Checklist: Franchise Evaluation Checklist

Assess the suitability of potential franchise partners



Scaling a business through franchising is a powerful way for entrepreneurs to expand their brand's footprint without a huge personal investment. The goal is to find partners who do not just want "fast money," but who are committed to replicating a successful model.

This checklist is designed to help entrepreneurs who **dreamBIG** assess if a potential partner is the right fit. To use it, the franchiser should evaluate the candidate during meetings and through their formal application. A successful partner is willing to be a student, respects the brand's reputation, and has the operational discipline to follow established systems

How to use this Checklist

This checklist helps the business owner evaluate whether a potential franchise partner is suitable to represent the brand.

The evaluator should discuss each point with the candidate and tick (✔) if the condition is satisfied.

- If most items are ticked → Suitable partner
- If many items are unclear → Needs preparation
- If many items are not satisfied → Not recommended

Mindset and Brand Alignment

☐ Willing to learn and be mentored on how the business operates
☐ Accepts to run the business exactly as the brand system requires
☐ Focuses on customer experience, not only shop appearance
☐ Shows respect for the brand identity and quality standards
☐ Understands success comes from following a proven system
☐ Does not want to change the business model unnecessarily

Operational Discipline

☐ Ready to strictly follow Standard Operating Procedures (SOPs)
☐ Understands and protects the brand’s Unique Selling Propositions (USPs)
☐ Will complete required training personally
☐ Will ensure staff are trained as per brand guidelines
☐ Able to replicate the same system in their outlet without deviation

Financial and Resource Capability

☐ Has total investment amount, including franchise fee
☐ Has working capital for the initial months of operation
☐ Has a budget for local marketing activities
☐ Comfortable paying ongoing royalty/fees
☐ Ready for full involvement in the FOFO (Franchisee Owned Franchisee Operated) model

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Leadership and Communication

☐ Communicates clearly with customers and staff
☐ Can hire and manage a team
☐ Team behaviour will match brand culture and service style
☐ Will use required technology (POS, CRM, reporting apps)

Legal and Ethical Integrity

☐ Understands importance of protecting brand trademark and IP
☐ Willing to sign and follow legal agreement completely
☐ Accepts operational and exit conditions of franchise contract
☐ Follows ethical business practices aligned with brand values

Additional Verification (Mandatory)

☐ KYC verification completed

☐ Reference checks completed
☐ Site visit conducted
☐ Financial proof verified
☐ Agreement explained and understood

Final Evaluation

☐ Strong franchise partner – scale potential
☐ Needs preparation before onboarding
☐ Not recommended

Approved: ☐ Yes ☐ No

Evaluator Name: _____
Date: _____
Remarks: _____

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