FRM Solutions, Inc

Franchise Sales

Updated 06/23/2017

Contents

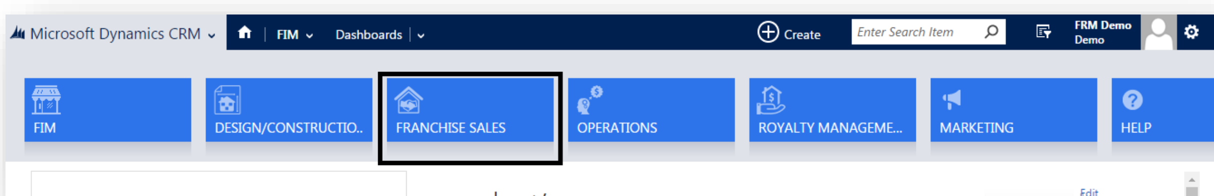
Introduction to Leads & Opportunities

Leads - Represent any inquiry submitted from somebody interested in opening a franchise location. Microsoft Dynamics CRM is used to facilitate the capture and storage of data for that lead. For instance, if your company receives an inquiry on your website contact form about opening a franchise location, you would use a Dynamics CRM lead record to collect and store information about that person or business.

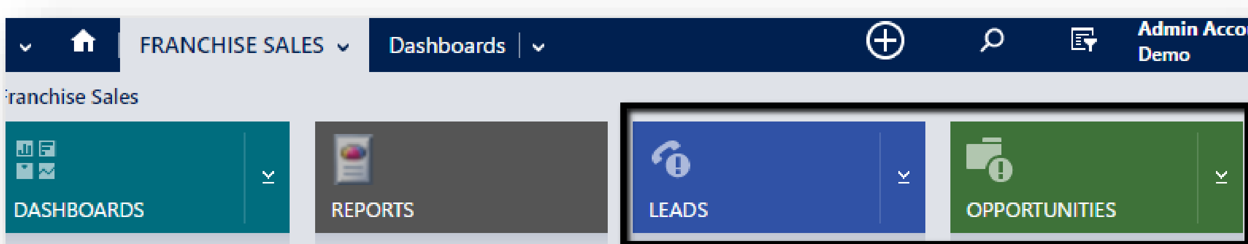
Opportunities - Opportunities in Microsoft Dynamics CRM are the core record in the sales process. Used by the sales team, opportunities represent a potential sale to a specific prospect or lead. The creation of an opportunity adds this potential sale to the sales pipeline and therefore puts it on the radar of the sales manager who may be holding the team responsible for the progress of opportunities. If purchased, the FRM Candidate portal will serve the purpose of providing a digital landscape for the prospect to move through as the progress through each Sales Stage.

Step by Step Process on how to identify Leads and Opportunities in FRM

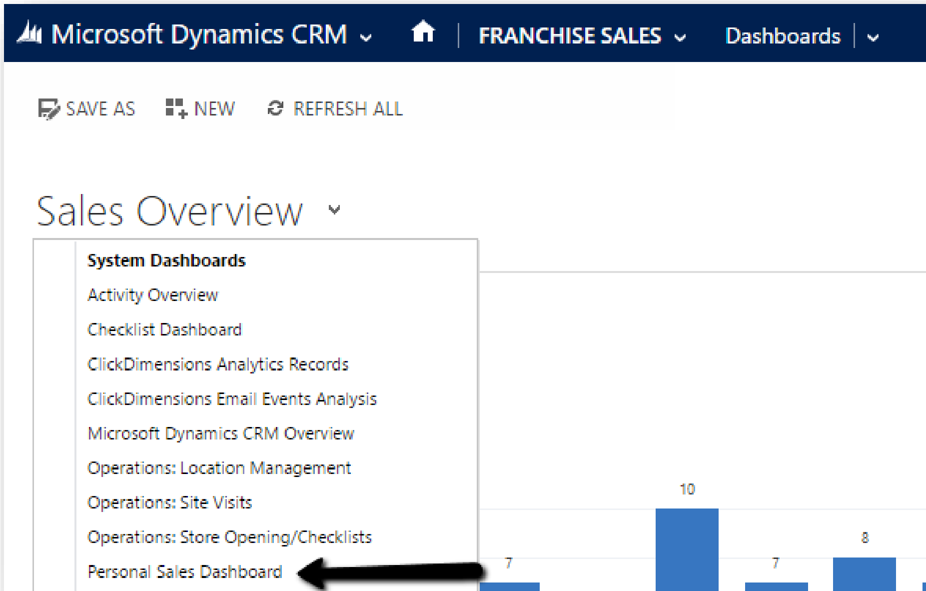
1. From the main page select Microsoft Dynamic CRM and Franchise Sales from the ribbon;



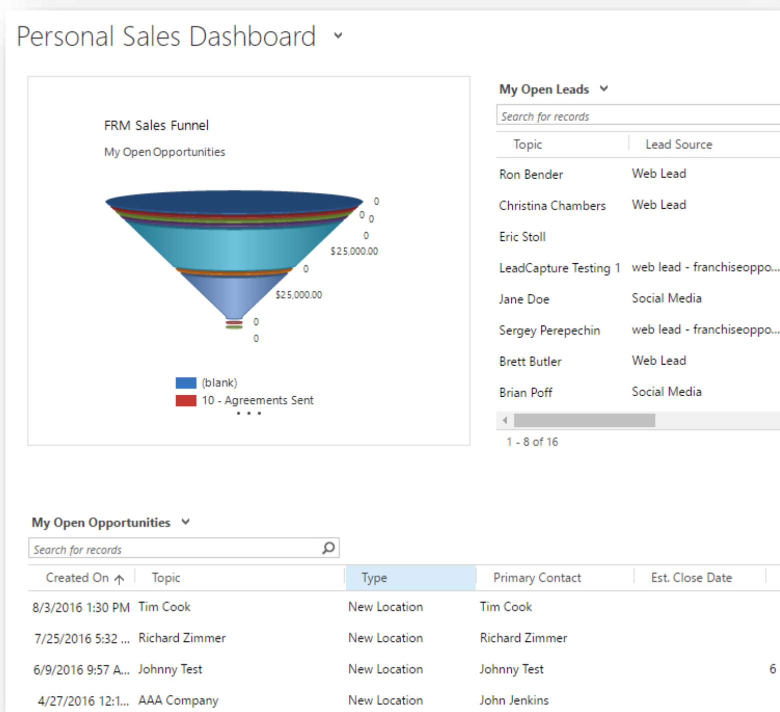
2. Leads and Opportunities can be accessed from the Lead and Opportunity Tiles indicated below:



3. The Personal Sales Dashboard will also serve as an invaluable resource for accessing your sales data. It can be accessed by selecting Dashboards from the ribbon and selecting Personal Sales Dashboard from the drop-down menu.



4. From here you can access and manage your Open Leads and Open Opportunities with ease.



Updating Opportunity Sales Stage

Sales representatives can update the progress of their opportunities by changing the Opportunity Sales Stage once a new action is taken on the opportunity (e.g. sending emails, setting up a new contact point, sending an FDD). Updating the Sales Stage on an opportunity accordingly to these actions will ensure a more organized and efficient process.

An example of Opportunity Sales Stages in FRM are below:

2 - Application Sent

3 - Application Received

4 - Marketing Material

5 - FDD Sent

6 - FDD Review

7 - Validation

8 - Discovery Day

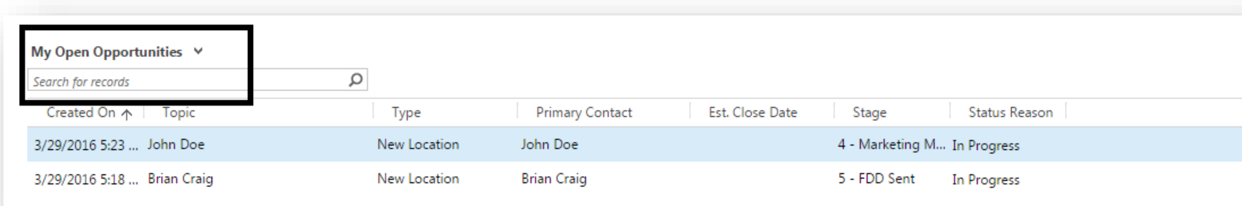
9 – Franchising Package Sent

10 - Agreements Sent

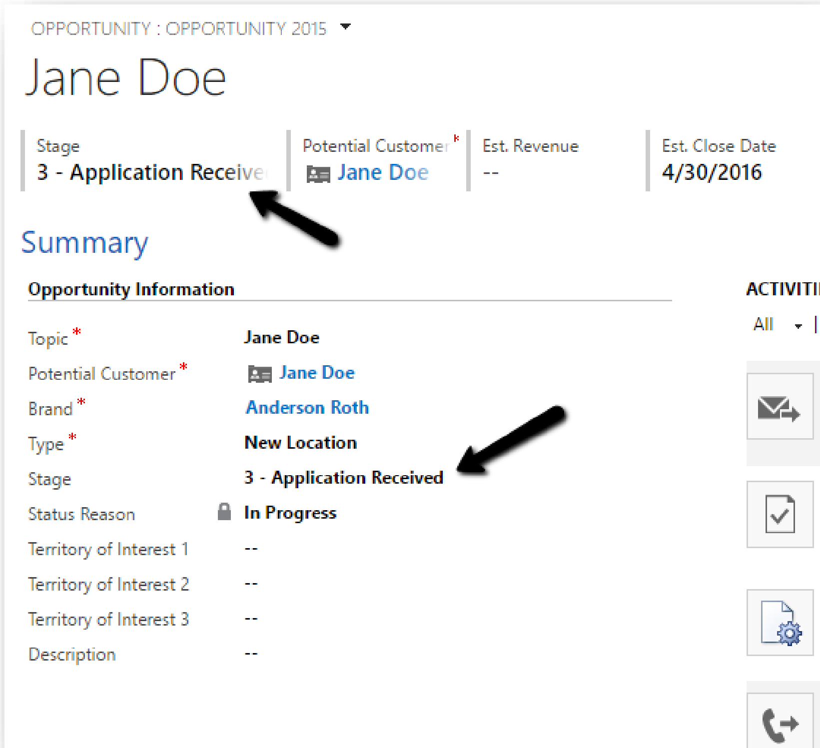
Step by Step Process on how to update Opportunity Sales Stage

1. You may update an Opportunity's Sales Stage by first selecting it from your Personal Sales Dashboard or by accessing Opportunities in the FRM Ribbon.

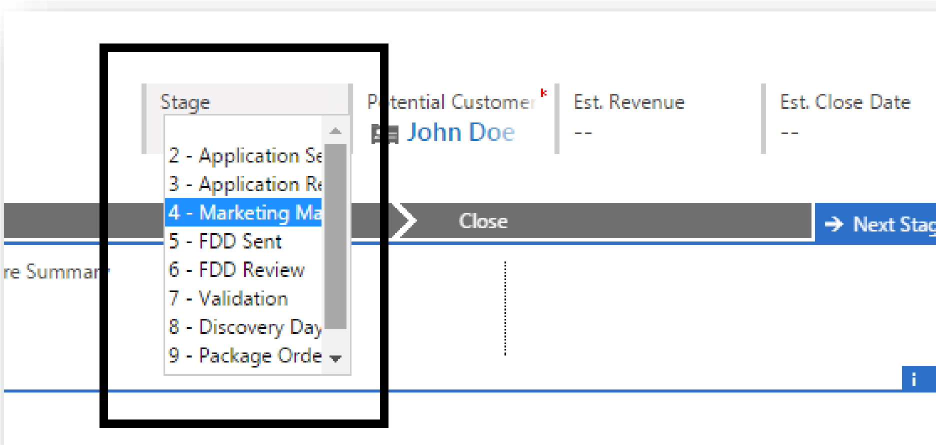
   From Personal Sales Dashboard:



2. The Opportunity Sales Stage can be updated from 2 locations as indicated below:



3. To change the current Sales Stage, select the new one from the drop-down.

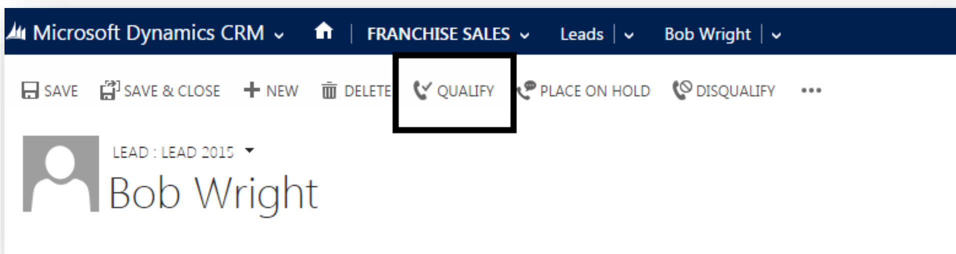


4. Once you have selected the new Sales Stage, click on the Save option in the upper left corner of the page to ensure your change is saved.

Updating Leads/Opportunities as Won, Lost or On Hold

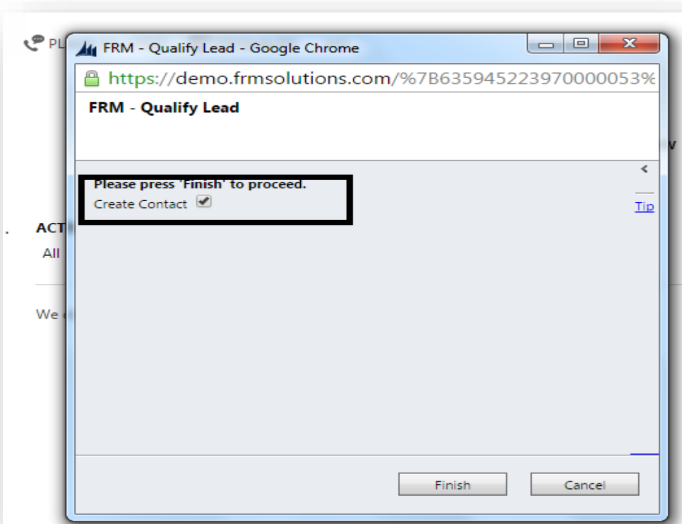
Qualifying a lead

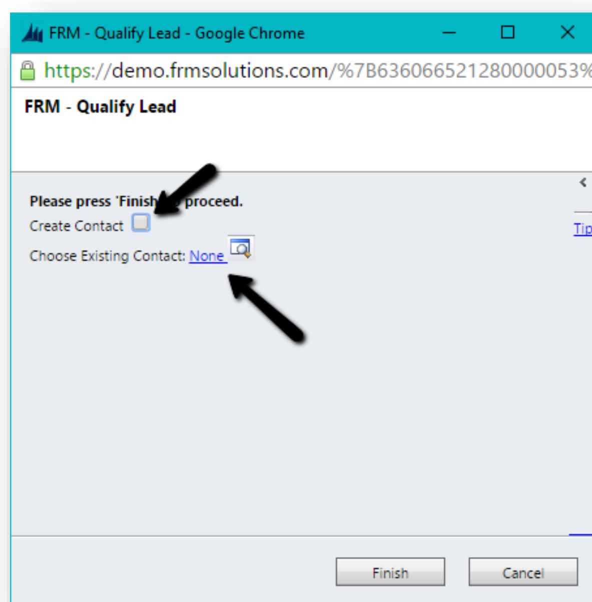
1. With the Lead record open you will notice three distinct buttons in the upper portion of the window (Qualify, Place On Hold, Disqualify). To qualify select the option Qualify from the upper left side of the lead page:



2. Once you click on the Qualify option, a new window opens up. Here you have the option to create a contact, which is already selected by default.

   Please Note: If this lead is already a contact within FRM you must uncheck this box and select the contact record that already exists for this individual preventing duplication of contacts within your system.

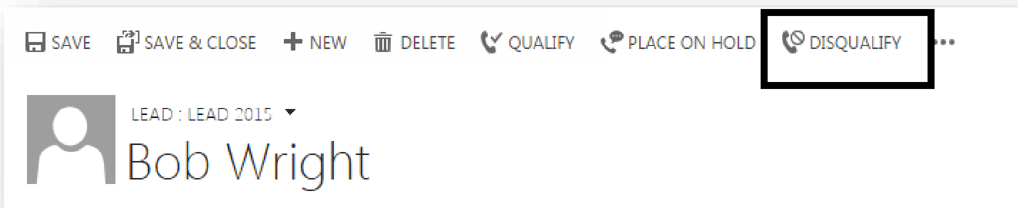




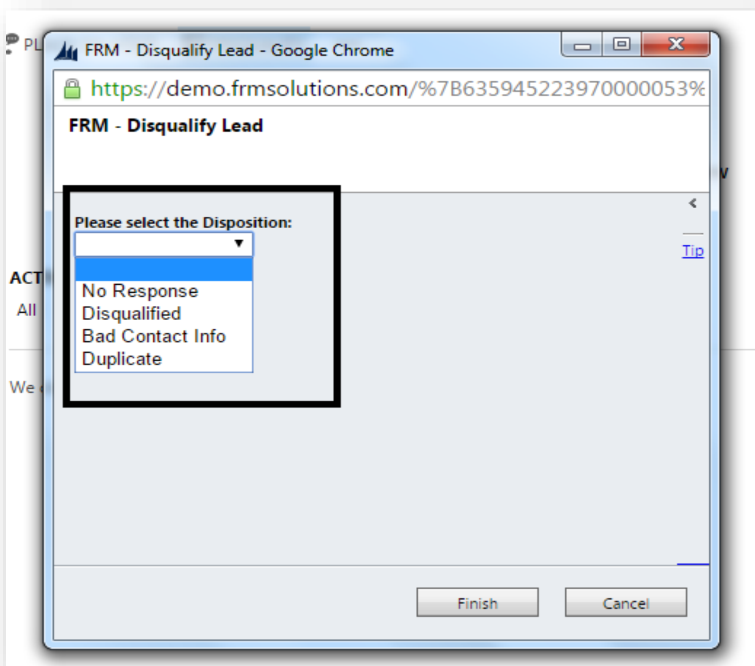
3. Click on **Finish** to qualify the lead.
4. Once the lead is qualified, the system will automatically create a contact record (if selected) and create an Opportunity based on that lead.

