

FRANCHISE BUSINESS PLAN TEMPLATE

FRANCHISE CONNECT LIVE - VIP RESOURCE



SECTION 1: EXECUTIVE SUMMARY

Business Name:

Your Name:

Location/Market:

Franchise Brand Name:

Business Type (Retail, Service, B2B, etc.):

SUMMARY:

Briefly describe what franchise you're pursuing, your goals for ownership, and why you chose this brand.

Example: "I plan to open a Bricks 4 Kidz franchise in Atlanta to bring STEM learning to underserved neighborhoods. I am passionate about education and see this as a way to build generational wealth."

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SECTION 2: ABOUT YOU (THE FRANCHISEE)

BACKGROUND & EXPERIENCE:

Highlight your work history, skills, certifications, and why you're a strong candidate.

WHY FRANCHISING?

Explain your motivation for choosing franchising vs. starting from scratch.

PERSONAL STRENGTHS & SKILLS:

- Leadership

- Sales/Customer Service:

- Management/Operations:

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SECTION 3: BUSINESS GOALS

YEAR 1 GOALS:

- Revenue target:

- Customer acquisition:

- Local outreach plan:

3-YEAR VISION:

Describe your ideal future — # of locations, staff, community impact, etc.

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SECTION 4: PRODUCTS & SERVICES

FRANCHISE OFFERING:

What will you sell or offer through your franchise?

UNIQUE SELLING POINT (USP):

How will you stand out in your local market?

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SECTION 5: MARKET & LOCATION

TARGET MARKET:

Who are your customers? (Families, professionals, schools, etc.)

TERRITORY:

Where will your location(s) be? Does the franchisor offer exclusivity?

COMPETITION:

List 2–3 competitors and why you can win in this space.

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SECTION 6: MARKETING & OUTREACH PLAN

GRAND OPENING STRATEGY:

What will you do to create buzz and visibility?

ONGOING LOCAL MARKETING TACTICS:

- ☐ Networking & community engagement
- ☐ Local partnerships
- ☐ Digital ads/social media
- ☐ Email marketing
- ☐ Events/workshops

SUPPORT FROM FRANCHISOR:

What marketing help will the franchisor provide?

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SECTION 7: FINANCIAL PLAN

INITIAL INVESTMENT:

Total cost to launch: \$

What it covers (fees, build-out, equipment, etc.):

FUNDING SOURCES:

- ☐ Personal funds
- ☐ SBA loan
- ☐ 401(k) rollover (ROBS)
- ☐ Other

MONTHLY EXPENSES (ESTIMATE):

• Rent:

• Royalties:

• Marketing:

• Staffing:

REVENUE PROJECTIONS:

• Month 1:

• Month 6:

• Year 1:

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SECTION 8: OPERATIONS PLAN

DAILY RESPONSIBILITIES:

Who's running the business day-to-day?

STAFFING PLAN:

- of employees:
- Roles:

HOURS OF OPERATION:

SYSTEMS & TOOLS:

Will you use franchisor's POS, CRM, etc.?

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✓ SECTION 9: LEGAL & COMPLIANCE

BUSINESS ENTITY TYPE: (LLC, S-CORP, SOLE-CORP)

LICENSES/PERMITS NEEDED:

INSURANCE PLAN:

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SECTION 10: TIMELINE TO LAUNCH

MILESTONE	TARGET DATE
Franchise Selected	<input type="text"/>
FDD Reviewed	<input type="text"/>
Funding Secured	<input type="text"/>
Lease Signed (if retail)	<input type="text"/>
Training Completed	<input type="text"/>
Grand Opening	<input type="text"/>