



FASA Awards Questionnaires 2010

Franchisor of the Year

Category 3

INSTRUCTIONS

- Please read the following questions carefully before answering it
- The questionnaire and Annexures should be submitted in a file which must clearly indicate the name of the franchisor, franchisee (where applicable) and category
- You will also have to attach relevant documentation as Annexures where applicable
- The Annexures should be clearly marked as Annexure A, B ext. after the questionnaire and not be an integrated part of the questionnaire – please use partitions for the Annexures
- No marks questions are optional and no points are allocated (included for statistical reasons only)
- All information will be considered as strictly confidential
- Please make and send in 4 hard copies to the judges – no e-mails or faxes will be accepted.
- All marketing material should be collected not later than 1 week after the final awards from FASA's offices. Any material not collected within the allocated time period, will be destroyed. FASA cannot be held responsible for any losses whatsoever.

Part 1: Requirements

The objective of this award is to give recognition to the company that have shown its commitment to sound ethical franchising through training, marketing, effective business management, growth and overall contribution to the franchise industry and FASA.

Identification

a) Brand name

b) Franchisor's trading name

c) Contact person at franchisor

d) Title

e) Cellular phone

f) Work phone

g) Postal address

Part 2 Questionnaire

1. Background

1.1 Type of industry

1.2 Stage of industry development (new; growing; mature)

1.3 Number of years in Franchising

1.4 Number of years as FASA member

2. Ethics

2.1 How do you understand the concept of "ethics in business"? Motivate your answer in not more than 5 bullet sentences with references to your own policies and procedures

2.2 Do ethics form part of your training schedule? (Add evidence as 1 pager from training manual Attached as ANNEXURE A)

3. ROI

3.1 What was your franchisees average return on investment (as a total average in column ROI %) at output level for 2009? Include list of evidence indicating ROI per store

ROI %	ADMIN USE ONLY POINTS AWARDED Scale: 0-5% = 1 point 6-10% = 2 points 11 – 15 % = 3 points 16 – 20 % = 4 points +21% = 5 points

3.2 List of evidence indicating ROI per store

Name of store	ROI per store	ADMIN USE ONLY POINTS AWARDED YES = 3 if the list exists NO = 0

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4. What was the average net growth of the franchisees for 2009?

Net Growth rate	ADMIN USE ONLY POINTS AWARDED Scale: 0-10% = 1 point 11-20% = 2 points 21-30% = 3 points 31 - 40 % = 4 points +41% = 5 points

5. Please indicate the outlet movement summary of the Company by completing the following table. (No points only for statistical reasons)

Outlet Summary	1 Jul 2008 to 30 Jun 2009			1 Jul 2007 to 30 Jun 2008		
	Franchised	Co owned	Total	Franchised	Co owned	Total
Number of outlets 1 Jul A						
New outlets opened B						
Outlets sold/transferred C						
Relocated D						
Closed E						
Defranchised F						
Number of outlets 30 Jun A+B-E-F = Total						

6. Benchmarking - Financial management and support

6.1 Are financial benchmarks set for the franchise network? (PLEASE TICK)

Yes 1	No 0	ADMIN USE ONLY POINTS

6.2 Do you intervene when franchisees are perceived to be in financial difficulty? (PLEASE TICK)

Yes 1	No 0	ADMIN USE ONLY POINTS

6.3 Extent of financial assistance to franchisees (PLEASE TICK ALL THAT APPLY)

Assistance	Yes (✓ if applies)	% Franchisees Assisted	ADMIN USE ONLY POINTS Yes = 1 point No = 0 points 0-20% = 1 point 21-40% = 2 points 41-60% = 3 points 61-80% = 4 points 81-100% = 5 points
Set recommended gearing			
Assist in finance access from financial institutions			
Assist in compilation of franchisee business plans			
Assist in accounts management (formatting, compiling etc.)			
Business Advisor sent in			
Franchisee training at successful franchise			
Legal documentation			
Partnering with successful franchise			
Other			

7. % of HO staff dedicated to franchise outlets

	No marks
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8. Number franchise consultants

	No marks
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9. Frequency of visits by franchise consultants to outlets (PLEASE TICK THE ONE THAT APPLIES)

Frequency	Please tick	Admin Use Only NO POINTS AWARDED NO marks
Weekly		
Fortnightly		
Monthly		
Quarterly		
Bi-annually		
Annually		
Never		

10. Mark in the appropriate block if the activity report that is used at an outlet visit is attached (ATTACH AS ANNEXUREB)

Yes	No	ADMIN USE ONLY
1	0	POINTS

11. Please provide the percentage of franchisees assisted in each area of support in 2009

Area of support	Yes (✓ if provided)	% Franchisees Assisted in 2007	ADMIN USE ONLY POINTS AWARDED Yes = 1 point No = 0 points 0-20% = 1 point 21-40% = 2 points 41-60% = 3 points 61-80% = 4 points 81-100% = 5 points
Product procurement			
Pricing			
IT			
Operational/Technical			
Human Resources			
Labour relations			
Supply chain management			
Negotiation of prices from suppliers			