Disqualifying a lead

1. If you would like to disqualify a lead, select the Disqualify option from the upper portion of the lead record:



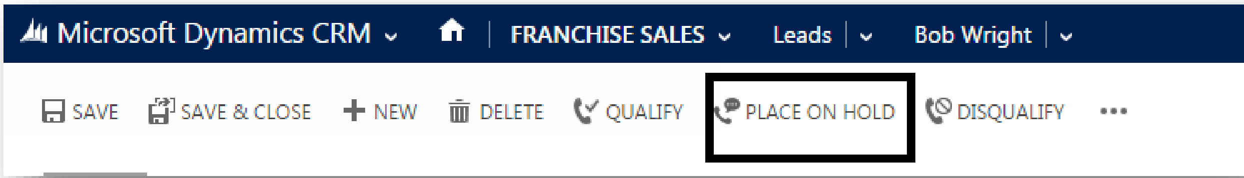
2. Once you selected on the Disqualify option, a dialog window will appear. Here you are required to choose a Disposition Reason for the disqualification, the below options are fully customizable to your needs:



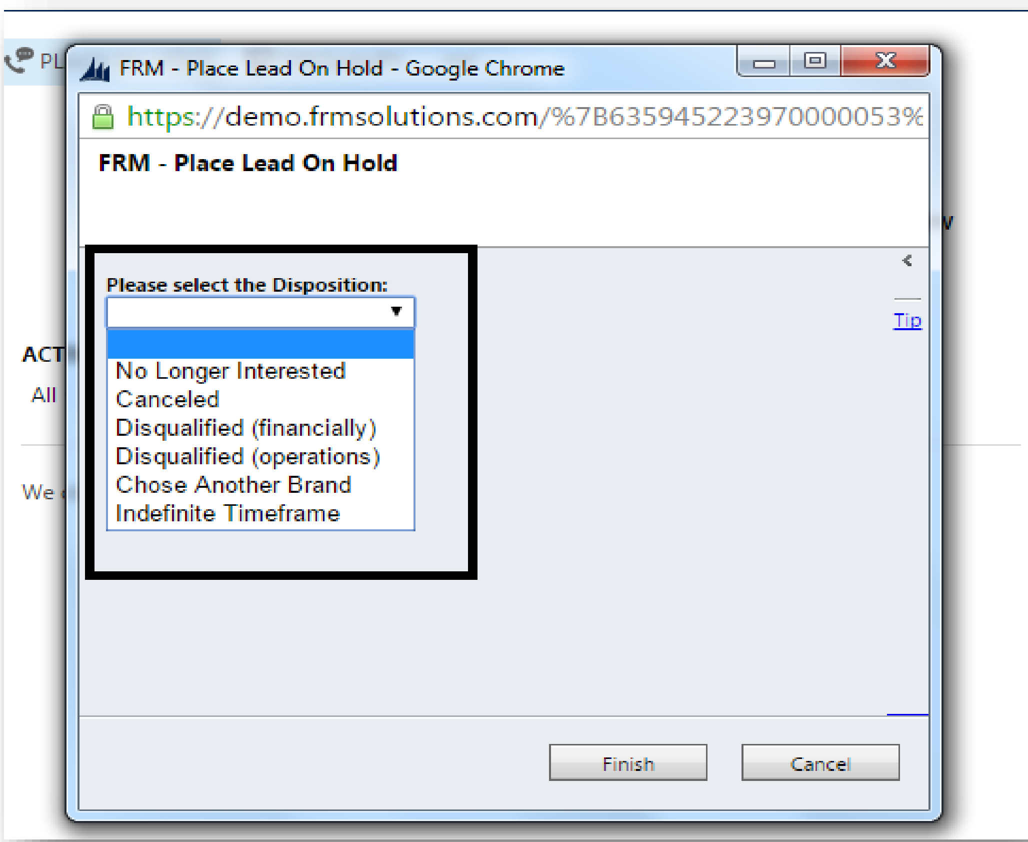
3. Click on **Finish** to complete the disqualification of the lead.

Placing a lead on Hold

1. If you would like to place a lead On Hold, select the On Hold option from the upper portion of the lead record:



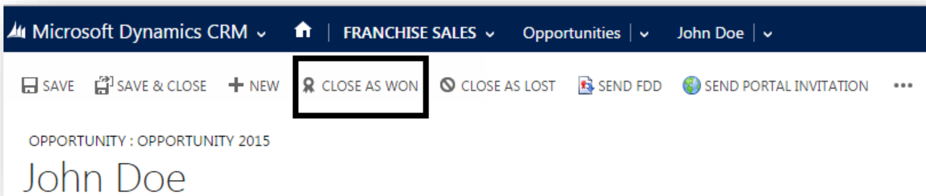
1. Once you selected on the Place on Hold option, a dialog window will appear. Here you are required to choose a Disposition Reason for placing the lead On Hold, the below options are fully customizable to your needs:



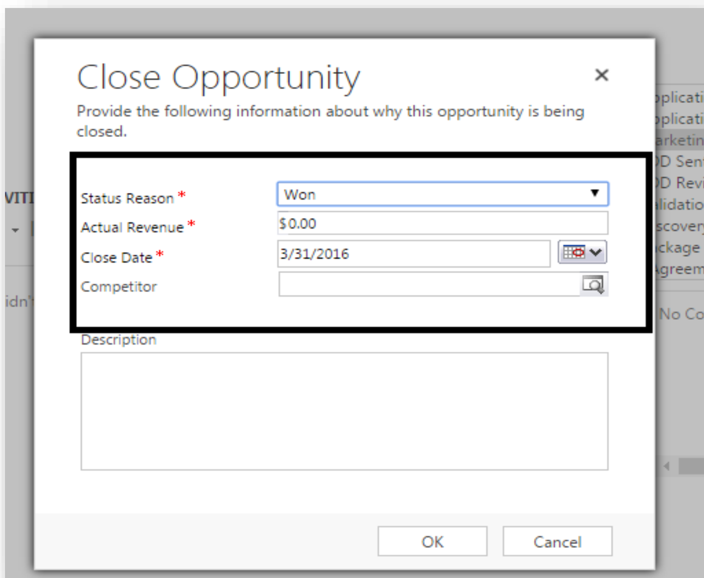
2. Click on **Finish** to place the lead on hold.

How to close an opportunity as Won

1. With the opportunity record open ensure that the Sales Stage is updated accordingly. This will be vital to ensure reliable data reporting on your Opportunities
2. From the upper left side of the opportunity page, select the option **Close as Won**:



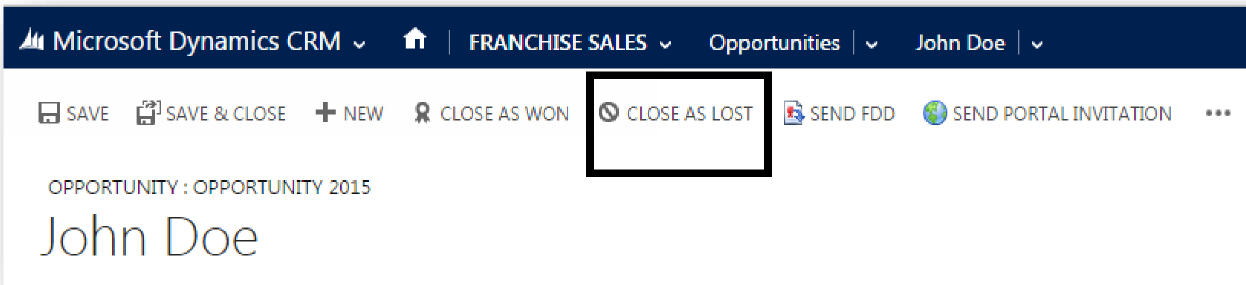
3. A dialog window will appear; update the necessary fields accordingly.



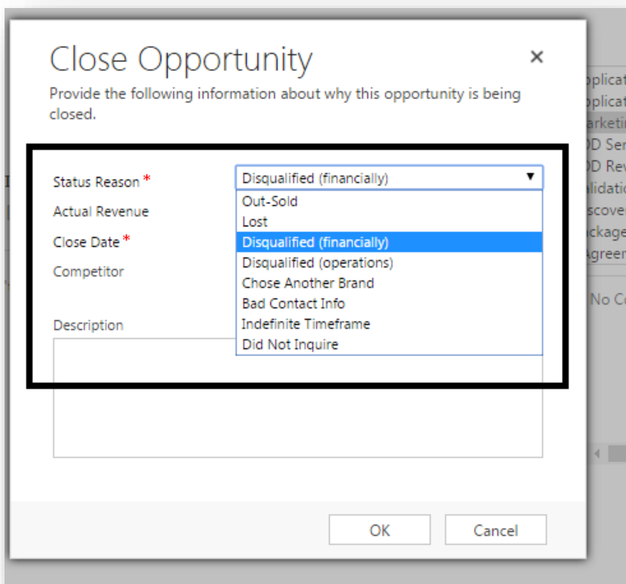
4. Click **OK** to save the changes and place the opportunity in "**Won**" status.

How to close an opportunity as Lost

1. From the upper left side of the opportunity page, select the option **Close as Lost**:



2. A dialog window will appear, update the necessary fields accordingly.



3. Click **OK** to save the changes and place the opportunity on **Lost.**

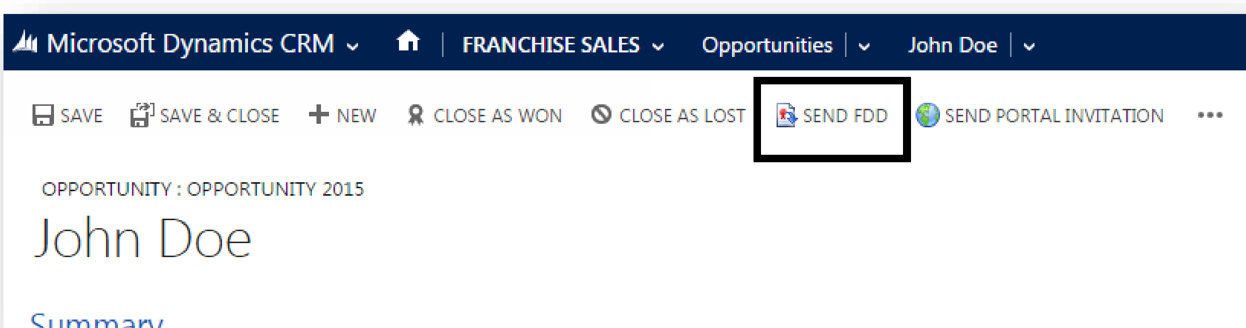
Sending an FDD

FDD (Franchise Disclosure Document): a legal document which is presented to prospective buyers of franchises in the pre-sale disclosure process. In FRM, this document is sent to both Contacts and Opportunities.

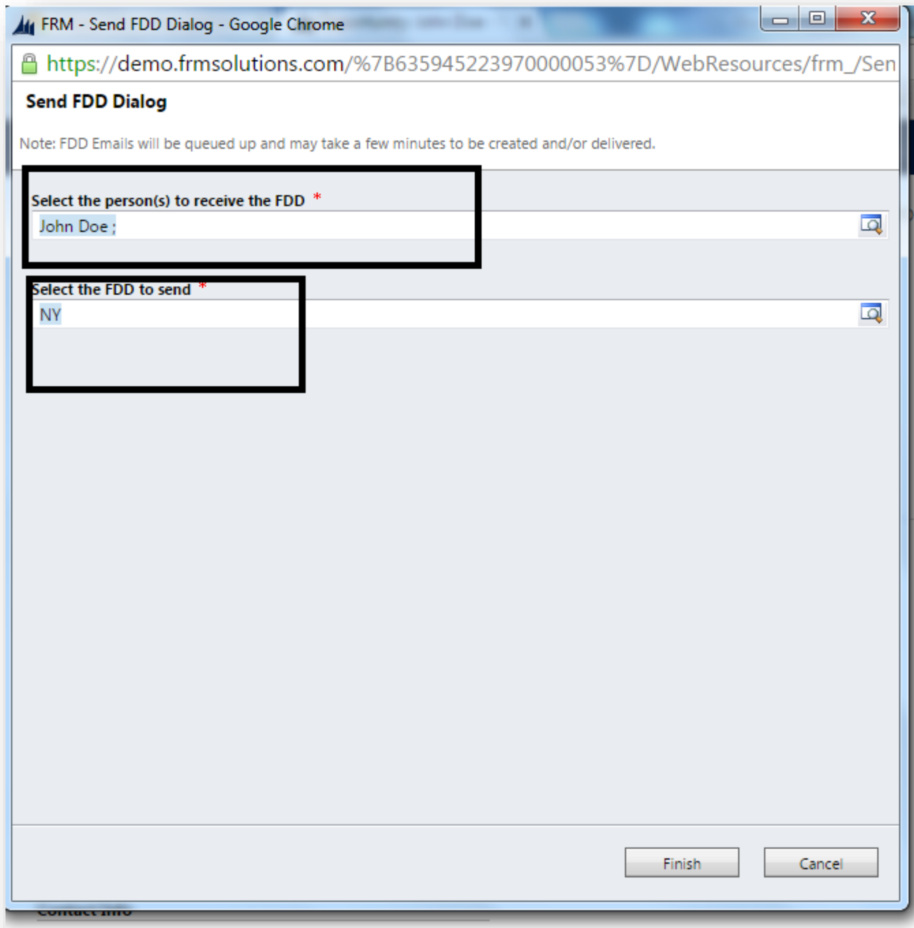
Sending an FDD via the Opportunity

1. Select the Opportunity via the Dashboard or FRM ribbon
2. The FDD is sent to the contact linked to the opportunity in question, you can identify the contact in the left side of the opportunity page:

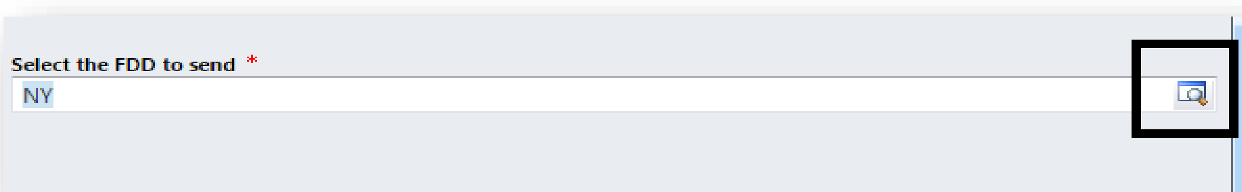
3. Click on the Send FDD option located in the upper left side of the page:



4. A dialog window will appear, here you will be able to see the name of the contact to whom the FDD will be sent and below that the version of template that will be sent. If you have multiple FDD's you will need to update this field accordingly.



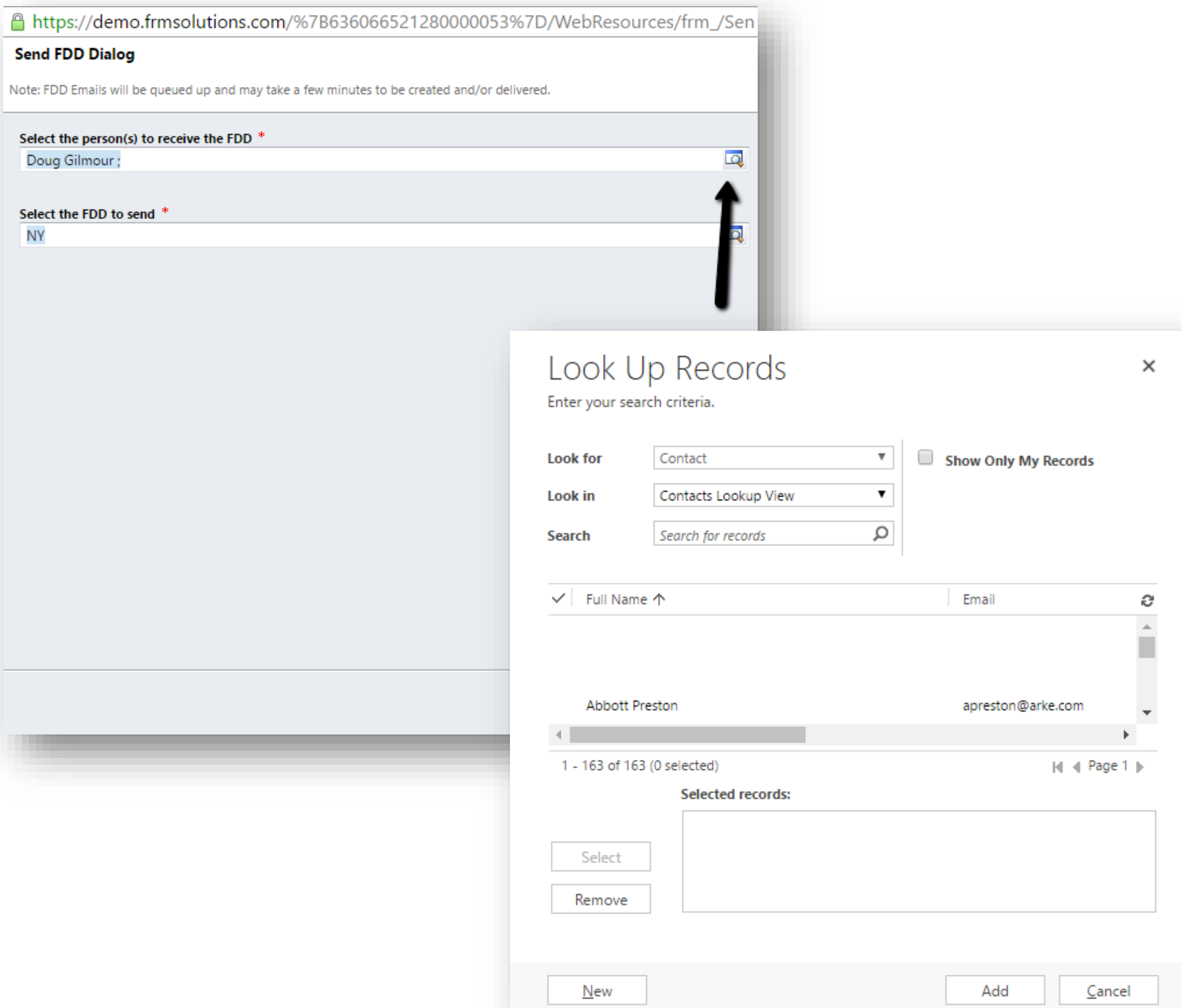
5. To change the FDD template you would like to send select the magnifying glass and choose the correct FDD from the dialog window that will appear:



6. Click **Finish** to finalize the operation and send the FDD to the contact.

Sending an FDD to Multiple parties

1. There may be cases in which you will want to send the FDD to an additional contact (e.g. business partners), besides the primary contact on the Opportunity.
2. If there are other parties requiring disclosure, select the look-up icon indicated below. This will open a dialog showing all Contacts within the system. Select all that need to be disclosed and click Add.
3. Click **Finish** to finalize the process and send the FDD to both contacts on the opportunity.

