August 26, 2016
9:00 AM - 9:15 AM
Central Time

Confirmation # 6978063
SCHEDULED

Instructions
Mike Mallory will call you at (954) 266 6774

Appointment Type 15 Minute Phone Call

Call With Mike Mallory

Your Information Katie Snelling
katie.snelling@frs ltd.co.uk
(954) 266 6774

Comments
I'd like to know firstly if there is an area available...

[Add to Calendar](#)

6

FPS-Ultimate CRM in Action

Pipeline Metrics

- Over 20 Lead Views and Reports
 - Contact Status
 - Current Pipeline Stage
 - Milestone Summary
- Easy to Tailor

Leads
Milestones ▼

RECENT LIST VIEWS

- All Leads
- Current Pipeline Stage
- Lead Score 25-49
- Leads with Zero Score
- ✓ Milestones
- Open Leads Contact Status
- PCJ New Leads
- Recently Viewed
- This Week's Leads

ALL OTHER LISTS

Reports
[All Folders](#) > Hwy 55
50 items

REPORTS	NAME ↑	DESCRIPTION
Recent	A. All Leads by Origin	New and Historic
Created by Me	A. Leads by Origin	This report shows where leads have made an enquiry
Private Reports	A1. Historic Leads by Origin	Only historic leads
Public Reports	B. Lead Status: Contacted. Attempted	This summarises which leads have been contacted or atte...
All Reports	B1. Lead Status: Contacted. Attempted. HIST	This is only historic leads
	C. Total Leads Contacted	This is basically a summary of any leads where a 2-way, no...
	D. Status Type: Interest. No Interest	This shows how many leads are interested after contact is ...
FOLDERS	D. StatusTypeInterestNoInterestAllLeads	Includes new and historic leads
All Folders	Dashboard: Leads by Current Month	This is a static report to show leads in the current month
Created by Me	E. Current Status: Qual. Early Disqual.	Of those leads contacted, this shows how many are qualifi...
Shared with Me	E. CurrentStatusQualEarlyDisqualAllLeads	Includes new and historic leads
FAVORITES	F. Lead Rating: Hot. Warm. Cold	This report summarises the pipeline based on lead rating ...
All Favorites	F. Lead Rating: Hot. Warm. Cold All Leads	Includes new and historic leads
	G. Conversations Held	This shows total leads that have actually been spoken to ...
	H. Conversations Booked Online By Leads	This shows a breakdown of conversations scheduled onlin...
	Hwy 55 Historic Leads	
	I. Conversations Not Booked Online	This shows all leads where an initial conversation was held...
	J. No. Of Scheduled Conversations Held	This shows the percentage of leads who scheduled a call ...
	K. Leads Who Agreed To Attend Meeting	This shows status of any meetings arranged (not necessari...
	L. Leads Who Attended A Meeting	This only shows leads who have actually attended a meeti...
	M. Meeting Attended - Still An Interest	This shows all leads who have attended at least 1 meeting...

FPS-Ultimate CRM in Action

Integrated 1:1
Text Messaging

1. To compose and send a personal text message, click Send SMS or SMS Conversations

2. Compose using a template or write your own text message

3. Click Send SMS

Lead Details: Steve Ford (Lead), Following, Edit, Send Email, Send SMS

Pardot Score	Pardot URL	Phone(2)	Lead Origin	Pardot Last Activity	Email
143	http://pi.pardot.com/prospect/read?id=60324943	(630) 697-4952	TEST	12/3/2017 12:28 PM	steford1976@gmail.com

SMS Compose Step 1:

Please select the phone field: Mobile Phone
Selected field value: 6306974952
Sender Id: 1312229550
SMS Template: Please select the template (highlighted)
You have used 0/700 characters.
SMS Text: Enter SMS Text
Buttons: Send SMS, Cancel

SMS Compose Step 2:

SMS Template: High Scores Schedule A Call
SMS Text: Reminder Generic Call tomorrow
New lead SMS about SPAM folder
High Scores Schedule A Call
Please select the phone field: Mobile Phone
Selected field value: (252) 367-0827
Sender Id: 1312229550
SMS Template: High Scores Schedule A Call
You have used 168/700 characters.
SMS Text: Hi (Lead.firstname), let's set up a chat about the (Lead.leadsource) franchise opportunity. Click [INSERT YOUR TIMETRADE LINK] to schedule... Thanks, (User.firstname)
Buttons: Send SMS (highlighted), Cancel

