



CHECKLISTS TO KEEP YOU ORGANIZED

Franchise Onboarding Checklist

The franchise onboarding process helps you provide new owners with the information and resources they need to start strong. Use this franchise onboarding checklist to make sure you follow a consistent process for opening every new location.

1. Legal and financial

Franchisor

- ☐ Provide FDD at least 14 days before the agreement is signed
- ☐ Confirm territory and site
- ☐ Set up royalty collection process and confirm payment schedule

Franchisee

- ☐ Review FDD before signing
- ☐ Verify local licensing/permits
- ☐ Set up business entity
- ☐ Secure business insurance
- ☐ Complete any financial tasks

2. Training and brand standards

Franchisor

- ☐ Deliver operations manual
- ☐ Conduct initial brand training
- ☐ Provide SOPs for all services
- ☐ Communicate quality standards and expectations

Franchisee

- ☐ Complete initial brand training
- ☐ Review operations manual, SOPs, and quality standards
- ☐ Document questions and any gaps noticed during training

3. Operations and technology

Franchisor

- ☐ Provide field service software
- ☐ Offer software setup training
- ☐ Send job templates
- ☐ Suggest scheduling, quoting, and communication workflows

Franchisee

- ☐ Set up vendor accounts
- ☐ Source tools/materials/supplies
- ☐ Prepare branded vehicles
- ☐ Order uniforms
- ☐ Set up process workflows
- ☐ Set up communication templates

4. Hiring and HR

Franchisor

- ☐ Send QA checklists for test jobs
- ☐ Provide staff training materials and job shadowing protocol

Franchisee

- ☐ Run test jobs end-to-end (booking to invoicing)
- ☐ Do QA checks on test jobs
- ☐ Request reviews from early customers
- ☐ Hire staff before opening day
- ☐ Complete staff training and job shadowing

5. Marketing and launch

Franchisor

- ☐ Set up the location page on the brand website
- ☐ Provide brand assets for grand opening campaign
- ☐ Suggest marketing plans or promotional campaigns

Franchisee

- ☐ Plan and execute grand opening campaign
- ☐ Offer special promotions
- ☐ Execute community outreach
- ☐ Conduct final systems check

6. Post-launch (30/60/90 days)

Franchisor

- ☐ Review franchisee performance reports
- ☐ Provide feedback on early data to help refine workflows
- ☐ Monitor location performance and offer support before issues escalate

Franchisee

- ☐ Manage local lead flow
- ☐ Conduct regular performance reviews
- ☐ Build marketing campaigns to grow customer base
- ☐ Submit performance reports to franchisor
- ☐ Refine workflows based on franchisor feedback