

LEMUR- Lead Management Update & Report

INTRODUCTION TO FMS

Franchisors might want to keep track of how much revenue each franchisee is making. FMS enables franchisees to connect with each other, share files etc. Because of FMS all the franchisees function as a single unit. Inventory management and supply chain become simpler. The head office can get real time overview of key financial data like revenue, cash flow, expenses per franchise, profits and losses. Coupled with cloud computing, a FMS can become more scalable and contribute towards business growth. FMS allows franchisors to access such details and functionalities on a single platform. The scope of this system however, is managing leads and setting up criteria for leads that the franchisor sets up. The franchisor can keep track of what criteria which leads satisfy and accordingly can select the desired lead to become the franchisee. The franchisor can draw reports like the number of leads that applied, what percentage of them became franchisees, or what percentage of the franchisees satisfied more than 80% of the criteria set up.

POSITIONING STATEMENT

For franchisors who need to manage multiple leads (franchisee), Lemur is a franchisee management system that allows the franchisor to keep track of all their leads in one place, convert them into franchisee, generate reports and so on.

- a) Unlike other FMS systems, Lemur will provide a simpler start to end lead management process.
- b) Unlike other FMS systems, Lemur using its strong analytics can handle multiple leads and pick the best leads to be converted into a franchise.

PERSONAS:

#1 Bob, the FMS admin

Bob, a 40 something man lives in Campbell. He works at Cheezy Pizza HQ in San Jose downtown. In early stages of his career, he started out as a server and worked his way up to the admin department.

With his hands-on knowledge of how restaurant works and his quest to climb up in his career, he has managed to come this far.

Bob's work involves reviewing the franchisee applications, getting in touch with them to ascertain if they suit, maintain records of suitable applications, and do follow-ups if required.

He thinks a lot of work done by him is repetitive, and consumes a lot of time, not to mention it bores him sometimes to go over records manually, and update everything manually. He feels an automated system to update & keep a track of tasks-list would free up his time to process more applications in a timely manner.

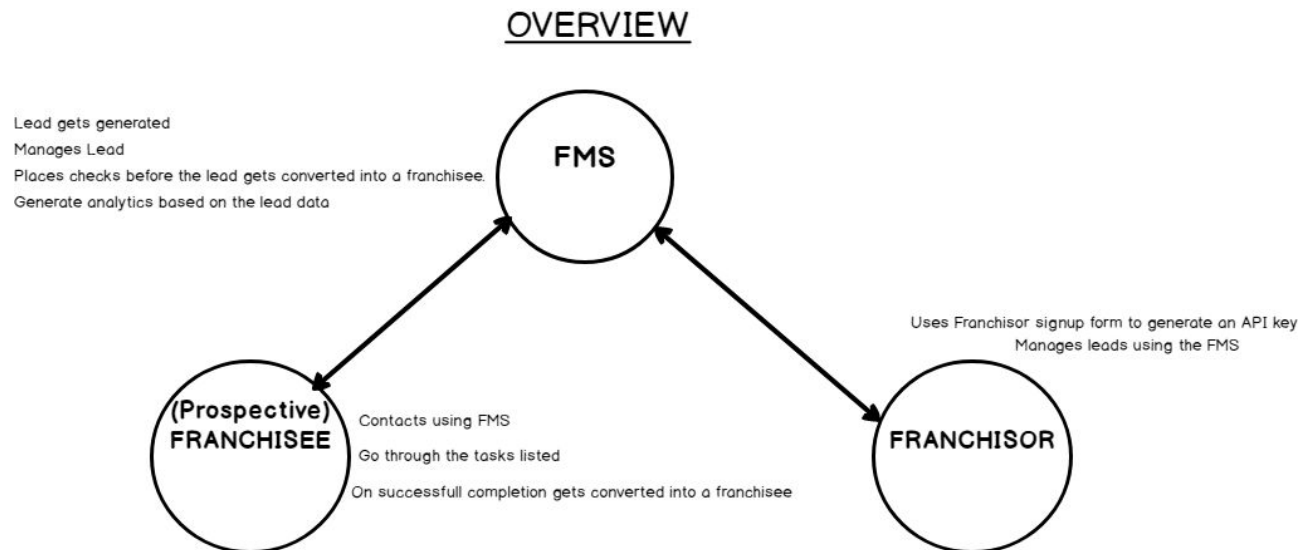
#2 Jessica, the prospective franchise owner

Jessica is a 30 year old ambitious person. She has acquired some land from her late uncle John. She has always wanted to open a restaurant of her own. She thinks that getting a franchise would be a good start. But being a single mom, she feels it would be too much of a trouble making rounds of the Cheezy Pizza headquarters for submitting her documents and other related work. She needs a systems where she can submit her papers from the comfort of her home and see her progress too.

#3 Richard, the local pizza shop owner who would like to expand his business

Richard is a 21 newly graduate living in San Jose. He loves pizza since young and decided to start his own pizza shop three years ago near the SJSU campus. During the three years, his pizza shop built a good reputation and got ranked #2 in that area on Yelp. Some of his customers were driving from Sacramento just to taste his pizza. Thus, he started to consider the expansion of his pizza shop into a franchise to appeal more customers. However, when he was trying to understand how it works, he realized that being franchisor needs to handle a huge amount of paperworks and he can't afford the cost to hire a professional to do the job for him. Such things should not be this complicated. He felt overwhelmed by the idea, and decided to wait until there is a good online tool for him to do all of these in an easy way.

