



Franchise Management Software Evaluation Template

Make sure your Franchise Operations, Franchise Sales Management and Franchisee Field Service Management software features add up to meet your needs.

Instructions: Add 0 or 1 point for each feature and check the total scores to compare vendors on page 2.

Software Features



Franchise Operations

Secure Intranet for Brand Management & Collaboration

Franchisee directory with territory management	1
Document sharing and storage	1
Compliance management and tracking	1
Coordination and brand management of system-wide marketing campaigns	1

Interactive Help Desk for Franchise Support

Discussion forums	1
Knowledge base of common how-tos	1
Help desk including support ticket management	1

Automatic Royalty Invoicing for Royalty Management

Royalty calculator	1
Royalty invoicing	1
Collection and processing of royalty payments	1
Tracking of paid and unpaid royalties	1
Custom royalty reporting	1

Franchise Sales Management

Franchise Sales Lead Management

CRM for managing sales leads	1
Automated campaigns and communications using email and SMS	1
Sales team management	1
Web portal for secure prospect communications and document transfer	1
Franchise sales reporting and dashboard	1

Call Center Interface for Franchise Development and Customer Service

Contact management	1
Call scheduling	1
Call notes interface	1
Intranet for sales documentation	1

Software Features



FRANCHISEE FIELD SERVICE MANAGEMENT

Operations

Location-specific settings including taxes and prices	1
Labor & Resource (crew) management	1
Location-specific marketing automation and brand management	1
Service zones with tax rate management	1

Customer CRM

Customer / contact database	1
Management of recurring customers and associated services	1
Storage of communication logs and customer history	1

Estimating and Work Order Management

Consistent methodologies for estimates across the entire brand	1
Standardized work order management and workflow	1
Crew arrival notifications for customers via email and SMS	1
Infield invoicing and payment processing	1
Quality Assurance (QA) with service completion forms and customer follow-up	1

Scheduling and Employee Management

Management of employee roles and availability schedules	1
Scheduling of employees and resources like crews and trucks	1
Break up large territories into manageable service zones	1
Timesheets, payroll and commissions management	1

Mobile Access for Field Service Management

Mobile access to customer information	1
Mobile estimating and work order management	1
Mobile job calendar and routing	1
Mobile job completion and service verification	1
Mobile payment collection	1
E-signatures	1

Route Optimization for Efficient Field Service

Automatic route planning	1
Real time route recalibration	1
Integration with Google Maps	1

OTHER

All solutions and features work seamlessly together	1
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TOTAL SCORE

36