Sample SMS Message:

Monday, November 13th at 10:21 am

Hi Steven, thanks for your inquiry into the Hwy 55 franchise. I have just sent you an email with more info. Check your spam/junk folder if you do not see it. Tap <http://bit.ly/2ApEmwu> if you want to chat. Thanks, Guy Guthrie

FPS-Ultimate CRM in Action

Integrated Bulk
Text Messaging

1. From Lead View, select leads to receive a bulk text message; then select: New Bulk SMS

Leads Lead Score 100+ 4 items selected

1 2 3 4

CREATE...	NAME	PARD...	MOBILE	LEAD STATUS	STATUS	CURRE...	RATI...	CITY	LEAD O...	PARD...
9/12/2...	Dennis Trotter	163	(832) 6...	Contacted	Interest...	Early St...	Luke...	Houston	Franchis...	7/10*
3/10/2...	Sachin Patel	190	(848) 2...	Contacted	Interest...	Early St...	Warm	Nashville	hwy55b...	12/8
4/3/20...	Jack Killion	151	+1 603...	Contacted	Interest...	Qualified	Hot	Holderness	franchis...	9/1/
10/4/2...	Tim Jittu	178	+1 808...	Contacted	Interest...	Qualified	Hot		franchis...	12/3

2. Write your own text or use a text template

Info Send SMS to 4 selected number(s).

Recipients (4)

Name	Phone Field Type	Mobile Phone	Action
Dennis	MobilePhone	(832) 638-6040	X
Jack	MobilePhone	+1 6032544006	X
Sachin	MobilePhone	(848) 219-9427	X
Tim	MobilePhone	+1 8089379743	X

Compose Message

Sender Id: 13122229550

Message Text: Please enter some text.

Use Templates: Please select a SMS Template

- Please select a SMS Template
- Confirmation 1st Meeting Email Sent
- High Scores Schedule A Call
- Look for
- Nudge for Lead Scores over 25**
- Reminder Call today
- Reminder Generic Call tomorrow
- Reminder - Application (email sent)
- Reminder - Application (return tomorrow)
- Reminder - Intro Call (email sent)
- Reminder - Territory Call (email sent)

3. Click Send

Compose Message

Sender Id: 13122229550

Use Templates: Nudge for Lead Scores over 25

Message Text: 271/700

Hi {!Lead.firstname}, Thanks again for your interest in the {!Lead.leadsource} franchise. Are you receiving the emails I've sent? If not, please reply so I can make sure you receive them. You can also reply to schedule a call at your convenience. Thanks, {!User.firstname}

Send to Optout members

Cancel Schedule Send

FPS-Ultimate CRM in Action

Track Your 1:1 Text Messaging

Send unlimited texts via
SMS Conversations

All texts to and from a
lead, sent from your
desktop or mobile
device, are found here

The entire SMS history is
stored and viewable in
SMS Conversations

DETAILS ACTIVITY **SMS CONVERSATIONS**

14 Nov 13 2017

Hi Steven, thanks for your inquiry into the Hwy 55 franchise. I have just sent you an email with more info. Check your spam/junk folder if you do not see it. Tap <http://bit.ly/2ApEmwu> if you want to chat. Thanks, Guy Guthrie

Guy Guthrie • Workflow 11:21 AM

Thu Nov 16 2017

Hi Steven, Quick reminder of our call tomorrow about Hwy 55. Please reply to reschedule. Thanks. Guy.

Guy Guthrie 03:35 PM

Hi Steven, Quick reminder of our call tomorrow about Hwy 55. Please reply to reschedule. Thanks. Guy.

Guy Guthrie 03:35 PM

Fri Nov 17 2017

Hi Steven, Reminder: look for my email about our scheduled FDD review call. Please reply to reschedule. Thanks. Guy.

Guy Guthrie 11:47 AM

Tue Nov 21 2017

Hi Steve, Thanks again for your interest in the Hwy 55 franchise. Are you receiving the emails I've sent? If not, please reply so I can make sure you receive them. You can also reply to schedule a call at your convenience. Thanks, Guy

Guy Guthrie 10:35 AM

All emails received. Thanks

10:36 AM

Wed Nov 29 2017

Schedule a Call with Me

Paul Keiser

630-697-4952

paul@franchisepipelinesolutions.com

Franchise Pipeline Solutions