FLOW DIAGRAM



DESIGN MOCKUPS

Franchisor Sign up Form

Name of the Organization

Address

Contact No

Email Id

Franchisor uses this sign-up form to get access to the system and will be provided a unique key. The same key would be provided to prospective franchisee when they sign up. The unique key is will also be used to make the API calls for lead generation.

Successfully Submitted!

Thank you for chossing us .
Please find your unique key
ZVHGVGHVHG6t77.

HomeMenuDeliveryContact Us

Jane Doe Pvt Ltd

Contact Us

If you seek a rewarding opportunity, and have the qualifications, drive and commitment to open your own Jane restaurant, your first step is to apply today. Submit your information below, and we will contact you once we receive your completed application.

Name

Hopeful franchisee

Email

hopeful.franchisee@example.c

Location (City)

Hopeville


Contact No

1-800-HOPE

Reset

Submit

The prospective franchisees will use this to connect with the franchisor. Once the user clicks the submit button, a lead is generated in the FMS system. This particular html form or page can be placed in other locations, such as google/fb ads,etc

 LOGIN


Email

Password

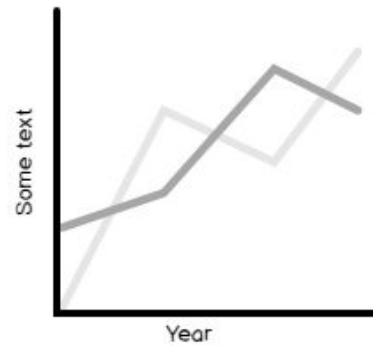
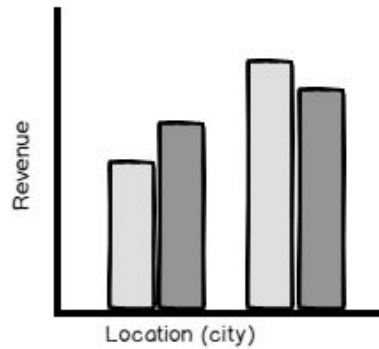
☐ franchisor

☐ franchisee

Login



Dashboard



Tasks List

Task Name	Task Description	Additional Information
<input type="text"/>	<input type="text"/>	<input type="text"/>



Each franchisor can define his/her own tasks that need to be fulfilled by a hopeful franchise.

Submit



Leads List

Lead No	Lead Details	Location(City)	Email	Contact Info	Date
123	Lorem ipsum dolor sit	San Jose	jan@doe.com	1298875498	3/14/2018
124	Excepteur sint	Los Altos	a@b.com	9873473844	3/13/2018
...	
...	
342	Excepteur sint	Los Gatos	c@b.com	98734343844	2/12/2016

[1](#) [2](#)

Leads List

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123	Lorem ipsum dolor sit	San Jose	jan@doe.com	1298875498	3/14/2018
124	Excepteur sint	Los Altos	a@b.com	9873473844	3/13/2018
...	
...	
342	Excepteur sint	Los Gatos	c@b.com	98734343844	2/12/2016

Hopeful Franchisee a@b.com

The "Approve" button remains inactive if not all tasks are completed.

Task No	Task Description	Status	Additional Information
1	Lorem ipsum dolor sit	Completed	n/a
2	Excepteur sint	Pending	n/a
3	cillum dolore	Pending	Pending cillum
4	Lorem ipsum dolor sit	Pending	n/a
5	Lorem ipsum dolor sit	Pending	n/a
6	Lorem ipsum dolor sit	Pending	n/a
7	Lorem ipsum dolor sit	Pending	n/a

Approve

Franchisor Admin

Leads List

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123	Lorem ipsum dolor sit	San Jose	jan@doe.com	1298875498	3/14/2018
124	Excepteur sint	Los Altos	a@b.com	9873473844	3/13/2018
...					
...					
342	Excepteur sint	Los Gatos	c@b.com	98734343844	12/12/2016

Hopeful Franchisee

a@b.com

X

Task No	Task Description	Status	Additional Information
1	Lorem ipsum dolor sit	Completed	n/a
2	Excepteur sint	Completed	n/a
3	cillum dolore	Completed	Pending cillum
4	Lorem ipsum dolor sit	Completed	n/a
5	Lorem ipsum dolor sit	Completed	n/a
6	Lorem ipsum dolor sit	completed	n/a
7	Lorem ipsum dolor sit	Completed	n/a

Approve

Once all the tasks have been completed by the franchisee, the Approve button gets activated.

Hopeful Franchisee

Task Board

Task No	Task Description	Status	Additional Information	Edit
1	Lorem ipsum dolor sit	Pending	n/a	
2	Excepteur sint	Completed	n/a	
3	cillum dolore	Pending	n/a	
4	Lorem ipsum dolor sit	Pending	n/a	
5	Lorem ipsum dolor sit	Pending	n/a	
6	Lorem ipsum dolor sit	Pending	n/a	
7	Lorem ipsum dolor sit	Pending	n/a	

Completion of all task there be a welcome page as a franchisor for the respective company.