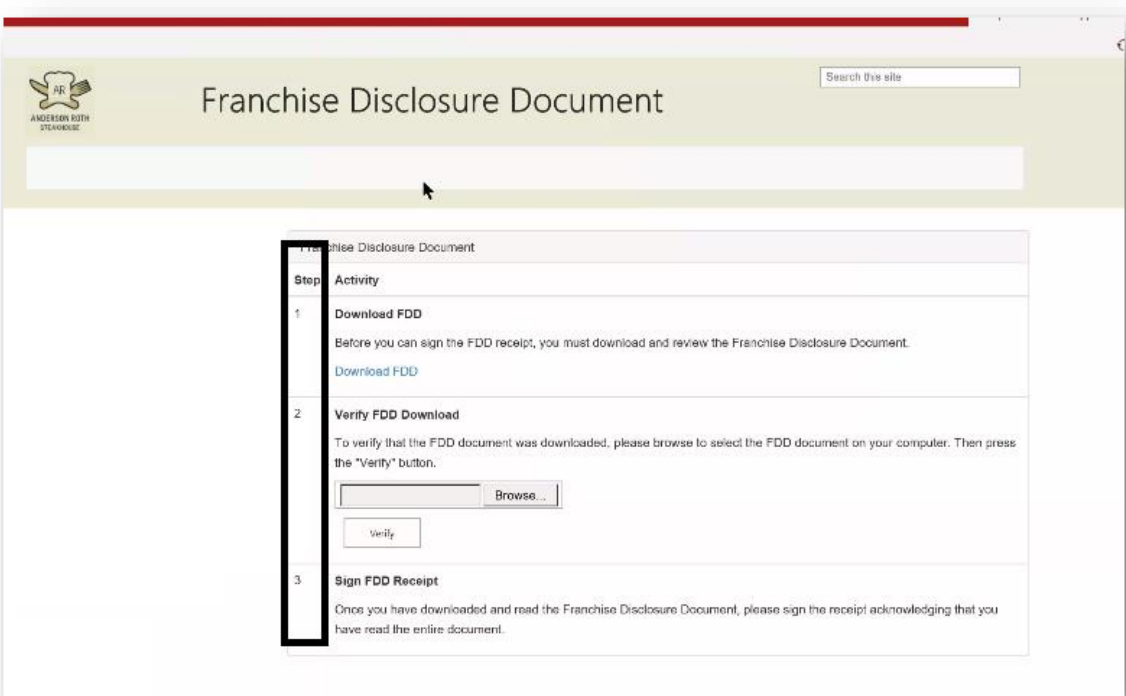


Publishing a New/Updated FDD

1. In order to publish a new FDD you will need to access the FRM support portal (http://support.frmsolutions.com/) and submit a case.
2. FRM Handles the creation and update of FDD's as a Basic (non-billable) support request.

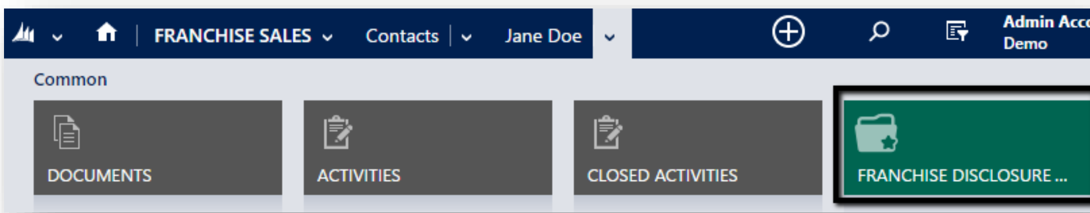
FDD Process – Candidate/Contact

1. Once an FDD is sent to the candidate, they will receive an email requesting review & digital signature
2. After clicking the Review and Sign hyperlink in the email they will be redirected to a SharePoint site for electronic signature.
3. There are 3 steps to follow to complete the process:
   3.1. **Download FDD** – it is critical that there is proof that the candidate received the document;
   3.2. **Verify FDD download** (this is to make sure that the document is indeed downloaded before getting signed) – here you will have to upload the downloaded document back into the site;
   3.3. **Sign FDD receipt** – here you need to electronically sign the FDD; you also have the option to insert the date of the signing.

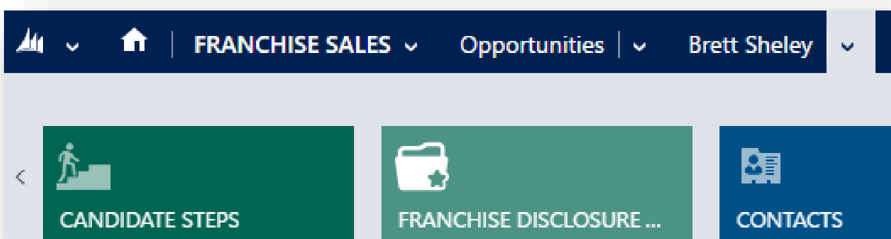


Reviewing Status' of Sent FDD's / Download Signed FDD

1. One can access FDD information from the contact the FDD was sent to or from the opportunity
2. With the contact open, select the drop-down next to the contact name to expose the ribbon. Select the Franchise Disclosure Agreements tile.



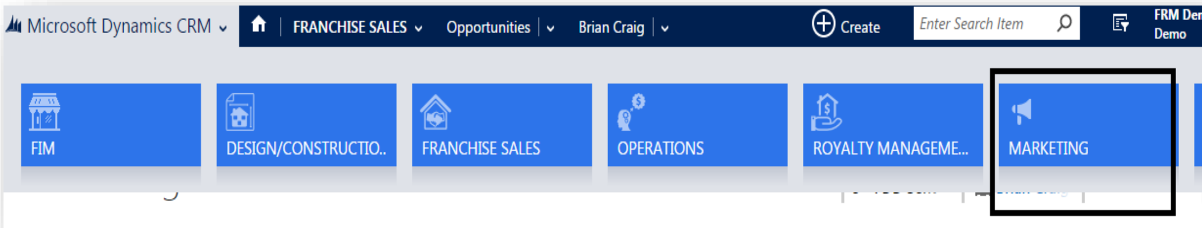
3. You can also verify the status of an FDD directly from an opportunity record; in the opportunity bar, select the drop-down next to the opportunity name and select Franchise Disclosure Documents.



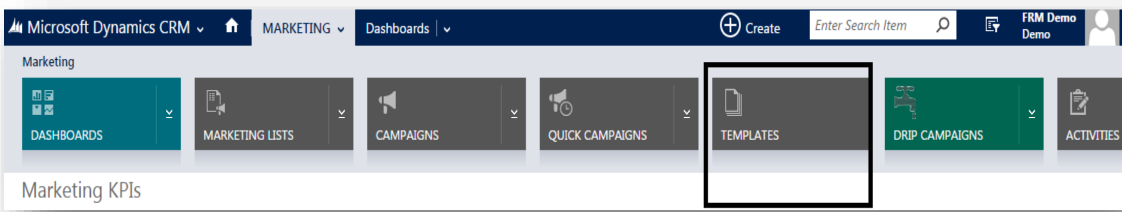
4. Under Franchise Disclosure Documents you can verify the status of the FDD's sent for the opportunity in question.
5. If you click and select the FDD, you will be able to access an audit trail of the activities on the FDD and a PDF file of the signed FDD.

Update Lead Auto-Reply Email

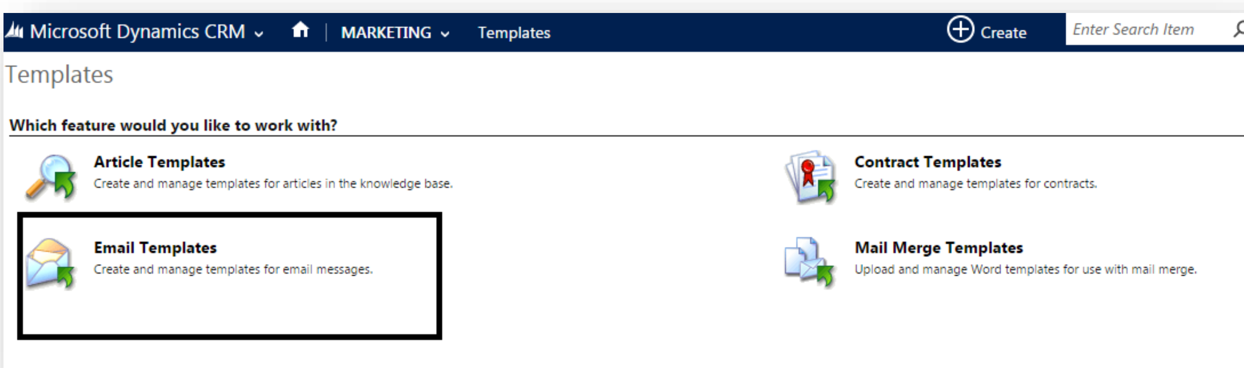
1. Using the ribbon navigate to the **Marketing** tile as indicated below:



1. Select **Templates**:

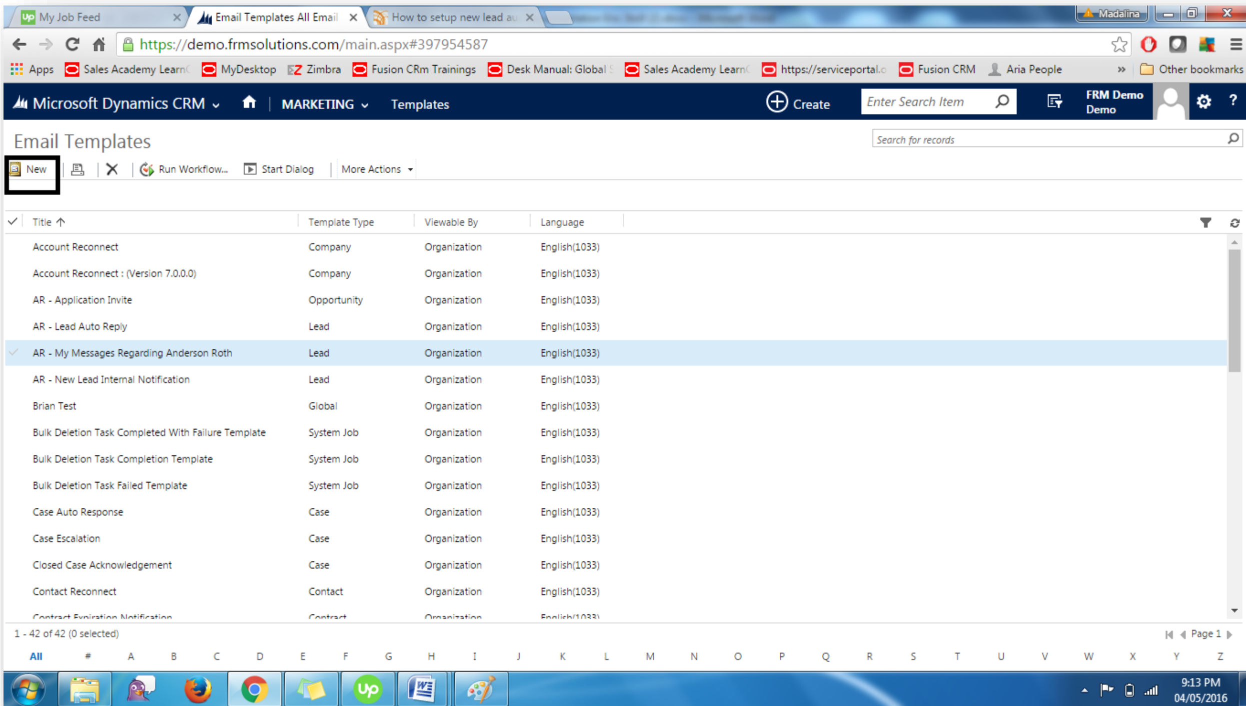


2. For the **Templates** option, select **Email Templates**:



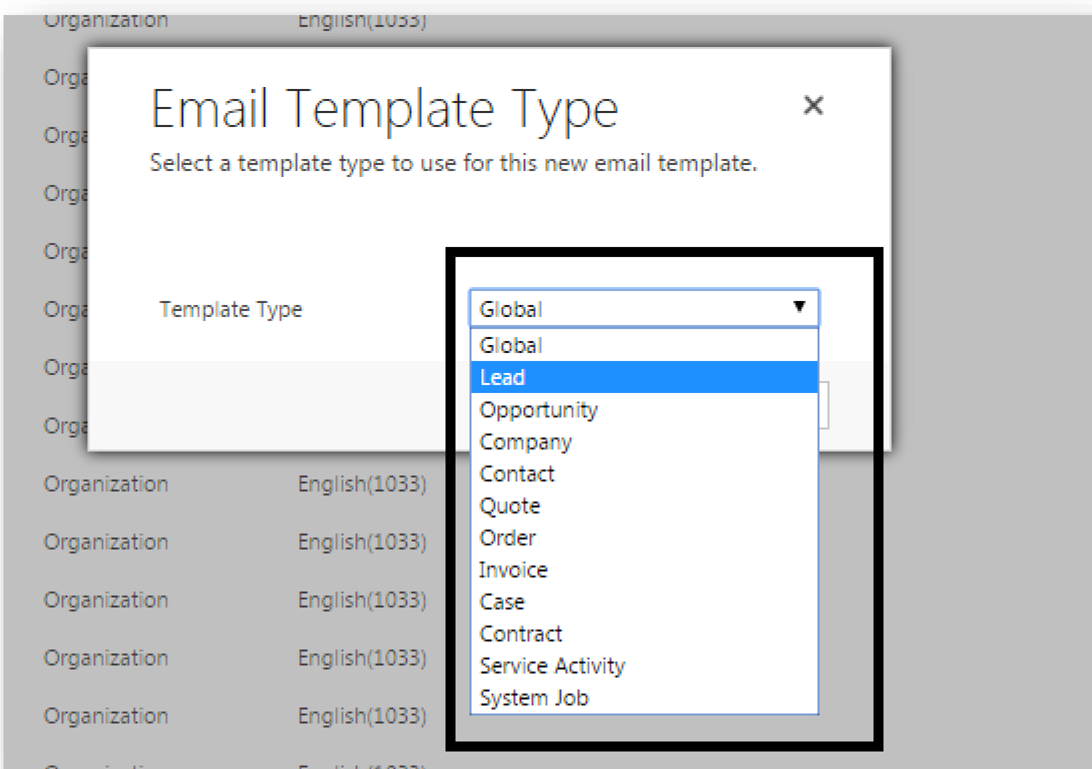
3. Here you can either choose to modify and customize the ***FRM – Lead Auto Reply*** existing template (located in the Email templates drop-down) or you can create a new template.

4. To create a new template, click on **New** icon under Email Templates:

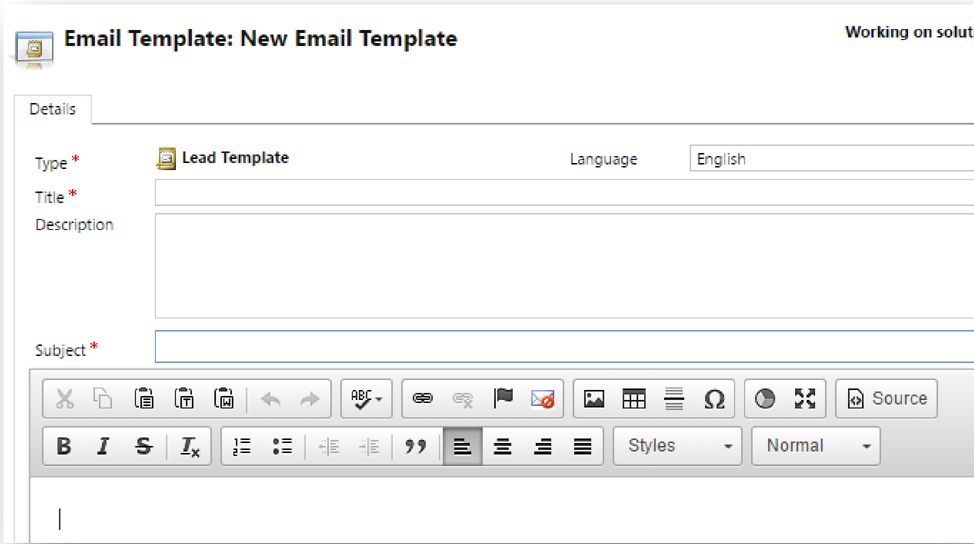


5. In the pop-up window, you need to select the **Template Type** from the drop-down.

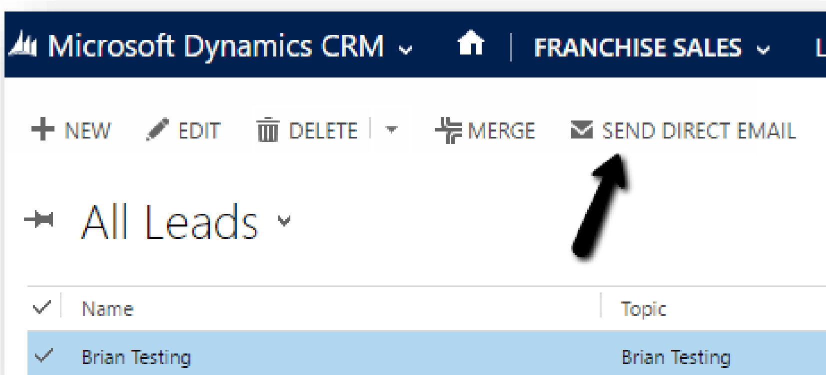
   Note: Within FRM you will have the option to conveniently auto-populate data from a record onto the email template when it is sent. For example, if you wanted to create an email template that would be sent to a large group of contacts and want to auto-populate their first names be sure to select the "Contact" template type from the drop-down.



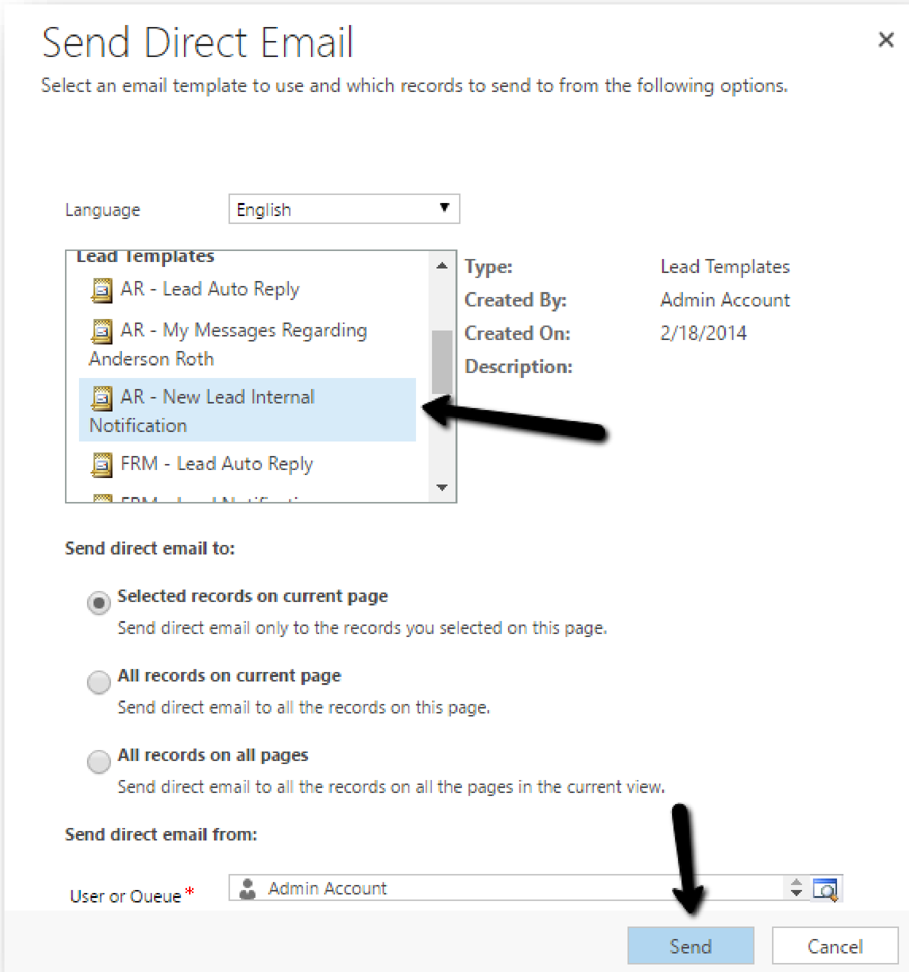
6. After entering all the necessary information (Title, Description, Subject and email body) select the option **Save and Close** to save your template. If you desire to work with the HTML directly, please hit the SOURCE button on the toolbar toggling your view from rich-text to HTML.



