



Franchise Growth & Operational Optimization

CLIENT PROFILE

- **Headquarters:** Texas
- **Portfolio:** 2+ franchise locations (Property Management & Maintenance)
- **Market Presence:** State expansion strategy
- **Employees:** 20+
- **Project Duration:** 6 months

BUSINESS PROBLEM

Despite strong brand recognition, the franchise group faced operational inefficiencies that hindered scalability. Challenges included:

Franchise Model Standardization

- Inconsistent property management services across franchise locations, leading to varying tenant and owner experiences and impacting brand reputation.
- Lack of standardized operational procedures, resulting in discrepancies in lease enforcement, maintenance handling, and tenant communication.
- Challenges in tracking franchisee performance, making it difficult to ensure compliance with corporate policies, financial benchmarks, and customer service expectations.

Technology & Process Gaps

- Limited use of automation, causing inefficiencies in lead conversion and work order management.
- No centralized CRM or standardized workflow tools, leading to inconsistent customer experiences.

Training & Compliance Alignment

- Franchisee lacked a structured onboarding and training process
- No clear framework for compliance audits or ongoing performance monitoring
- Franchise owner struggled with maintaining corporate-aligned operational strategies

HOW WE SOLVED IT

Operational Standardization & Playbook Development

- Developed a comprehensive Operations Playbook, outlining standard operating procedures (SOPs) for all franchise locations
- Created a scalable training model, ensuring consistency in operations, service delivery, and compliance
- Implemented regional performance benchmarks, allowing the franchisee to measure success against key industry standards

Technology Integration & Automation

- Designed and implemented a centralized CRM and task management system, improving customer retention and franchisee efficiency
- Integrated Monday.com for process oversight, streamlining franchisee workflows and accountability
- Established automated KPI tracking dashboards, enabling real-time performance monitoring

Franchise Training & Compliance Audits

- Developed an onboarding program, reducing franchisee ramp-up time by 40%
- Conducted compliance audits and operational reviews, ensuring adherence to brand standards and industry regulations
- Built out a structured support system, offering the franchise owner ongoing consulting and performance coaching

AT A GLANCE

CHALLENGES

- Lack of operational consistency across franchise locations
- Minimal technology use, leading to inefficiencies
- No structured training or compliance monitoring

STRENGTHS

- Well-established brand with strong growth potential
- Franchise owner supports improving operations and scalability
- Willingness to invest in training, technology, and process optimization

RESULTS

- **30% increase in profitability** through streamlined operations and improved customer retention
- **40% reduction in onboarding time**, accelerating franchise expansion
- **50% increase in efficiency** with workflow automation and technology integration
- **Stronger brand consistency**, leading to higher customer satisfaction and franchise growth



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Deb, a self-described "Fixer," specializes in driving growth with lean management. As a fractional implementer, she builds foundational structures, defines roles, sets KPIs, and trains teams to perform at their best. Deb delivers actionable solutions to disrupt markets, boost accountability, and unlock new revenue opportunities, helping businesses break free from complacency and achieve sustainable growth.