

**CGI FRANCHISE**

# **BUILDING AND MANAGING A WINNING RECRUITMENT BUDGET**

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We Get Franchise Recruitment.

# Building and Managing a Winning Recruitment Budget



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# Objective for today's session

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- You will walk away with:
  - Understanding why a budget is important
  - Gain knowledge on how to monitor and manage resources and results...actual vs. budget
  - Best practices and the right metrics to develop and implement your budget



# Why great budgeting is critical:



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- Allows management of the recruitment plan / recruitment margin
- Ability to focus on goals and future planning
- Organization of investment
- Early detection for problems / poor ROI
- Team investment
- Determine total Revenue / Signing, Investment / Signing





# Great budgets come from great plans

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- Objectives of budget / what goals are being accomplished
  - Break-even, profit, loss
- Team needed to support the plan
- Marketing assessment – determine strategy and program needed
- One-page summaries
- Supplemental Budget – Go into the detail – Take the time that is needed to get the full picture
- Budget Template
  - Revenue
  - Expenses

**Key: Involve the team for respective**



# Building a great budget: Expenses



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- Include all expenses:
  - Team Development (Training, coaching, role-playing, recordings, ride-a-longs, consulting)
  - Research and development (Trends, conferences, books)
  - Discounts (Veterans, struggling unit transfers, reduced initial fees)
  - Advertising (Portals, social media, SEO, SEM, PPC, etc.)
  - Referral Networks (Monthly fees, signing fees, shows)
  - Technology (CRM, phone, other)
  - Legal (FDD, franchise agreements)
  - Office supplies / Postage
  - Discovery Days (meals, booklets)
  - Team (Salary, 1099, commissions, travel)
  - Vendors (Third party / Outsourced)

Category	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Advertising													
Direct													
Indirect													
Marketing													
Publicity													
Sales													
Other													
Total													
Advertising - Other													
Publicity													
Sales													
Other													
Total													
Technology													
Software													
Hardware													
Other													
Total													
Office Supplies													
Supplies													
Postage													
Other													
Total													
Discovery Days													
Meals													
Booklets													
Other													
Total													
Team													
Salary													
1099													
Commissions													
Travel													
Other													
Total													
Vendors													
Third party													
Outsourced													
Total													



# Building a great budget: Revenue



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- Direction from Executive/ Leadership Team
- What fees are being allocated to recruitment
- Determine goal for 18 months out
  - New
  - Resale / Transfer
  - Conversion / Acquisition
  - Existing vs. New Franchisees, Other

	2019						Total	2020												Total
	Jul	Aug	Sep	Oct	Nov	Dec		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Number																				
New	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Agreements Signed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
New	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Revenue	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0





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