



5 Bucket Worksheet

This worksheet is designed to help you fill the 5 Buckets (need, fit, timeline, financial, and decision criteria) during your Step 1 call with a candidate. You will be able to complete this worksheet by having an open and direct dialogue about who the candidate is and what they are looking to accomplish. Use this tool to help guide you through your Step 1 call. The 5 Bucket Worksheet should be completed during Phase I of the process. This worksheet should be saved to your CRM system and will be part of your candidate file used on Discovery Day.

The 5 Buckets:

Need:

What are the candidate's intentions, wants, goals? What is their vision for the future? How would they define success?

Timeline:

When do they want to be up and operating a business? In training? Making a decision? Does this allot enough time to acquire licenses and set up a business structure?

Fit:

Do you see 'enough' traits, skill sets, life, and work experience that match? This section is to learn about their background. Is there an industry match? Does their DiSC and/or resume match our brand and who we look for?

Decision Criteria:

Do you and the candidate have a prioritized list that they will be using to make their decision? Do you know if your franchise is able to deliver on these priorities?

Examples: Flexibility, Real Estate, Owner/Operator

Are these items written down and agreed upon by the candidate and the recruiter?

Financial:

What is their financial history? Do they have a funding path in place? Net worth? Expectations? Liquidity? Does it make 'enough' sense?