7. Save and Close your new email template. This template will be ready to use within the entity you selected when you chose your template type in step 5. You can access your template by selecting a record you wish to send an email to and hitting **Send Direct Email**.

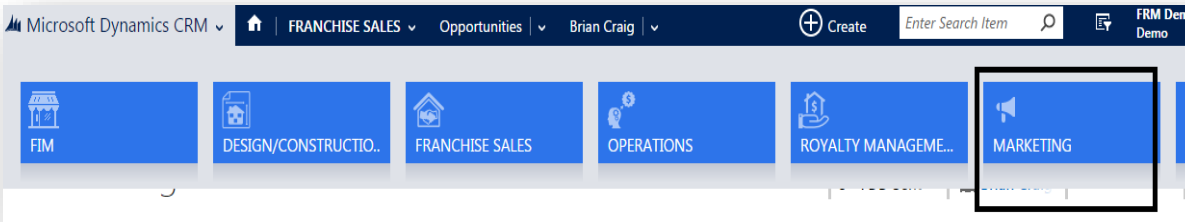


8. Select the template you created and hit Send

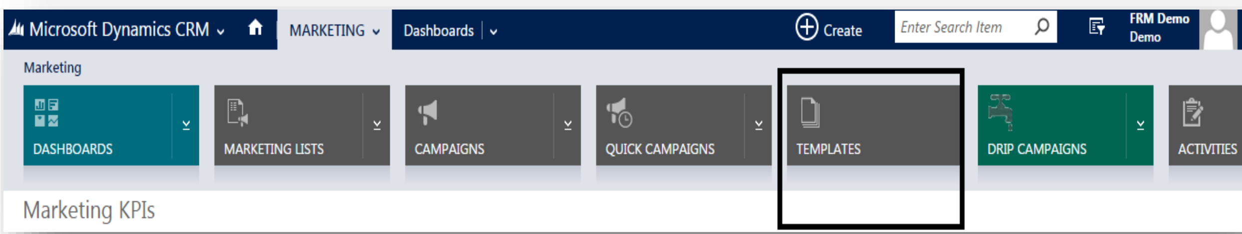


Configure/Update Candidate Portal Invitation Email

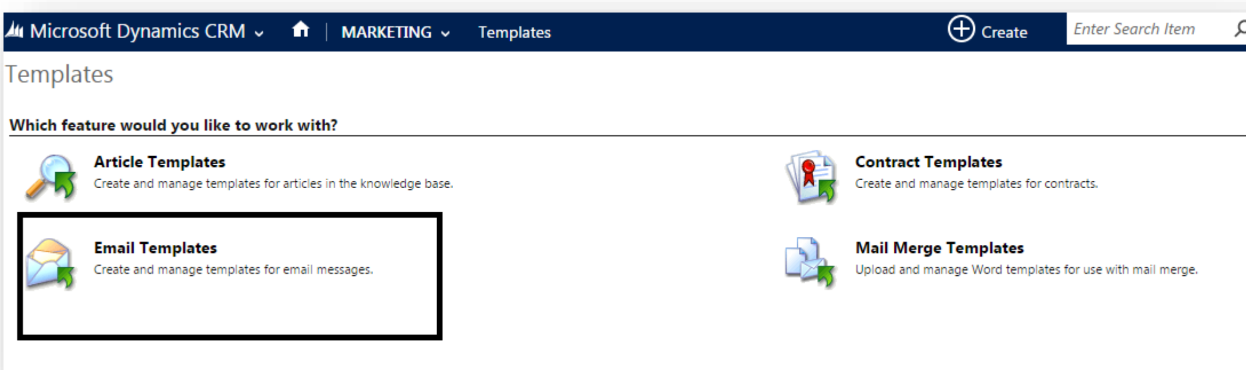
1. From the FRM ribbon select the **Marketing** tile:



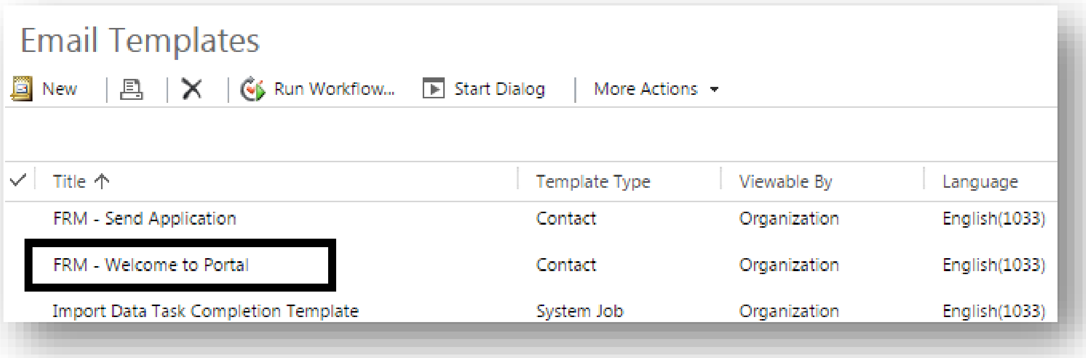
2. Select **Templates**:



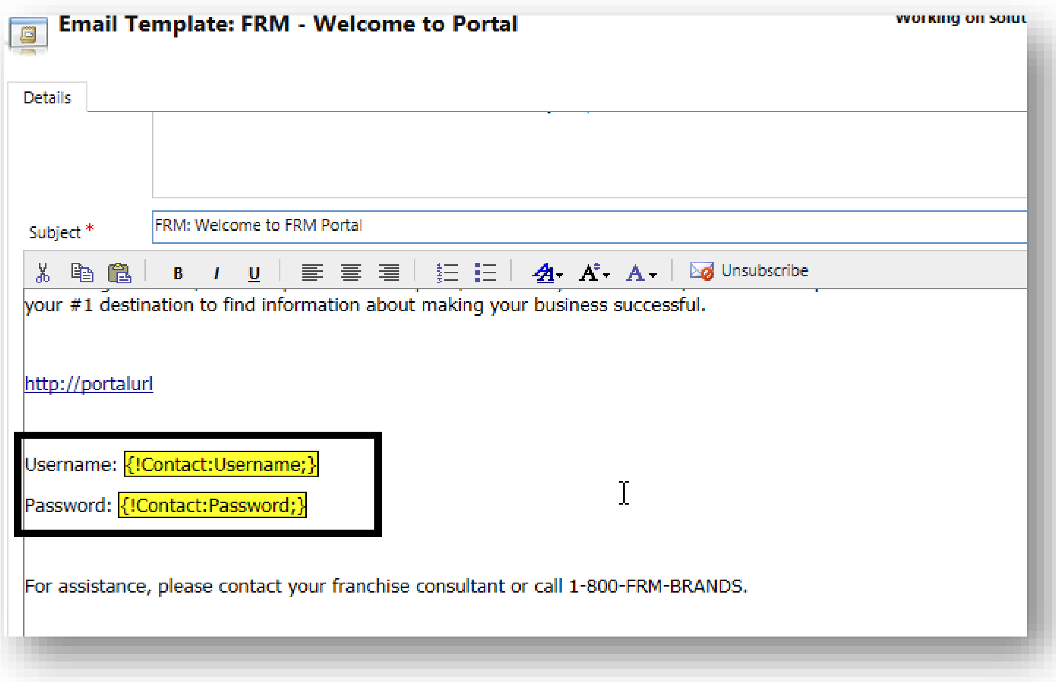
3. Select **Email Templates**:



4. From the available options of templates, you need to choose the template ***FRM – Welcome to Portal***:



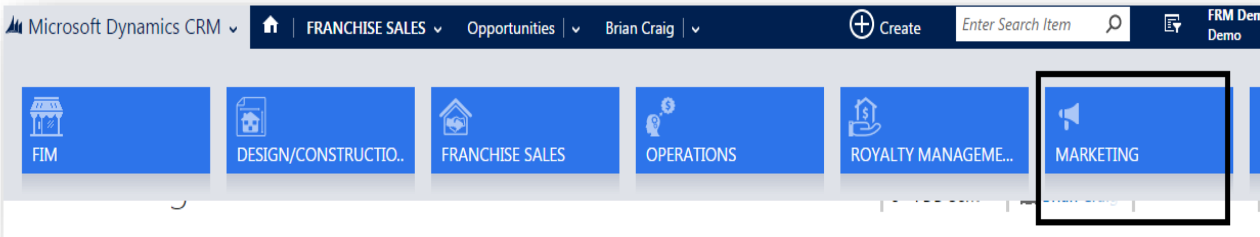
5. In the email template, you have the option to customize the information to adapt to your business needs (Title, Description, Subject and email body).
6. In the email body you will see that **the username and password** are highlighted in yellow; you don't have to make any changes to these fields, as they will be automatically populated with your details.



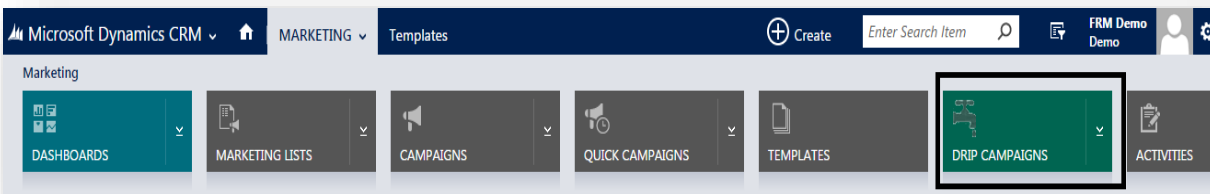
7. After inserting all the necessary information select the option **Save and Close** to save your template.

Configure Drip Campaign

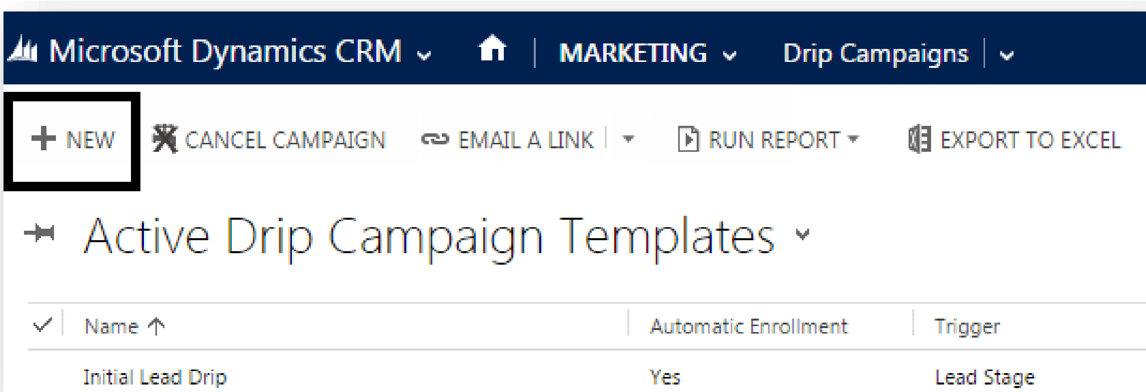
1. From the FRM ribbon select the **Marketing** tile:



2. From the Marketing drop-down, select the icon **Drip Campaigns**:



3. In order to create a campaign, you need to go to the upper left side of the page and click on **New** icon:

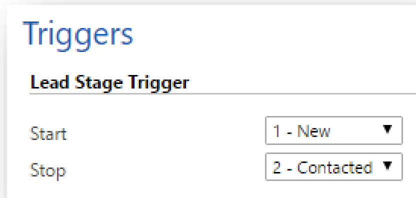


4. Enter a name for your new drip campaign

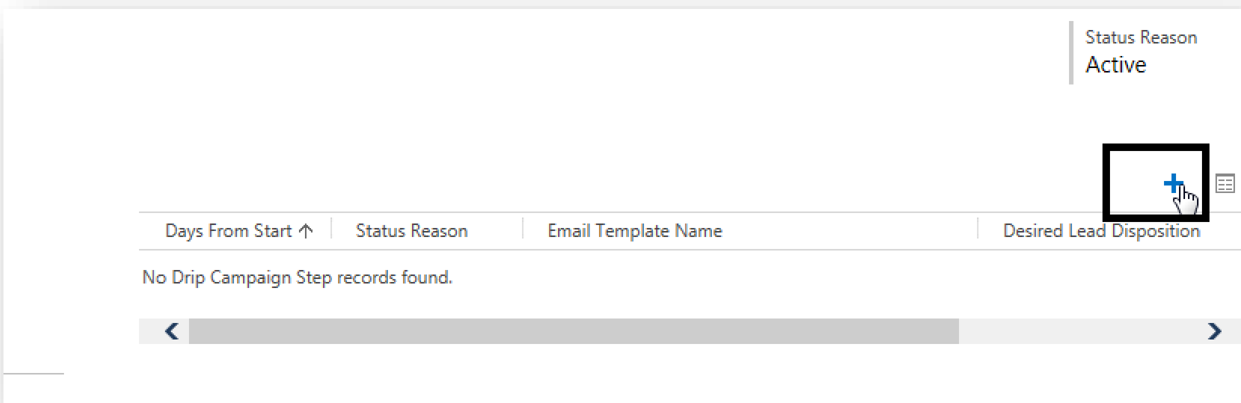
- If the drip campaign will be reused, please select the “yes” within the **Is Template** field
- If you would like this drip-campaign to be sent and stopped via certain triggers (i.e. when a new lead arrives in the system) select “yes” within the **Automatic Enrollment** field.
- If you possess multiple brands you may create brand-specific drip-campaigns that will only apply to leads tagged with that brand. If this does not apply to your business, leave this field blank.

5. Next you will be required to select the triggers for this drip-campaign; In this example we will use **Lead Stage** as our trigger.

6. After selecting your trigger, you will see **Stop** and **Start** clauses appear. This will include all of your lead stages and you must assign them. In this example, we will select the **1 – New** status to start the drip-campaign and once the rep has successfully made contact with the lead changing the status to **Contacted** will stop the campaign.

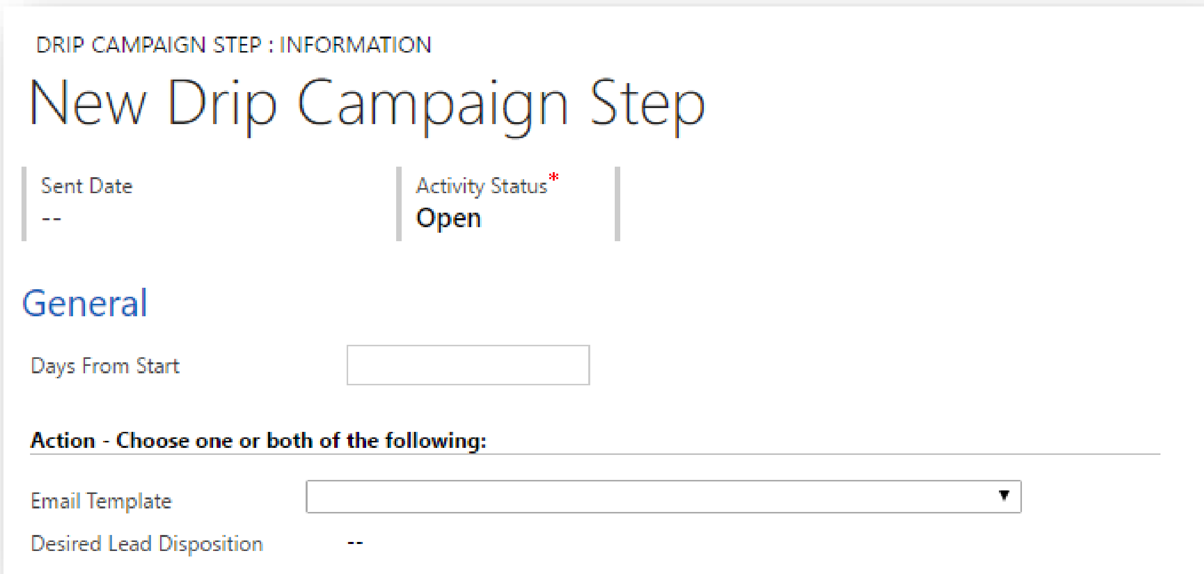


7. **Save** your changes
8. The next step is to add the messages you want for this drip campaign; in order to do so, go to the right side of the page and click on the **+** icon right below the status of the campaign:

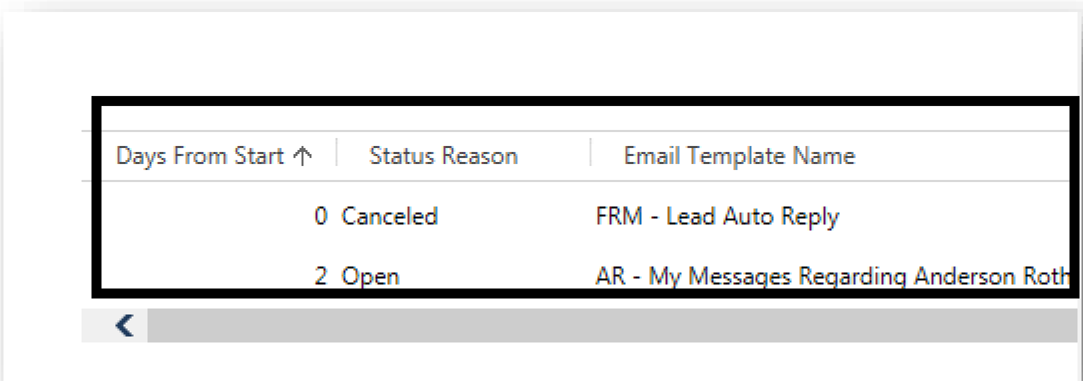


9. In the pop-up window, you will need to customize the details for your drip campaign accordingly;

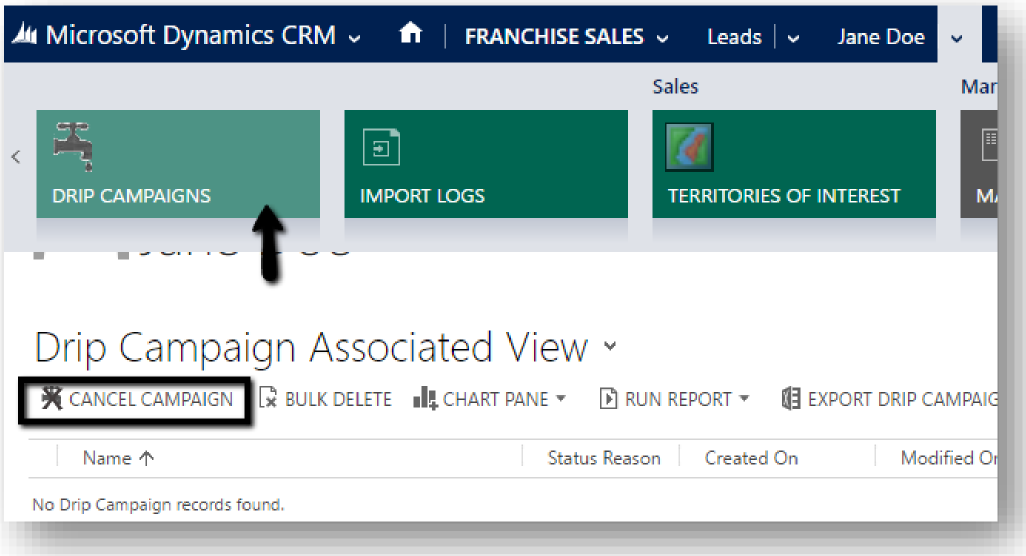
10. The **Days from Start** section is to be populated with the number of days from the time the drip-campaign began until the message should be sent



