



FRANCHISE CONFERENCE ROADMAP

INTRODUCTION & INDEX



CONFERENCE QUICKSTART: CHAIR INSTRUCTIONS

Enclosed you will find everything needed to expertly produce a revenue-driving franchise event while relying entirely on internal staff members. This Roadmap, a team of 4-9 Area Leads, and a weekly meeting for decisions and accountability together form the foundation of a streamlined, methodical process based on best practices. When carried out as instructed, the company can stand out from the competition while avoiding the upheaval and missed details that often disrupt daily operations when producing this critical, annual event.

7-STEP CONFERENCE QUICKSTART:

1. **Read Roles & Responsibilities** to understand the team required.
2. **Determine a Conference Chair** who will oversee the entire process.
3. **Initiate a Captive Meeting Card** to track all conference expenses.
4. **Review the Weekly Meetings section**, including all agendas, to understand the overall process.
5. **Determine Area Leads and other Conference Committee Members** needed for their input, such as key executives/management, and provide Leads with their section of this document. (All Leads, but especially Content Planning, Logistics, Registration, and Vendor Management, require high Wonderlic scores).
6. **Complete the Site Selection section** shortly after the last conference concludes. In subsequent years, ensure the initial contract deposit is paid with the Captive Meeting Card.
7. **Schedule the first Conference Committee meeting** for Countdown Week 26 and review that meeting's agenda in more detail; prepare any needed items prior to the meeting.

IN THIS SECTION:

1. Roles & Responsibilities
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 - b. Weekly Time Estimates by Area
 - c. Creative Director
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PROPRIETARY & CONFIDENTIAL INFORMATION

This conference strategy now represents a confidential and proprietary business model which further differentiates the franchise from its competition and other franchise systems. While this model is licensed to the Company for its exclusive use, it remains the sole property of RISE Strategic Solutions and is protected as copyrighted material. The Roadmap in its entirety should not be shared with anyone aside from the Executive Leadership of the company. Area Leads should only be provided with their own sections to protect the company’s proprietary information. No segment of the Roadmap should be placed on a shared network drive, provided to partners, vendors, suppliers, or the venue unless specifically stated in a Roadmap task (e.g., A/V Bid Request, etc.).



FRANCHISE CONFERENCE ROADMAP

ROLES & RESPONSIBILITIES

Before the Conference Kickoff, determine all Area Lead assignments based on the qualifications, time commitments and your available staff. You may have one Lead for each Area to spread responsibility and minimize impact on other job functions, or consolidate roles as needed.

AREA	AREA LEAD DESCRIPTION	AREA LEAD QUALIFICATIONS	POSSIBLE CONSOLIDATION
CONFERENCE CHAIR	Directs all other area leads, leads weekly meetings and makes /follows up on assignments, makes final decision on any issues needing resolution. Provides Logistics with executive decisions to determine spending levels for all discretionary areas. On site, the Conference Chair plays an executive role, is often a presenter.	Corporate event experience, executive authority, generally the COO or Head of Marketing.	Conference Chair
CONTENT PLANNING	The Content Planning Area Lead identifies the event goals, theme, branding, signage, topics, presenters, keynote, entertainment and activities. This Lead determines the agenda, assigns and directs presenters, and reviews/approves all content. With Communications, the Lead oversees the Creative Director to visually implement event theme and content. On site, the Content Planner plays an executive role and is often a presenter.	Strategic management, communications, and corporate event experience, preferably with executive authority. Generally the head of marketing.	Conference Chair
SITE SELECTION	Leads destination selection and venue criteria, works with venue selection partner to review and narrow options, visits and evaluates finalist locations, selects venue, negotiates and signs contract before handing off to Logistics.	Corporate event experience, one of the above or an experienced Logistics Lead.	Conference Chair Logistics
COMMUNICATION	Manages all Owner communication relating to the event, builds enthusiasm for the event, copy writes print and scripts awards banquet, interludes, and kickoff video, or manages outsourced provider. Coordinates with Creative Director. Answers incoming Owner questions about the event. On site, manages the Awards Banquet, is the handler for the Keynote, Photographer, and Videographer, assists with Registration and house lights as needed.	Excellent communication, marketing, writing, administration and customer service. Generally a Marketing Coordinator or Manager.	Communications Manager
AWARDS	The Awards Area Lead solidifies awards criteria, verifies awards to be given each year, gathers and verifies data, orders and audits award materials, contributes to award ceremony script, and tracks results annually. This person is not required to attend conference, but if they are on site can inventory and quality check the awards shipment and help set out awards before the Banquet.	Strong operations, data and project management skills. Operations or Marketing Coordinator/Analyst.	Communications Manager