12. Communication

What methods of communication forums are used in your group

Communication	Yes (√ if held)	ADMIN USE ONLY POINTS AWARDED Yes = 1 point No = 0 points
Conferences		
Electronic bulletin boards		
Franchise council		
In house newsletter		
Intranet postings		
Meetings at franchisee		
Meetings at franchisor		
Workshops		

13. Please provide copy of franchise newsletter, if published. PLEASE TICK IF REPORT IS ATTACHED (MARK AS ANNEXURE C)

Yes	No	ADMIN USE ONLY POINTS
2	0	

14. Training

14.1 Please tick the areas in which you provide courses in the column below

14.2 Please indicate, in days/weeks (please specify), how long these courses are

14.3 Please provide percentages of number of franchisees who have attended these courses

Course	14.1 (tick) Yes = 1 point No = 0 points	14.2 Duration (in days) (no points)	14.3 % Franchisees participated in courses 0-20% = 1 point 21-40% = 2 points 41-60% = 3 points 61-80% = 4 points 81-100% = 5 points	ADMIN USE ONLY POINTS AWARDED
<i>Management courses</i>				
Business management				
General financial management				
Management development				
Staff management				
Supply chain management				
<i>Marketing courses</i>				ADMIN USE ONLY POINTS AWARDED
Advertising & Promotion				
Customer satisfaction				
Personal motivation				
Product knowledge				
<i>Other</i>				ADMIN USE

				ONLY POINTS AWARDED
Systems training (computer)				
Other (Please specify)				

15. Franchisee assistance on start-up

15.1 Does a cooperation agreement exist between the franchisor and financial service providers to finance franchisees (PLEASE TICK)

Yes 1	No 0	ADMIN USE ONLY POINTS

15.2 Does the cooperation have a risk management plan (PLEASE TICK)

Yes 1	No 0	ADMIN USE ONLY POINTS

15.3 Did you support start-up franchisees during the past year? (PLEASE INDICATE IN THE COLUMN PROVIDED)

Activities	Yes (✓ if provided)	ADMIN USE ONLY POINTS AWARDED Yes = 1 point No = 0 points
Turnkey operation		
Site selection and feasibility		
Lease negotiations		
Estimated number of customers		
Estimated proximity to competitor outlets		
Guarantee of no competing franchises from same brand in customer catchments area		
Plans and store construction		
Hiring of staff & training		
All administration systems		
Initial hands-on franchise support		
Opening promotions		
Franchise consultant at franchisee for few days		

Availability of HO team		
Time available at another existing franchise		
Guidance in compilation of business plan		
Facilitation of financial application		

16. Has any market research been done regarding your consumers? (PLEASE TICK)

Yes	No	ADMIN USE ONLY
1	0	POINTS

17.If yes, was this information provided to your franchisees? (PLEASE TICK)

Yes	No	ADMIN USE ONLY
1	0	POINTS

18.Was any research done on how you as franchisor was perceived by your franchisees?
(PLEASE TICK)

Yes	No	ADMIN USE ONLY
1	0	POINTS

19. If yes, was this information provided to franchisees? (PLEASE TICK)

Yes	No	ADMIN USE ONLY
1	0	POINTS

20. Do you do research at the request of your franchisees? (PLEASE TICK)

Yes	No	ADMIN USE ONLY
1	0	POINTS

21.Awards and Incentives

21.1 Do you have an internal awards programme? If so, please give details IN BULLET FORMAT

	ADMIN USE ONLY POINTS AWARDED
	5
	POINTS
	IN
	TOTAL

The following rubric serves as a guideline to assess:

1	2	3	4	5
A poor and minimal effort to describe the programme	A vague and incomplete description of programme	A satisfactory description of programme	A proficient description of programme	An excellent description of programme

21.2 Do you have incentives based on performance? If so, please give details IN BULLET FORMAT

	ADMIN USE ONLY POINTS AWARDED
	5
	POINTS
	IN
	TOTAL

The following rubric serves as a guideline to assess:

1	2	3	4	5
A poor and minimal effort to describe the events	A vague and incomplete description of events	A satisfactory description of events	A proficient description of events	An excellent description of events

22. Marketing

22.1 Do franchisees participate in the developing of marketing plans? If so, please give details IN BULLET FORMAT

	ADMIN USE ONLY POINTS AWARDED
	3
	POINTS
	IN
	TOTAL

The following rubric serves as a guideline to assess:

1	2	3
A poor and minimal effort to involve franchisees in the plans	A satisfactory effort to involve franchisees in the plans	A excellent effort to involve franchisees in the plans