11. Next you will have to select the Email Template from the drop-down
12. There is an option to add a **Desired Lead Disposition**, if you wish to update the lead disposition after a specific email is sent.
13. Click the **Save & Close** option to save your changes;
14. You will be able to identify your drip campaign messages on the right side of the page, for monitoring purposes: **Days from Start, Status Reason and Email Template Name.**



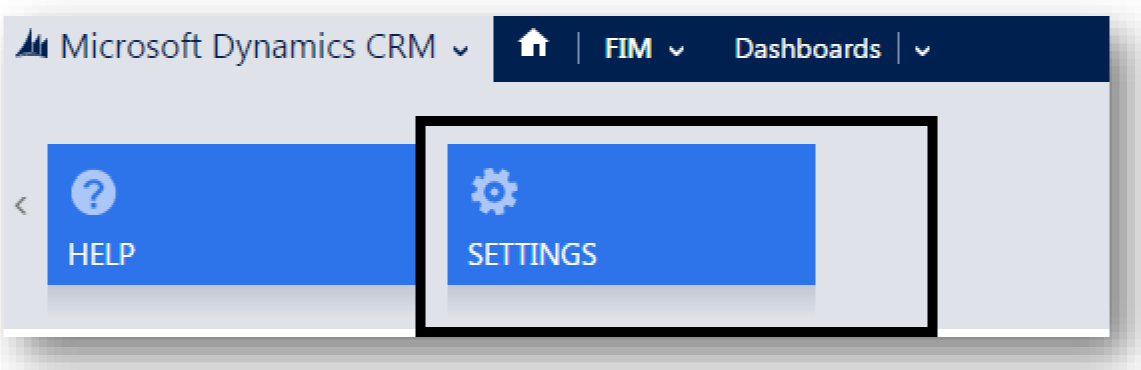
15. If you are ever curious where a lead is in their drip-campaign you can view this via their **Activities Feed** or by selecting the drop-down next to their name in the ribbon and selecting the **Drip Campaign** field. It is from here one can cancel an in progress drip-campaign if they wished.



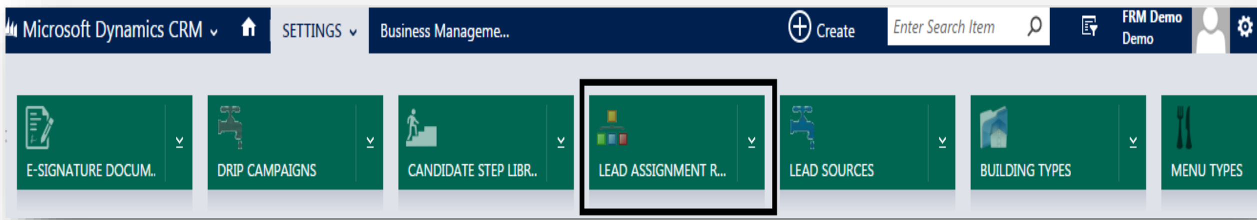
Configure Lead Reassignment

Lead Reassignment is the process of assigning new leads entering the system to your sales representatives. Please follow the below steps in order to update or create **lead reassignment** rules.

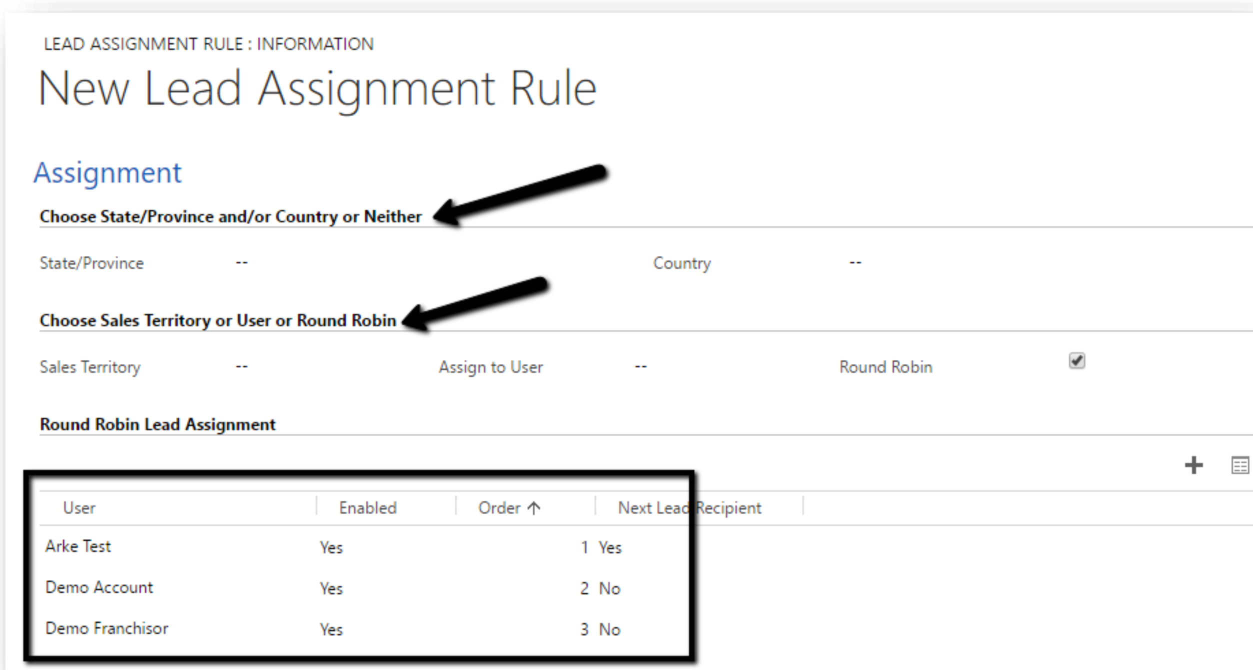
1. Within the FRM ribbon, select **Microsoft Dynamics CRM** and from the drop-down select the **Settings** icon:



2. From the Settings drop-down, select **Lead Assignment Rules** icon:

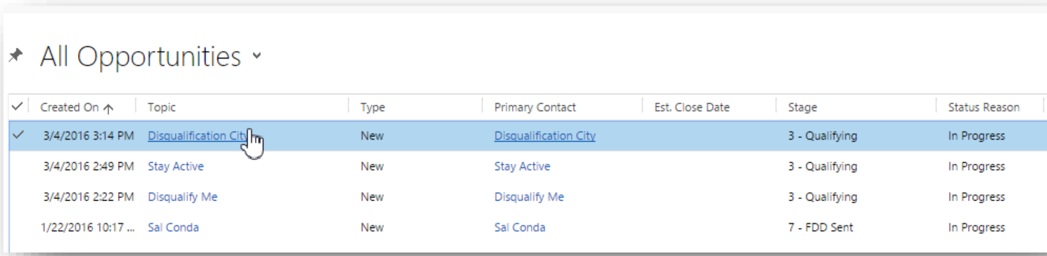


3. There are 3 options for lead reassignment:
   3.1. Assign to **Sales Territory** or **State**- select the Territory or State from the drop-down and assign the sales rep. When a new lead arrives tagged with that city or state they will be automatically assigned to the sales rep. you provided.
   3.2. **Round Robin** option - based on a list of provided users that participate in the Round Robin, each of the individuals involved will take turns in receiving leads. To manage the list for the Round Robin routing, click on **Round Robin Lead Assignment** and in the pop-up window you can change the order of the sales reps involved; **Save & Close** the changes made.

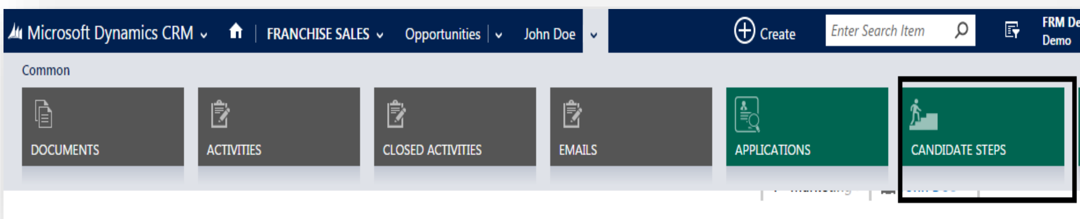


Lock & Unlock Candidate Portal Content

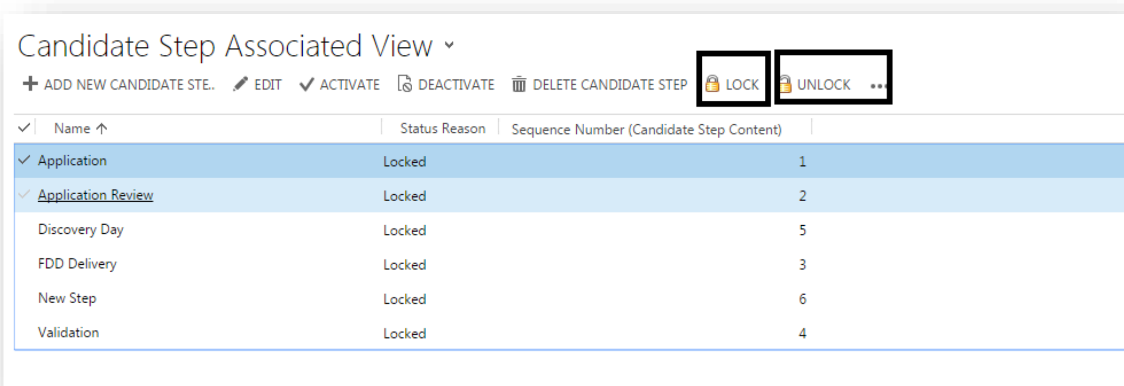
1. Select & open the opportunity



2. With the opportunity select Candidate Steps from the ribbon underneath the open Opportunity



3. Select the step or steps you would like to update and hit the lock or unlock buttons indicated below:

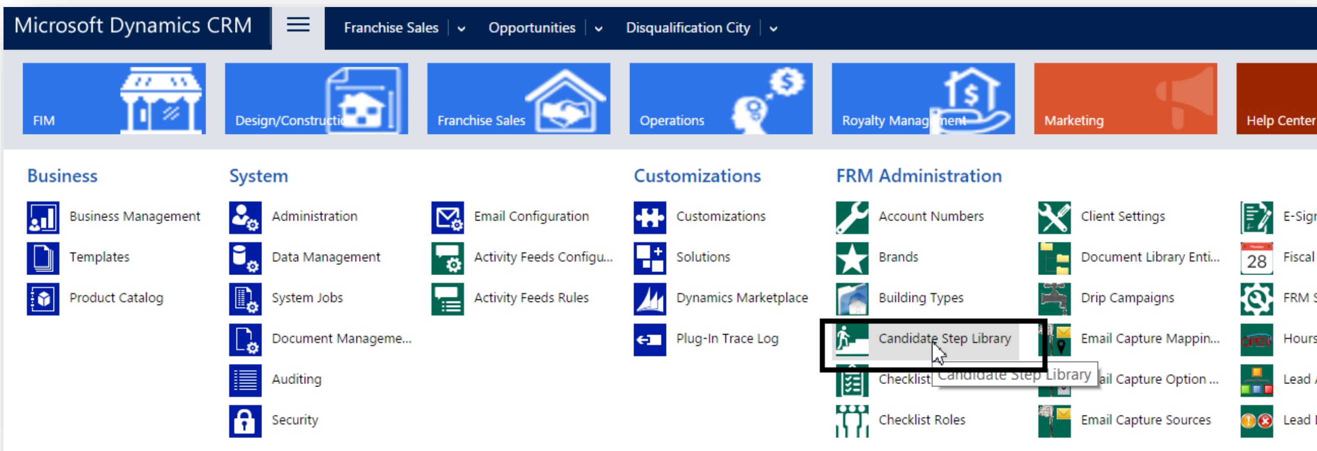


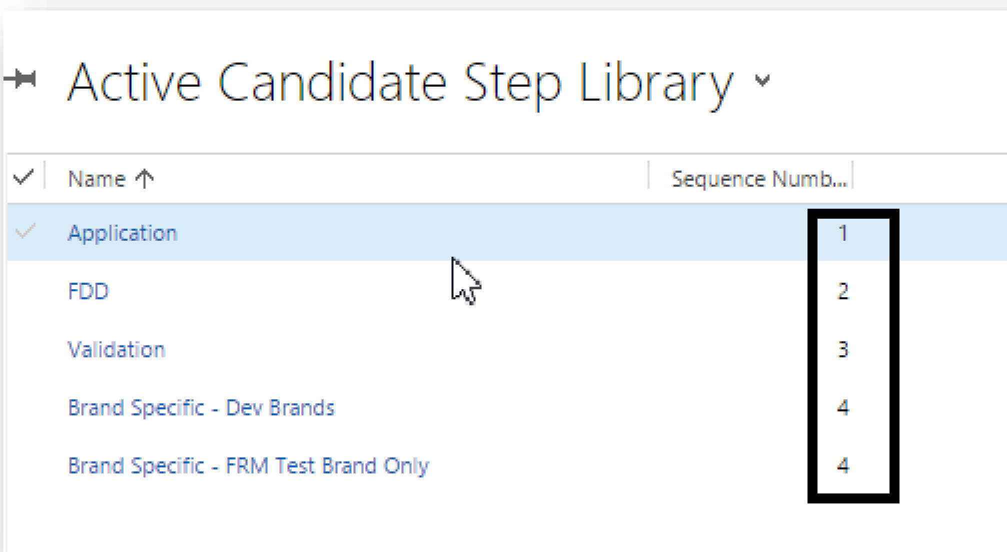
Regardless of what Sales Stage the opportunity is in, you can manually unlock multiple or all sequence numbers.

Automatically Unlock Candidate Portal Content by Sales Stage

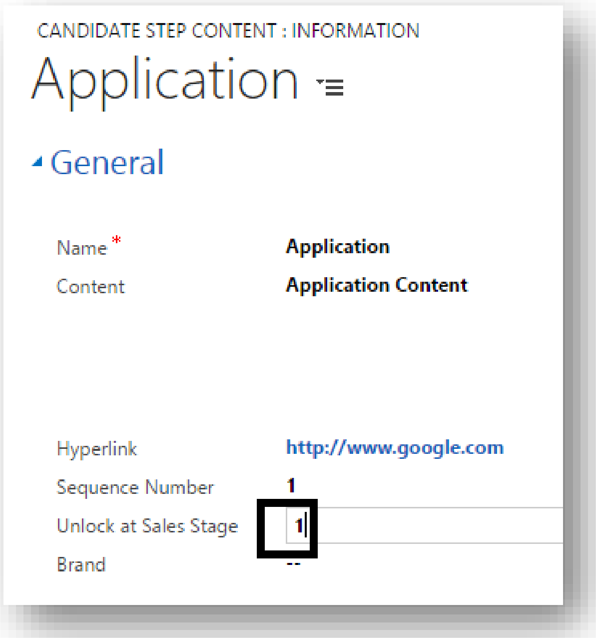
Unlocking a certain Candidate Portal step can also be done automatically, by synchronizing the corresponding step with your Sales Stages.

1. From the Settings menu, select the icon **Candidate Step Library**. Here you will see all steps with their corresponding **Sequence Numbers**:

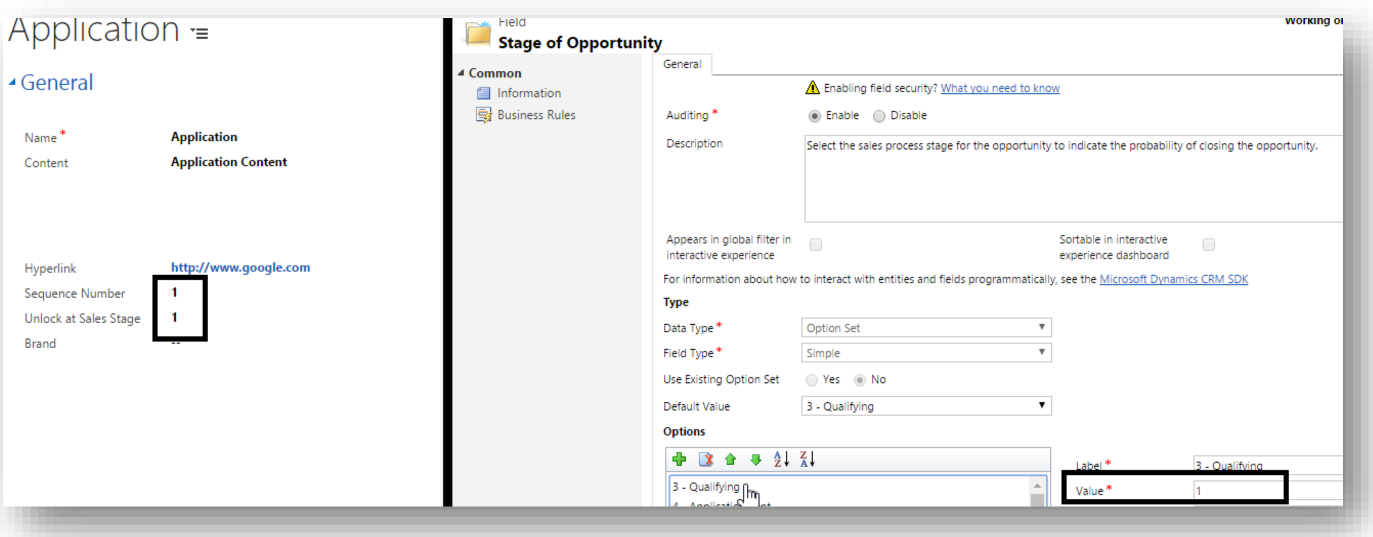




2. Each of these above steps has a value that will help you synchronize the Sales Stage with the opportunity. That value is a number that is auto-assigned within the Sales Stage field. You must know what the values are of this option set before you set up or change your sales stages. If that stage is met, the candidate step and all steps before that will be unlocked automatically.