FRANCHISE CONFERENCE ROADMAP

AREA	AREA LEAD DESCRIPTION	AREA LEAD QUALIFICATIONS	POSSIBLE CONSOLIDATION
REGISTRATION	Manages the registration platform, tracks and promotes registration progress, works with Logistics to provide counts for registration materials. Reports frequently and analyzes trends. On site, coordinates onsite event registration, trains registration staff, attends to all registration issues.	Excellent communication, data management, Excel, attention to detail, technical, administration, customer service. Ops or Marketing Analyst/Manager	Registration Manager While this could theoretically be combined with Logistics or Communication to be a very hefty job, it needs to be a separate person to fill all on-site conference responsibilities.
LOGISTICS	Manages all communication with the venue staff for rooms, food and beverage needs, layout, and hotel needs. Manages and tracks minimums, attrition, changing meal counts, setup requirements, verifies/signs BEOs, conducts pre-event visit if possible, attends precon, liaisons with hotel throughout event. Coordinates all procurement/purchasing, facilities, equipment, event suppliers and staff to ensure smooth event execution, and is the primary coordinator during event. Orders all materials in line with the Committee's decisions. Coordinates layout, placement and traffic flow. Arranges all payments.	Excellent communication, data management, negotiation skills, attention to detail, strong Excel, administration, interpersonal skills, procurement experience. High integrity (purchases all approved expenditures). Ops or Marketing Analyst/Manager	Logistics Manager
VENDOR MANAGEMENT	Manages the Vendor Marketplace and all vendor communication relating to the event, tracking sponsorship and exhibitor participation, needs and data. Oversees Exhibitor Guide production. Sells participation in the event to maximize sponsorship/exhibitor income. Coordinates onsite vendor registration and assistance. Acts as host to all sponsors and vendors throughout the event.	Excellent communication, sales, data management, attention to detail, administration and customer service. Ops or Marketing Analyst/Manager	Vendor Manager
MEDIA MANAGEMENT	The Media Manager assists with the development, creation, organization and presentation of all audio visual media for the conference, including presentations, video, music. This Lead is the primary liaison with the AV vendor, and sources that vendor. The Media Manager creates, directs and assists with the AV Show Flow of the entire production. On site, the Media Manager remains at the Tech Table (audio video booth) throughout conference and directs the show.	This role requires project management, PowerPoint/Excel, and organizational skills. AV experience and video creation/editing ability are a plus. Marketing/IT Analyst/Manager	Media Manager



FRANCHISE CONFERENCE ROADMAP

WEEKLY TIME ESTIMATES BY AREA

The conference production commitment to implement this plan entirely with internal staff equates to 1280 work hours, or approximately 30 FTE weeks. When allocating staff, use the weekly estimations below to calculate how regular responsibilities must be rearranged. Alternatively, RISE can be retained to fill any role individually, or all roles (see Logistics Worksheet options).

AREA	HRS	26	25	24	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1	0	-1	-2
COMMUNICATION	311			3	1	1	1	5	7	3	1	5	5	2	2	7	17	10	18	14	10	10	27	22	40	30	10	40	16	4
CONTENT PLANNING	183		4	8	4	3	3	5	3	13	13	7	5	7	5	4	4	2	2	1	1	1	2	12	8	16	4	40	2	4
LOGISTICS	275			3	1	1	5	9	16	16	16	8	8	8	16	30	16	8	8	16	4	4	2	4	8	8	12	40	4	4
MEDIA MANAGEMENT	98			3	1	1	1	1	1	1	1	1	3	2	1	1	1	1	1	1	3	1	12	8	4	2	2	40	2	2
REGISTRATION	149			3	4	1	5	5	10	4	5	3	2	5	2	2	2	2	4	2	4	4	5	10	5	4	8	40	4	4
VENDOR MANAGEMENT	206			3	4	8	2	4	2	2	6	14	3	8	4	8	4	12	10	5	9	9	7	10	7	7	14	40	2	2
AWARDS	18																					2	8	8						
SITE SELECTION	40	40																												