22.2 Do you provide marketing assistance to franchisees? (PLEASE TICK)

Yes 1	No 0	ADMIN USE ONLY POINTS

22.3 If so, what form does this assistance take (PLEASE TICK ALL THAT APPLY)

	Yes 1	No 0	ADMIN USE ONLY POINTS
Financial			
Provision of materials			
Advice			
HO staff			
Other (Please specify)			

22.4 Which, if any, of the following marketing initiatives do you provide to your franchisees?
(PLEASE TICK ALL THAT APPLY)

	Yes 1	No 0	ADMIN USE ONLY POINTS
National advertising and promotions			
Regional advertising and promotions			
Promotional material			

23. Legal documentation

23.1 Do you have a valid and current disclosure agreement? (PLEASE TICK) Please attach a copy (MARK AS ANNEXURE D)

	Yes 1	No 0	ADMIN USE ONLY POINTS
Disclosure agreement			
Agreement attached			

24. Please provide a set of the promotional literature or a prospectus used in your dealings with prospective franchisees (PLEASE MARK AS ANNEXURE E)

	Yes 3	No 0	ADMIN USE ONLY POINTS
Promotional literature attached			

25. Do you have a valid and current operations manual? (PLEASE TICK) (MARK AS ANNEXURE F)

Yes 1	No 0	ADMIN USE ONLY POINTS

26. Please provide a copy of the contents page of your operations manual (PLEASE TICK AND MARK AS ANNEXURE G)

	Yes 1	No 0	ADMIN USE ONLY

			POINTS
Contents page attached			

27. Black Economic Empowerment

27.1 Do you have a rating certificate

Yes	No	ADMIN USE ONLY POINTS
5	0	

27.2 Do you have a policy on BEE ((PLEASE TICK). Attach a written copy of this policy (PLEASE MARK AS ANNEXUREH)

	Yes 3	No 0	ADMIN USE ONLY POINTS
Policy in place			
Agreement attached			

28. Expansion plans

28.1 Do you have a current business plan? (PLEASE TICK). Please attach a copy if yes (PLEASE MARK AS ANNEXURE I)

	Yes 3	No 0	ADMIN USE ONLY POINTS
Business plan			
Plan attached			

28.2 Do you have an expansion plan for your business? (PLEASE TICK). Please attach a copy if yes (PLEASE MARK AS ANNEXURE J)

	Yes 2	No 0	ADMIN USE ONLY POINTS
Expansion plan			
Plan attached			

29. Local community

29.1 Name the activities to indicate your involvement in the local community (Attach any evidence to ANNEXURE K)

	ADMIN USE ONLY POINTS AWARDED
	5
	POINTS
	IN
	TOTAL

The following rubric serves as a guideline to assess:

1	2	3	4	5
A poor and minimal effort to describe the events	A vague and incomplete description of events	A satisfactory description of events	A proficient description of events	An excellent description of events

30. Business Continuity Plans

30.1 Is there any agreement that determines what happens to the business if you as a franchisor or your partner dies or get disabled?

Yes 3	No 0	ADMIN USE ONLY POINTS

30.2 Do you encourage the franchisees to have any plans ready for the financing of key persons? (a key person could be any person in the business that will make it almost impossible for the business to continue if that person passes away, resign ext. e.g. a chef in a restaurant that makes the best food in town or the person that has all the know how of a particular product or manufacturing process)

Yes	No	ADMIN USE
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3	0	ONLY POINTS

31. Wealth creation

Does the business invest its profits from time to time

Yes 3	No 0	ADMIN USE ONLY POINTS

What would you consider as a good investment product or plan (optional)?

Product or plan	Reason

32. Employee benefits

Does the business provide for retirement benefits for its employees?

Yes 3	No 0	ADMIN USE ONLY POINTS

33. Did you as franchisor initiate an employee benefit plan for franchisees and their workers?

Yes 3	No 0	ADMIN USE ONLY POINTS

34. Support in respect of FASA

		ADMIN USE ONLY
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Support activity	Indicate with a tick	POINTS AWARDED Yes = 5 points No = 0 points
AGM attendance		
Golf day attendance		
Awards event attendance		
Nomination for council		
Workshops and networking events		
Advertisements web/newsletters/directory		
New members welcoming event		
Franchise convention		
Other – specify		

35. Motivation

35.1 Please tell us why you deserve to win this award. Your answer should be no longer than five sentence in bullet format and can be provided in the space below

	ADMIN USE ONLY POINTS AWARDED
	5
	POINTS
	IN
	TOTAL

The following rubric serves as a guideline to assess:

1	2	3	4	5
A poor and minimal effort to describe the events	A vague and incomplete description of events	A satisfactory description of events	A proficient description of events	An excellent description of events