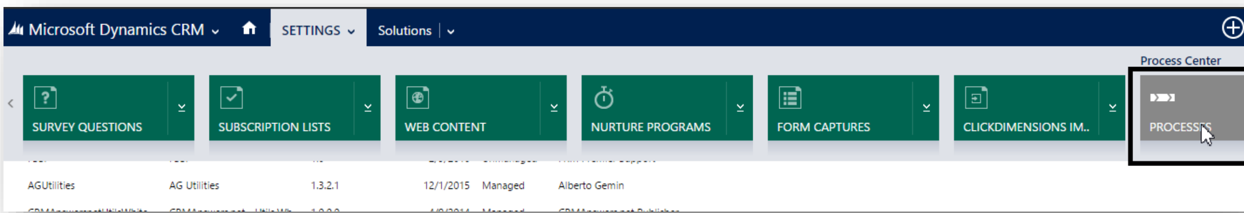
3. You can verify the opportunity Sales Stage information at what value the candidate step will be unlocked and compare the values.



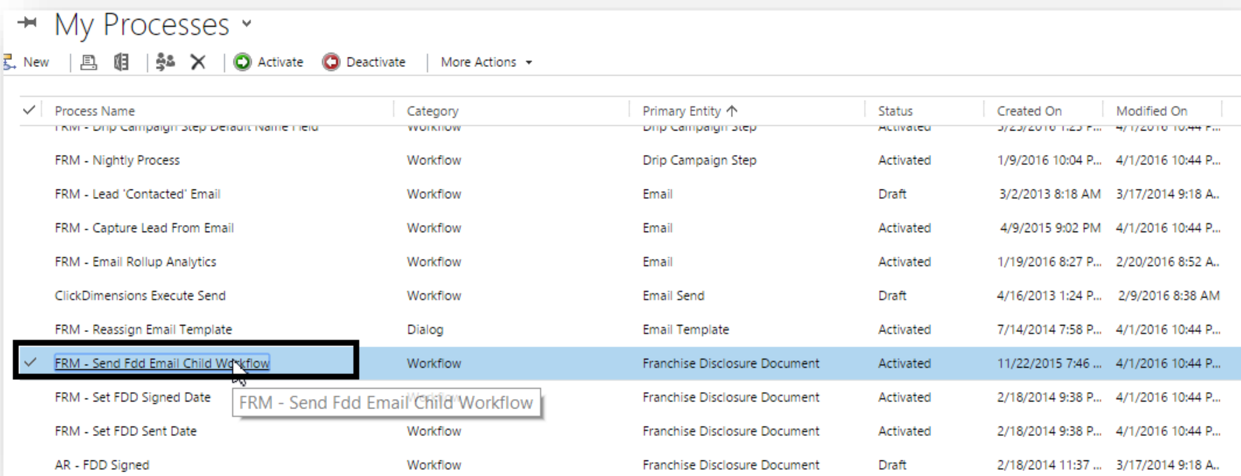
Edit FDD Email Template

In order to modify the message that is released to a prospect when you send them an FDD you must modify the workflow responsible for sending the FDD.

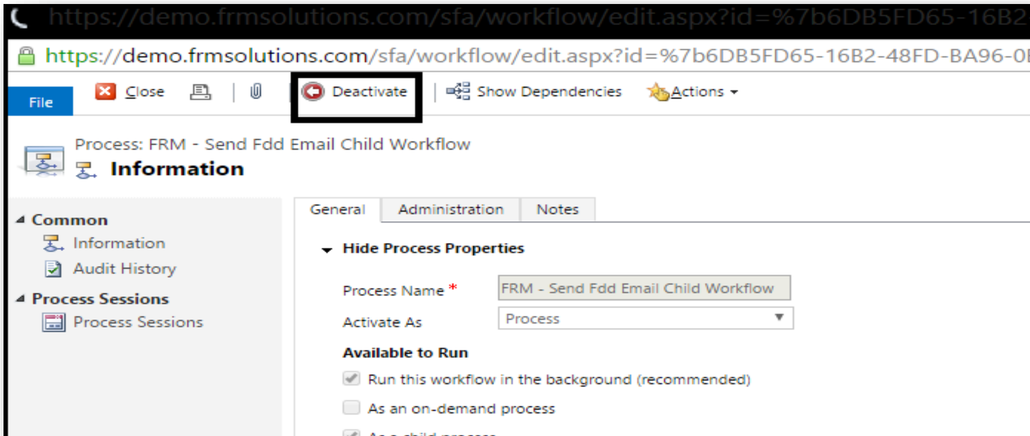
1. From the Settings menu, select the icon Processes



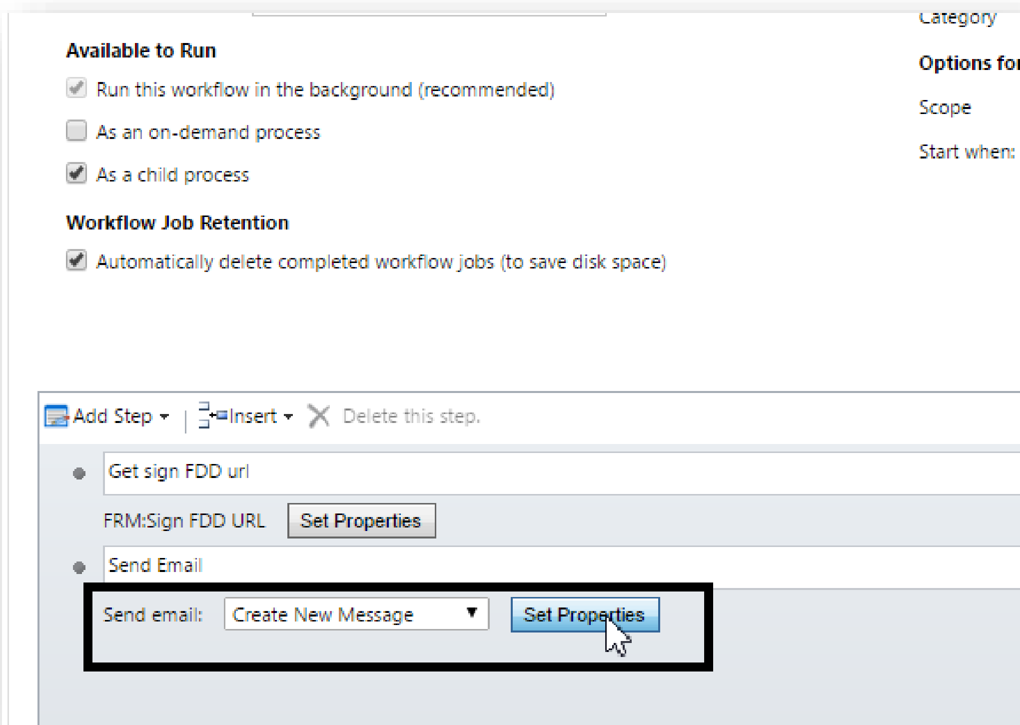
2. Select the **FRM – Send FDD Email Child Workflow**



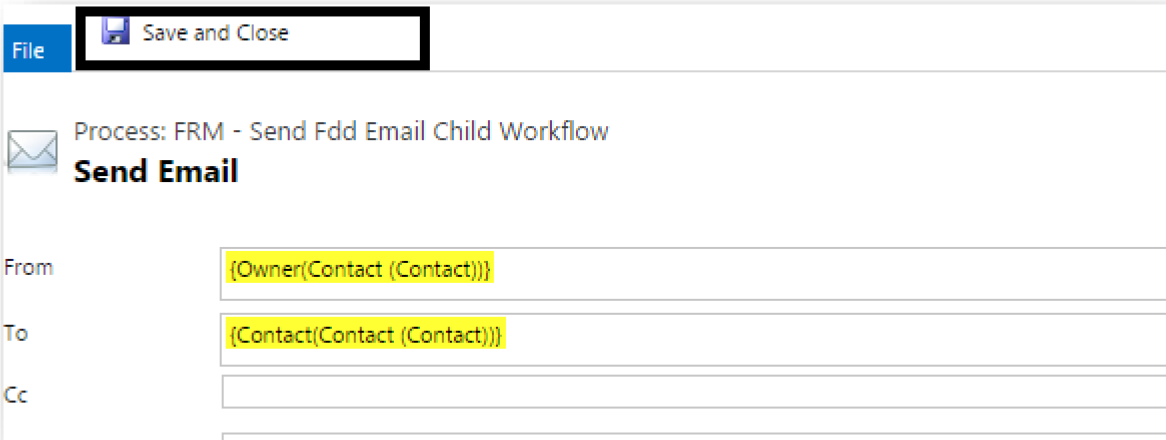
3. Before you can make changes to any workflow, you must **deactivate** it. Please note that this change will affect all users of the system so when deactivating a critical to business workflow it is best to inform all users of the system or to execute in off-hours.



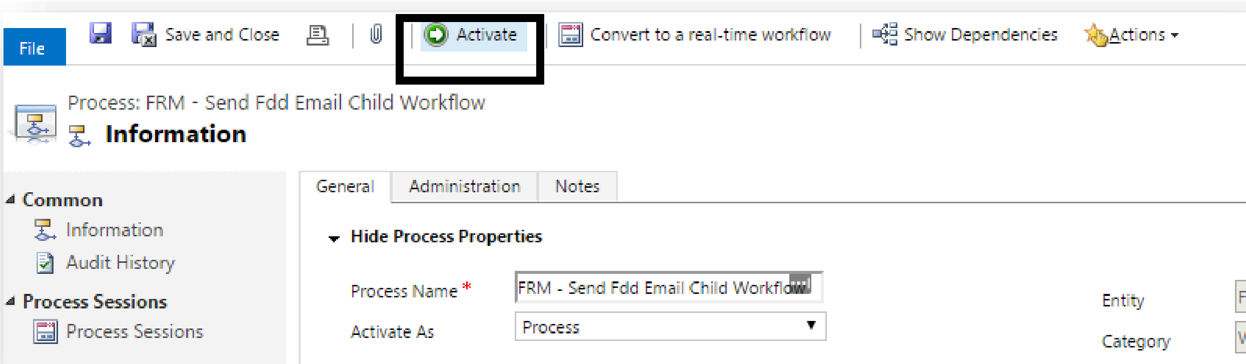
4. With the workflow deactivate select the **Set Properties** button from the field **Send email** step



5. A window will appear containing the content for the FDD email that is released to the prospect.
6. For more information on updating email templates please see the Global CRM Topics user guide here.
7. When you complete editing the email body and details as per your needs, click the **Save and close** option in the upper left side of the page to save your changes.



8. Next, you must save the workflow and reactivate it by hitting the option **Activate**; this will reinstate the process of FDDs being sent.



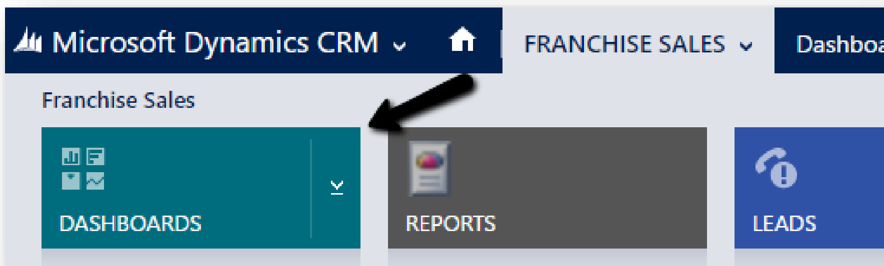
Candidate Portal Analytics

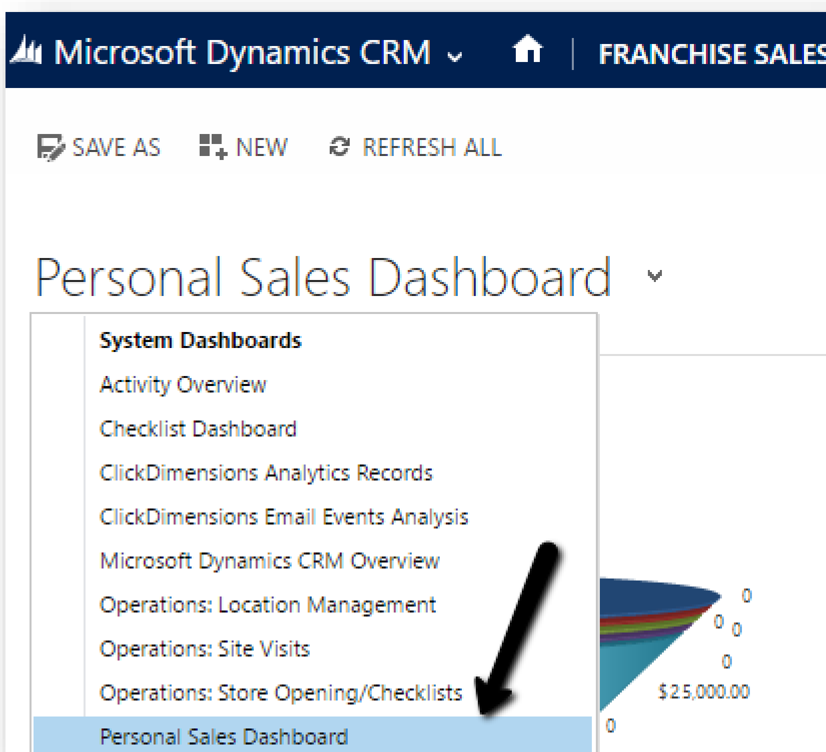
As a prospect is moving through your sales pipeline and navigating the candidate portal their page views and logins will be tracked and stored within FRM providing the franchisor better visibility into what actions they are taking and how they are responding to the process.

There are multiple ways one can access this information. They may do so from the Personal Sales Dashboard, from the Opportunity or from the Activities entity within FRM. We will outline each of those below.

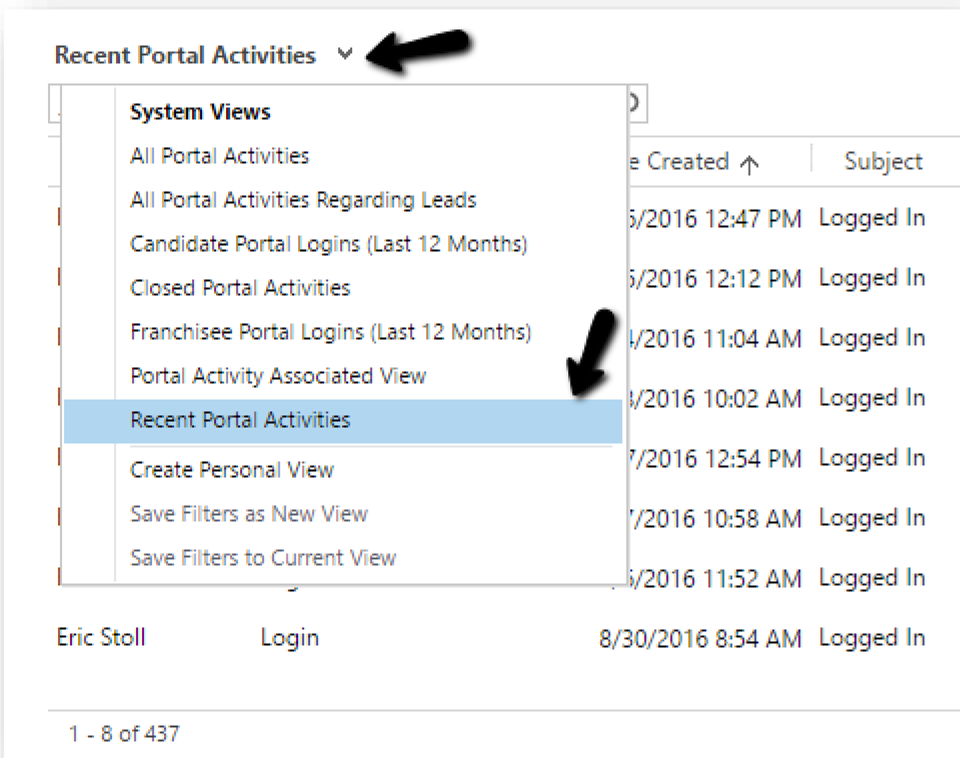
Accessing Candidate Portal analytics data via the Personal Sales Dashboard

1. From within FRM select Dashboards > Personal Sales Dashboard



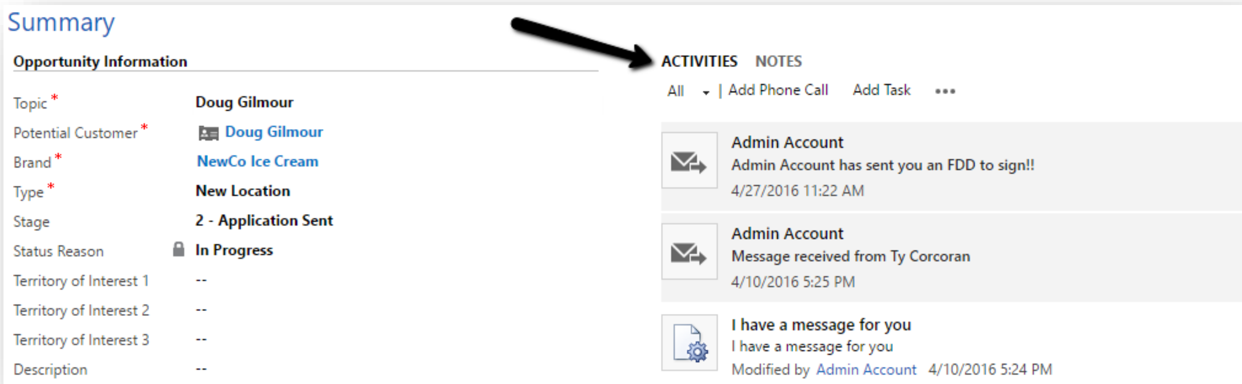


2. With this Dashboard open on your screen you will notice at the bottom there is a section dedicated to portal activities. This section is defaulted to a view of “Recent Portal Activities” but you may change that by selecting the drop-down.