CREATIVE DIRECTOR

The Conference Creative Director should be selected and briefed prior to the Conference Kickoff with this **Creative Director** document, the **Countdown Week Key**, and a contact list of all Area Leads each year. While generally an outside contractor, the Creative Director can participate in Weekly Meetings by phone or Skype if desired. RISE's Mel Robison has been a fantastic creative Director for the past conferences and has the files and experience with these conferences that will keep expenses down and ensure a strong final product.

DELIVERABLES	COUNTDOWN WEEK FOR EACH STAGE					NOTES
	BEGIN	REV 1	REV 2	REV 3	TO PRINT	
Vendor Sponsorship/ Exhibition Brochure	21	17	16			RISE can provide layout with theme change and copy edits.
Conference Theme	22	21	20	19	17	Three primary theme ideas will be delivered by Countdown Week 22 for concepting and will be narrowed/refined weekly, final at 17.
Web/Email Banner	17				17	Part of theme creative package
Themed Event Signage	16	10	9		8	We recommend replacing vinyl styles with Freestanding 4x8' e-Cores: 2 Registration Banners 2 Entry/Theme Banners 2 Themed Welcome Banners 1 podium wrap Additional signage as requested.
Presentation Template	16	10	9		8	PowerPoint Template Slides unless otherwise indicated: <ul style="list-style-type: none"> • Conference Theme Slide • Presentation Title Slide • Three varieties of presentation content slides (three complimenting colors/designs for variety within each presentation) • Awards Banquet Theme Slide • Awards Banquet Award Title Slide • Awards Banquet Winner Slide • Video Contest Theme Slide: Reality Property Management [2014]
Vendor, Corporate, Owner and Manager Badge Designs	16	10	9	8	4	RISE has badge specs and data fields if needed. It is recommended that Franchise Owners and Franchise Managers/ Employees be differentiated on the badge, so four clearly distinct designs needed in total.



FRANCHISE CONFERENCE ROADMAP

WEEKLY MEETINGS

DELIVERABLES	COUNTDOWN WEEK FOR EACH STAGE					2013 NOTES
	BEGIN	REV 1	REV 2	REV 3	TO PRINT	
Vendor/Sponsorship Banners	10	8	5	4	3	3 Freestanding 4x8' e-Core Sponsor Banners (all sponsors, 1 featuring only Platinum Sponsor)
Conference Guide	9	7	6	5	4	RISE has format if needed to swap out theme change and content changes. No polling pages, two additional full notebook pages, and any other content as directed. (Communications to provide TOC in CD 9)
Game Items for Design	9	7				Items needed will depend on the game chosen. May be incorporated into Conference Guide.
Awards Banquet Program	7	5				Recommend economy brochure size specs, pages if content requires, outlining Awards Agenda, Awards to be given, and highlighting platinum sponsor.
Agenda/Planner	6	5			4	Recommend themed agenda highlighting attendee options, and travel/venue information to be mailed to Owners two weeks prior to conference. Recommend 11x4.5 when bi-folded, a tall brochure similar to boarding pass style. Not confirmed but possible addition. May be emailed rather than mailed, which would require a screen-sized format, possibly a square (re: logo).
Sponsorship/Prizes "Promo Sheet" (optional item)	4				3	One-sheet flyer highlighting Vendor Marketplace prizes, not required but possible addition.
Award Certificates (optional - may not require design)	4				4	RISE has templates if needed.
Comment/Satisfaction Survey Cards (optional - may not require design)	4				3	Normally not submitted through design but finalized by staff member.
Agenda Boards (optional)	3				2	Poster-board size agendas for each day - resize and print as shown in the conference guide or simplified as needed/directed.
Vendor Registration Packet (optional - may not require design)	3				2	May be an info sheet only without design, thanking vendors for coming, providing setup-teardown instructions, vendor map, raffle information/times.