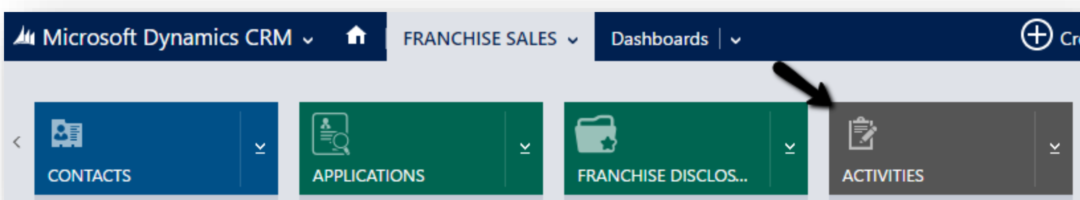
Accessing Candidate Portal analytics data via the Opportunity

1. Open the prospect's opportunity that you would like to review.
2. Candidate portal activities will be present within that Opportunity's activity pane

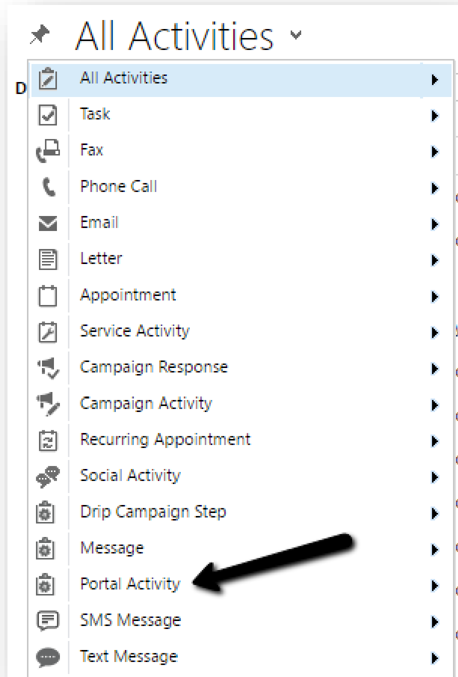


Accessing Candidate Portal analytics via Activities Entity

1. Select the Activities entity from the ribbon

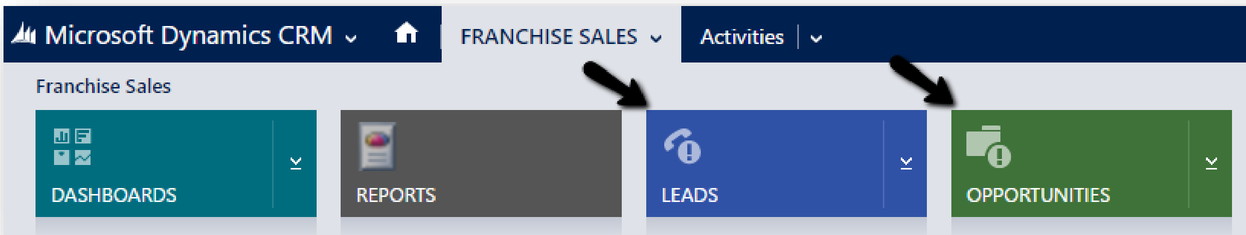


2. Change the view from All Activities to Portal Activities

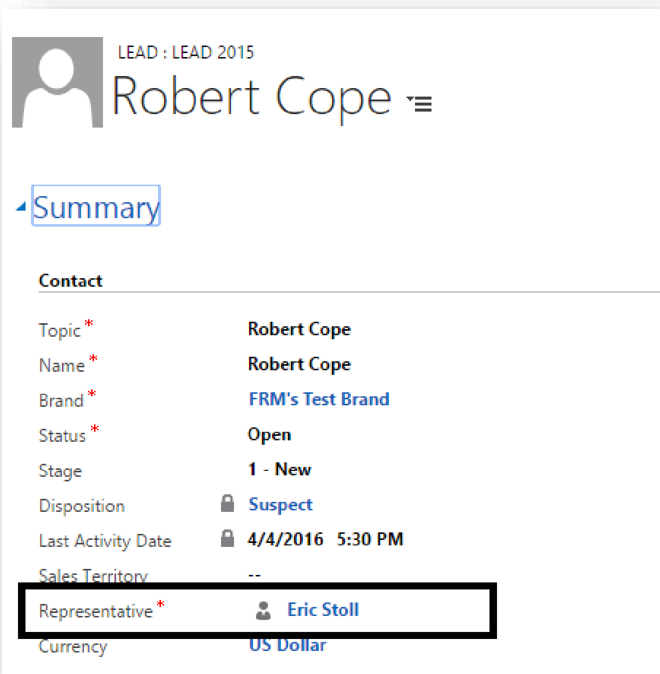


Assign Lead/Opportunity to another User

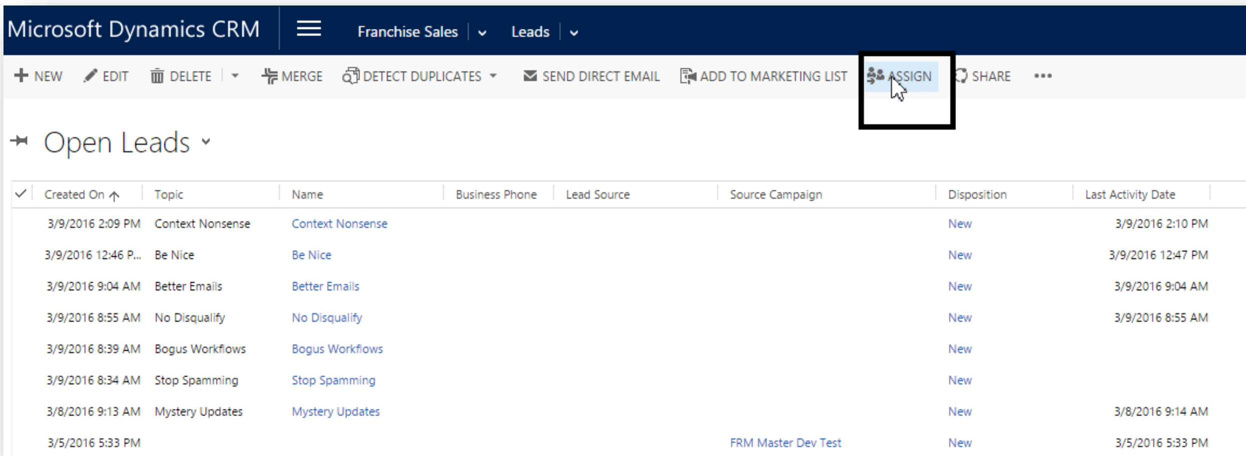
1. Select either the Lead or Opportunity from the ribbon



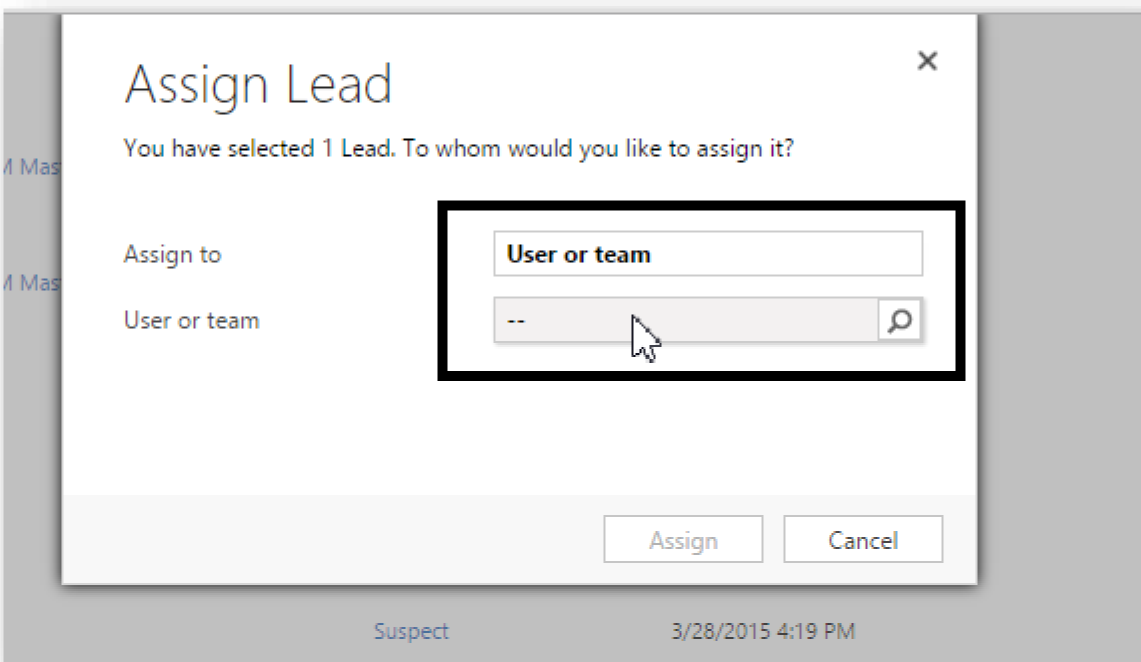
2. If you need to verify who is the current rep assigned to the lead, enter the lead and check under **Representative** for the name:



3. From the Open Leads view, select the lead/s or opportunities you would like to re-assign and click “assign” in the ribbon. Please note, one can only assign leads or opportunities they are currently the owner of. Being an administrator in the system is an exception to this rule.



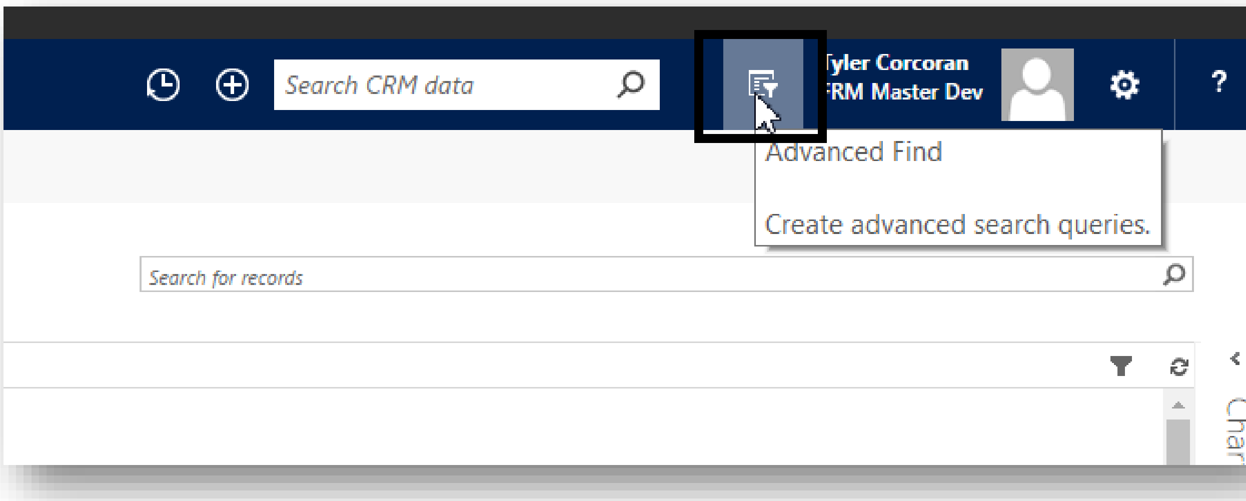
4. In the pop-up window, select Assign to: **User or team** and search for the name of the rep that is to be assigned on this lead.



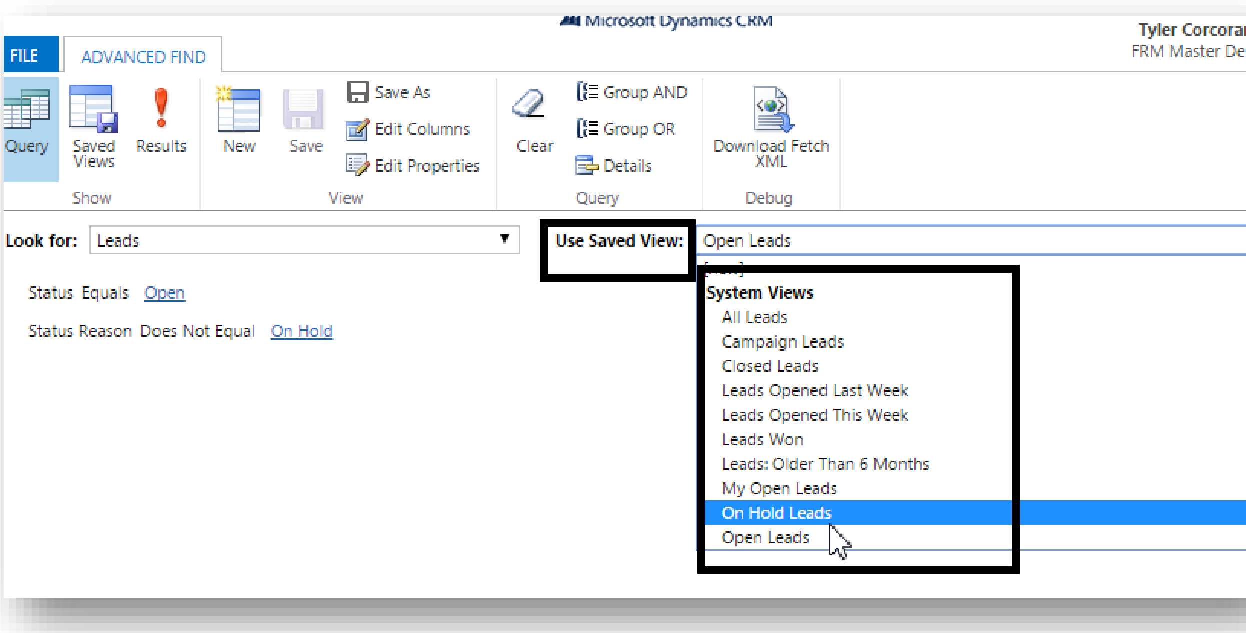
5. Click on **Assign** option to save the change.

Using Advanced Find to query Leads / Opportunities and reassign based on criteria

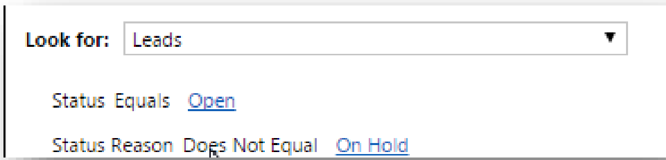
1. In the upper right side of the page, click on the **Advanced Find** icon:



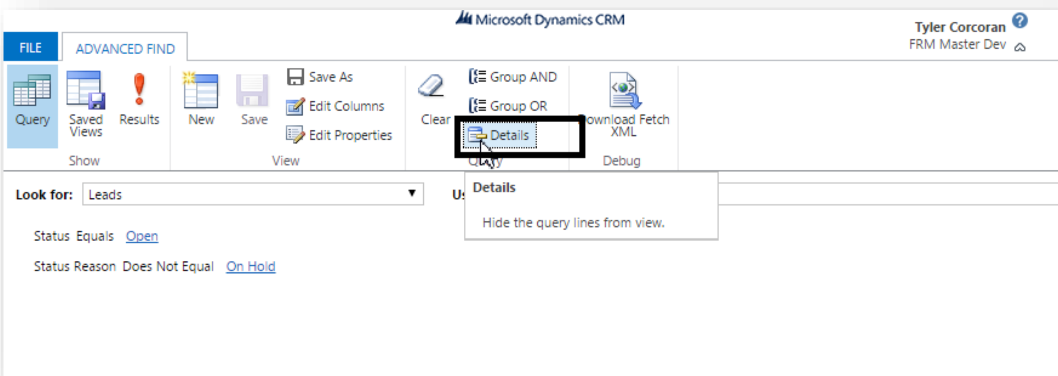
2. **Advanced Finds** will begin with the view of the page you are on, but you have the option to modify this from the drop-down list with system views.

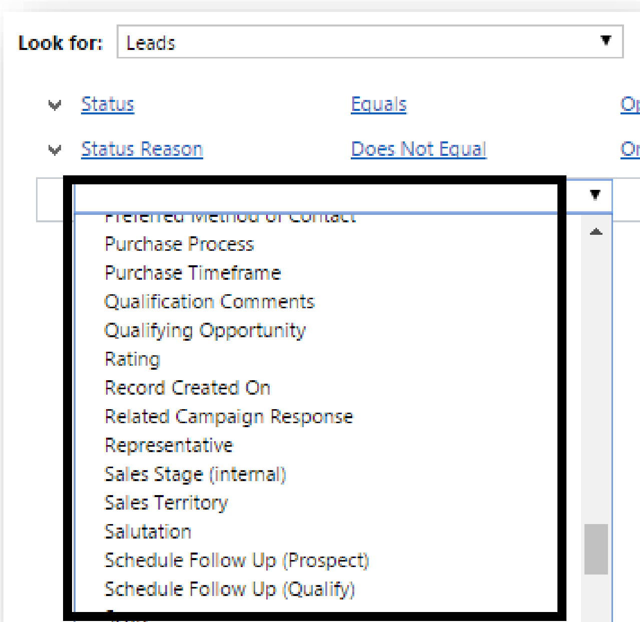


3. You will notice there are some predefined search criteria already in place:

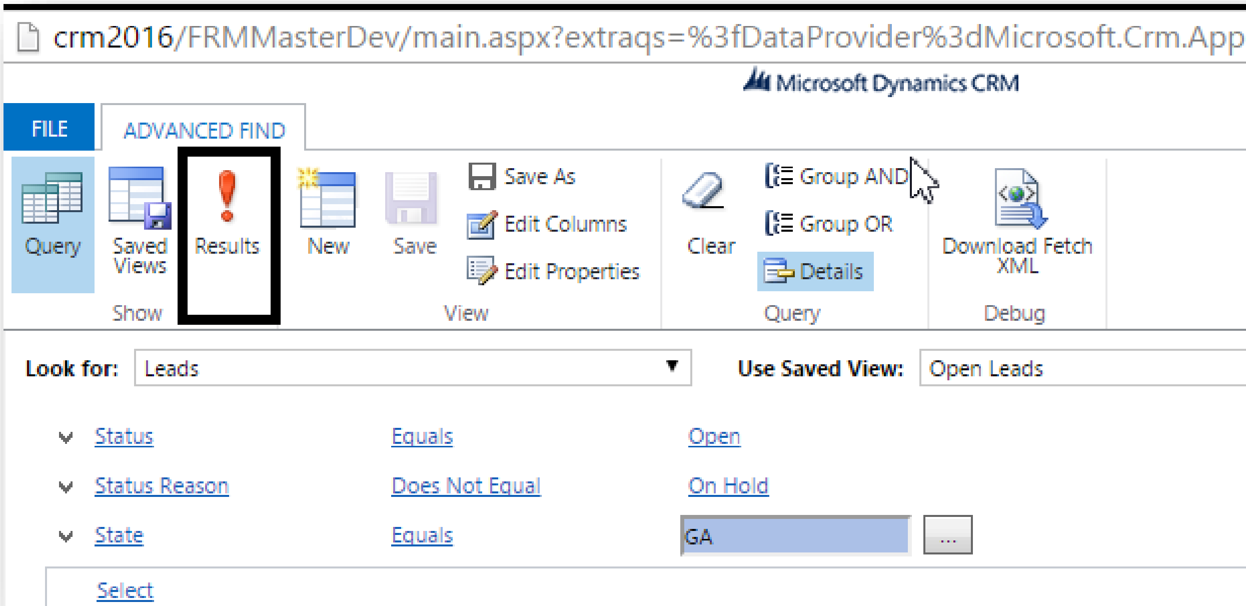


4. In order to add other search criteria, click on **Details** and select the new criteria at your choice.

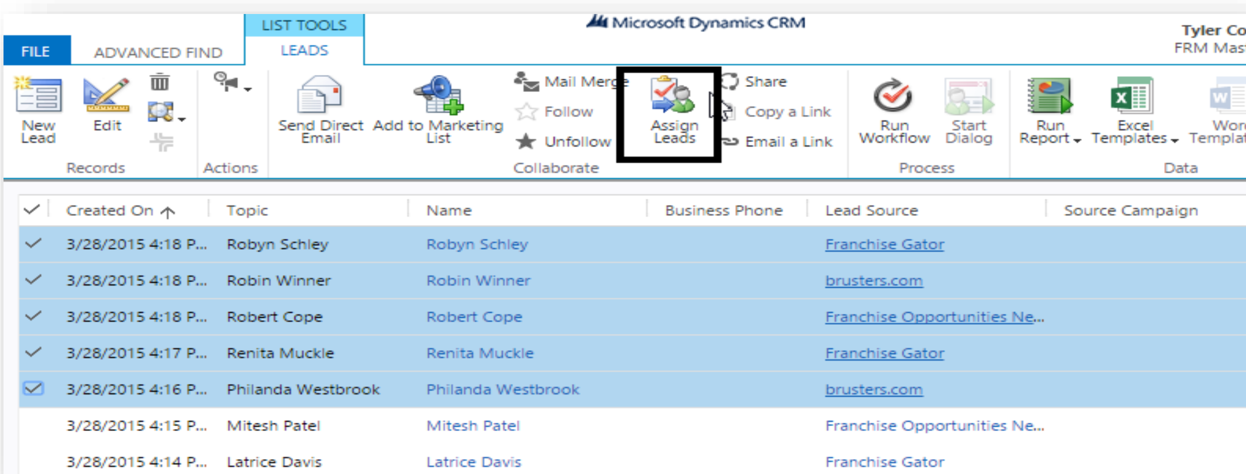




5. Once you have added the new criteria, click on **Results** to retrieve the leads corresponding to the criteria you set:

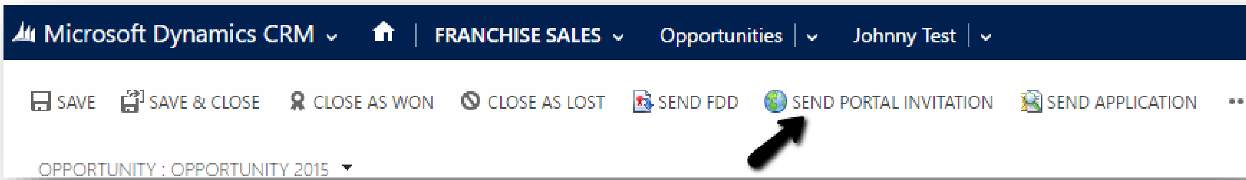


6. Form this view you may select multiple leads and **assign** them to other users of the system

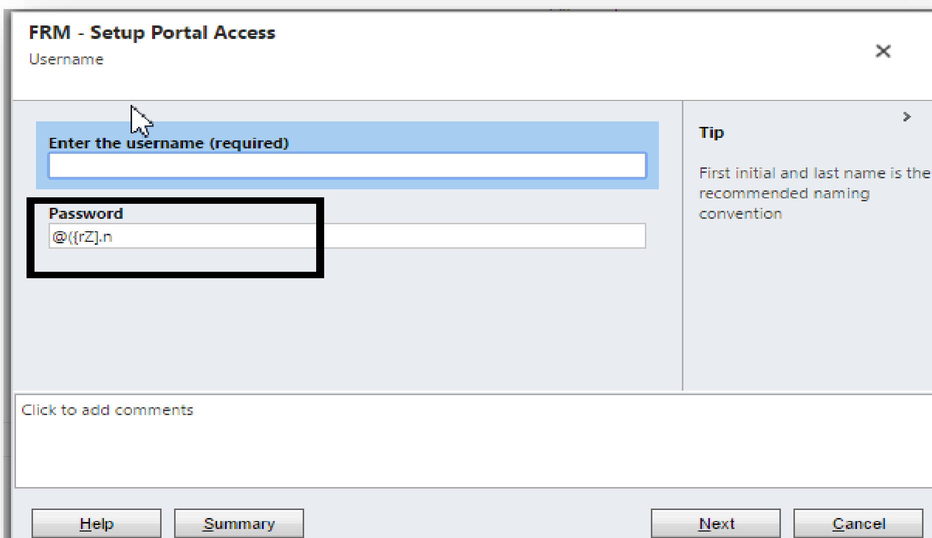


Invite Contact to Candidate Portal

1. Open the opportunity the prospect you would like to grant access is associated with
2. Click “Send Portal Invitation”



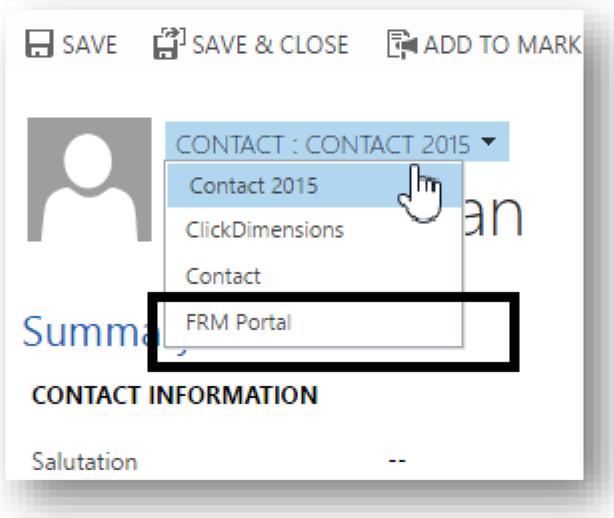
3. In the pop-up window there is an automatically generated password for the contact and you are required to enter a user name for the profile to be created. Please feel free to update the password as you see fit.



4. Click **Next** and then **Finish** options to save your actions.

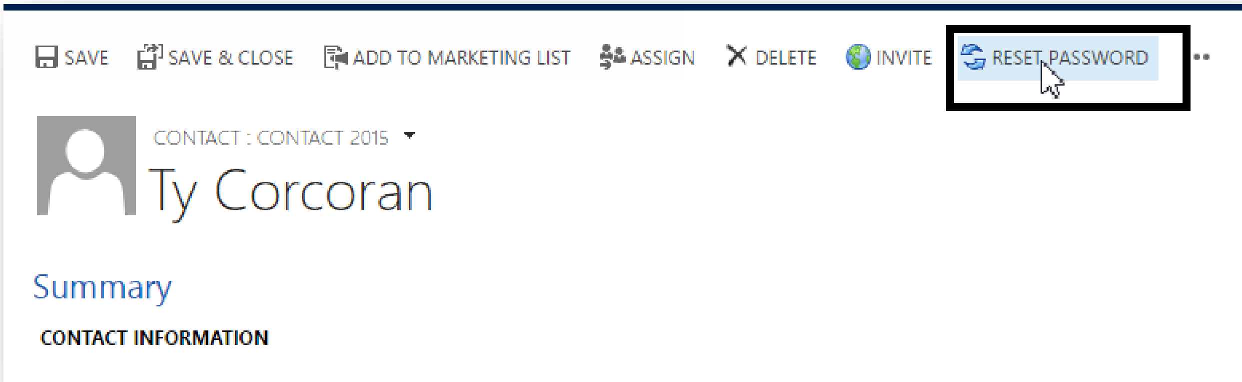
When granting candidate portal access via the opportunity you are actually granting access to the contact (Potential Customer) associated with that opportunity.

If you would like to review or update the results open the contact record and switch from the "Contact Form" to the "FRM Portal" form.

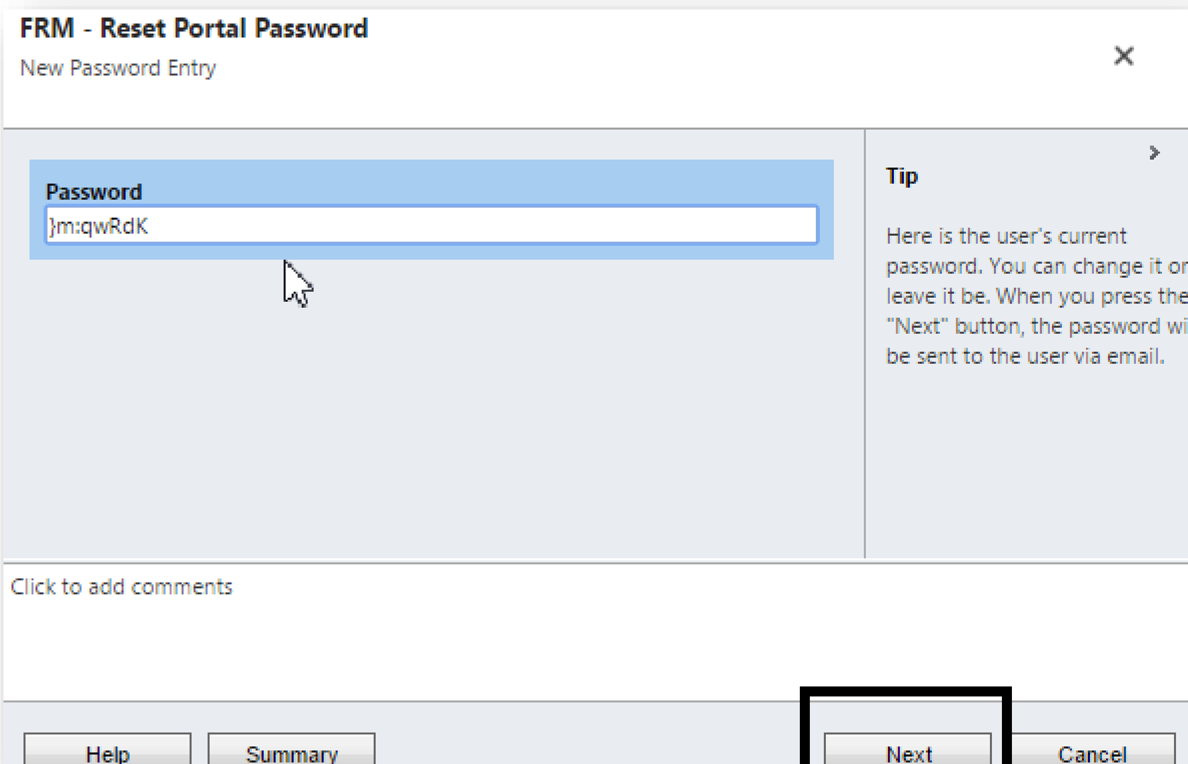


Reset Contact's Candidate Portal Password

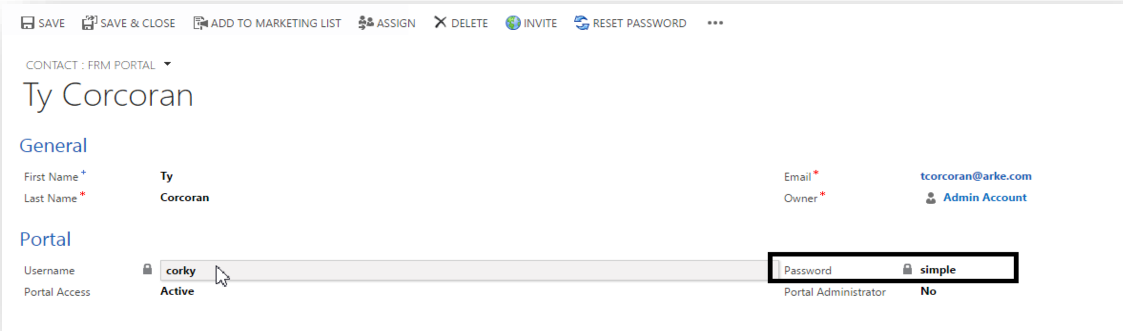
1. Open the contact that you would like to update
2. Select Reset Password from the ribbon



3. In the pop-up window, enter the new password as desired and click on **Next** and then **Finish** to save the changes.

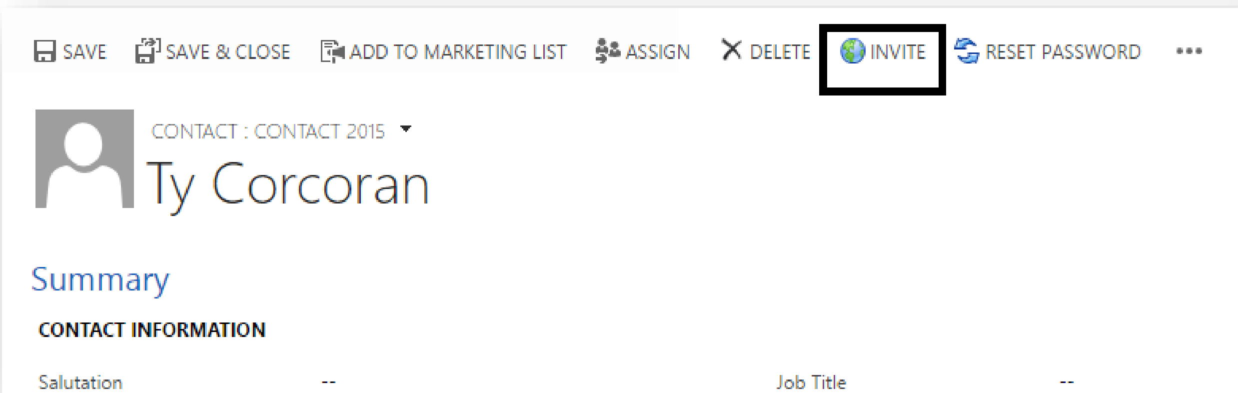


4. In order to verify if the password was changed successfully, you can access **FRM Portal** form on the contact.

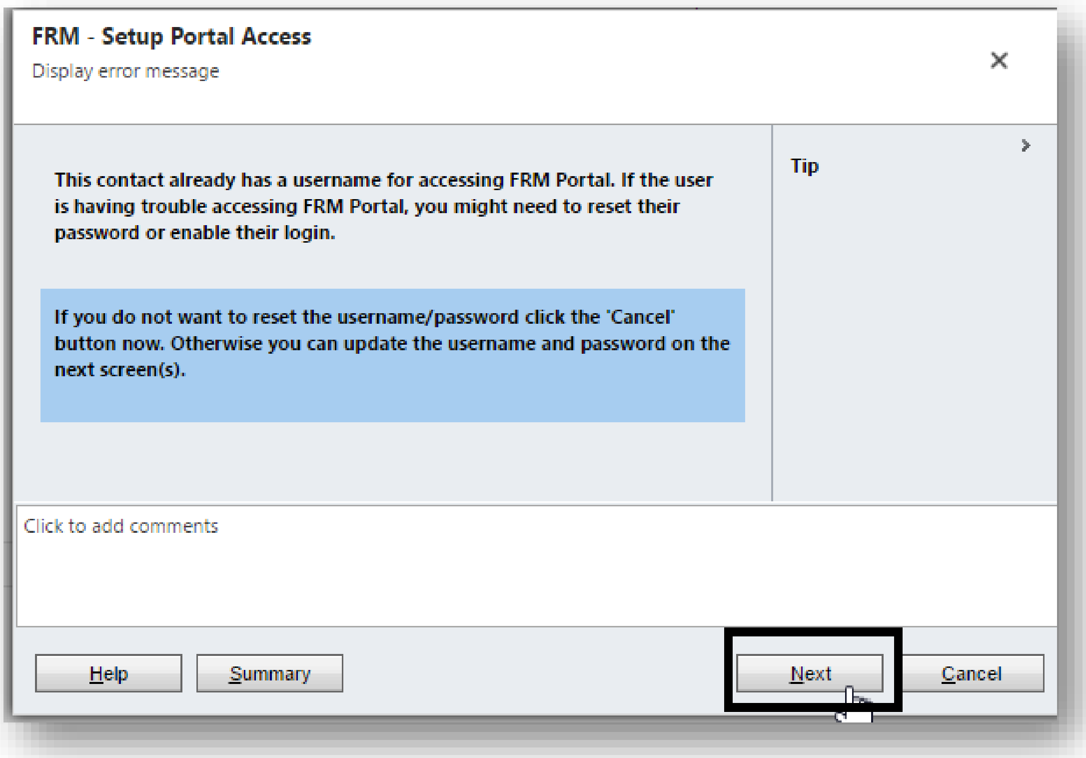


Change Contact's Candidate Portal Username

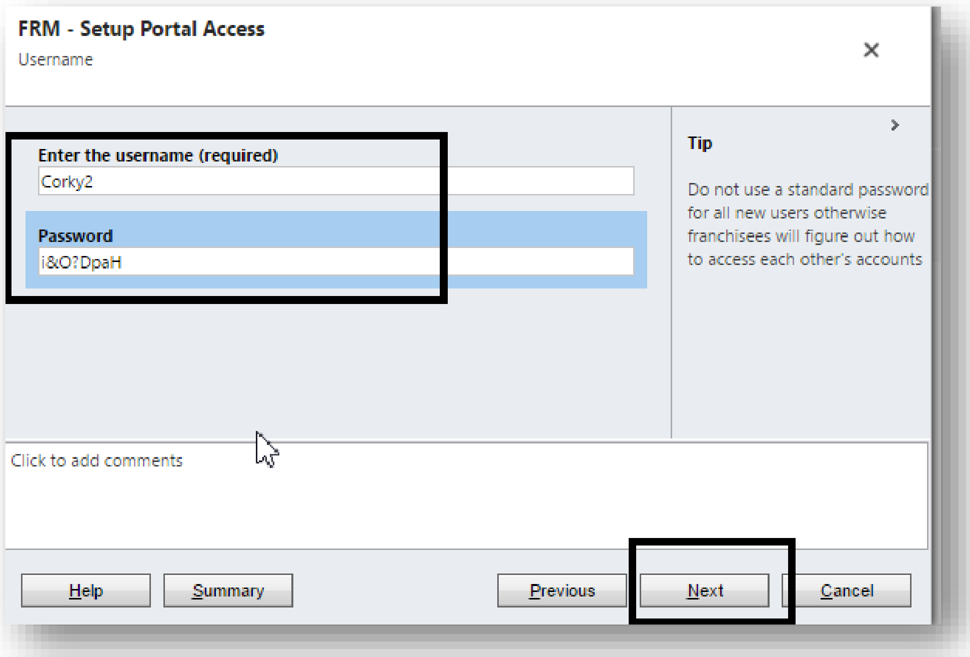
1. Click on the **Invite** option:



2. In the pop-up window, you will receive a message stating that the contact already has a username for accessing **FRM Portal** and that you can update the username and password on the next screen; Click on the **Next** button.



3. You are required to change the username but a password update is optional. Please note, by clicking this a new password will be auto-generated. If you do not want to update the password, you must ensure their current password is entered otherwise it will be updated automatically to the new proposed password.



4. Click on **Next** and then **Finish** to save your changes.

5. You can track these changes under the **Activities** tab (located in the right side of the contact's page); here you will see notification emails from FRM about the changes you performed (e.g. password reset).