CHAIR TASK: INITIATE CAPTIVE MEETING CARD PROGRAM

Background: While this is coming to be a best practice in the meetings industry, this practice has not yet been adopted by many franchises at an annual conference. A Captive Meeting Card is a dedicated credit card which is the sole method of payment for every related expense for the entire event. This is the ideal way to control and track conference expenses, expedite the payment process to avoid unnecessary delays and reduce administrative efforts. In the past it has been very difficult for companies to capture all expenses related to the conference and prevent payment hassles and problems— both easily solved with a Captive Meeting Card.

Action Steps:

1. At least six months prior to the meeting, apply for a Captive Meeting Card Program with the card provider of choice. As the company has an existing relationship with American Express, this is the logical choice and the most popular meeting card provider. A \$250,000 maximum should be sufficient based on previous years (exhibitor/sponsor/fee income will significantly offset this amount) but be allocated separately.
2. While budgetary items are approved by the Conference Chair, they are purchased and tracked by Logistics, who will be the gatekeeper for all expenditures. Logistics and the Conference Chair are to be the only individuals to use the card and the number will not be shared. Card invoices will be sent to Accounting as with other invoices, but a copy will be provided to Logistics to allow for comprehensive in tracking/reporting.



WEEKLY MEETINGS

GUIDELINES FOR THE CHAIR:

1. **Schedule a recurring, weekly meeting** beginning 23 weeks prior to conference week for all conference committee members. Allow for one hour. Early planning weeks and late in the countdown you may require more time, but the meeting will often run shorter. The nature of these meetings requires attendance, dialing in is acceptable if needed. A midweek meeting time allows for both timely preparation and needed wrap up of the week's items before and after the meeting. Never skip or cancel a meeting, even if all have to dial in; keep the cadence of accountability.
2. **Prepare for the Meeting:**
 - a. **Review the agenda** and note what is to be accomplished.
 - b. **Decide who must attend** and who is optional based on the meeting content. Remind those who have Items for Review to bring them to the meeting.
 - c. **Send the agenda** out at least two days prior to the meeting each week, noting who is required and optional for that week (delegate to administrative staff as desired.)
3. **Meeting Management:**
 - a. **Move quickly**—keep a sense of momentum.
 - b. **Keep discipline.** Begin on time, adhere to time limits. Keep the group on topic; avoid unfocused discussion and tangents until a presentation concludes. Note other thoughts as they arise to bring up later at the appropriate time. Be quick to ask people to take up side issues afterward.
 - c. **Be decisive.** Indecisiveness or “kicking the can” can quickly derail the process. One delayed decision can cause deadlines to be missed across several areas for weeks to come. The process is designed to ensure that you have the needed information to make decisions. Also avoid “groupthink” where every possibility and opinion is discussed with no final result.
 - d. **Maintain accountability.** Make it clear that deadlines are to be strictly kept and timeliness is expected.

GENERAL AGENDA FLOW:

1. **Welcome**, 1 minute. Quick agenda review.
2. **Area Updates**, 3 minutes each. Each Area Lead provides a brief reports on the last week's tasks and the upcoming week's tasks. Quick decisions or questions relating to the tasks that need committee involvement are addressed.
3. **Items to Review**, time varies. The Area lead presents the item with their feedback, all others then provide brief thoughts (or pass if nothing to add). If the item is lengthy or contains copy, the Area Lead will send the item for review prior to meeting so the others can submit their edits/markups at the meeting with their comments, or return by the end of business.
4. **Decision Making**, time varies. The Area lead offers suggested action, all others then provide brief agreement/disagreement/thoughts (or pass if no opinion), and then the Chair gives the final decision.
5. **Questions.** Chair addresses any remaining issues and makes any additional assignments. Confirms the next week's meeting time.
6. **Thank everyone and close meeting.**



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