

LEMUR- LEad Management Update & Report

INTRODUCTION TO FMS

Franchisee Management System assists with the onboarding of new franchisees, communications, compliance notifications and lead management. Apart from this FMS also provides the functionality to keep track of revenue, each franchisee is making. Enables the franchisees to connect with each other, share files etc, thus making all the franchisees function as a single unit. It simplifies inventory management and supply chain. The head office can get real time overview of key financial data like revenue, cash flow, expenses per franchise, profits and losses.

FMS allows franchisors to access all this 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 Andrew, the FMS admin

Andrew, 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.

Andrew'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 Bob, operations manager at Cheezy Pizza

Bob is a 35 year old Operations manager at Cheezy Pizza admin department. He is an MBA grad, and has been roped in to increase company's revenue generated via lead management. One of his core jobs is to communicate with other management professionals within the organization to keep the company running smoothly, and communicating with other companies and organizations with which the company does

business. He is responsible for putting together reports and financial statements that are essential for other top executives within the company or organization.

He is interested in a system that will allow him to pull up reports showing the number of leads generated in a quarter, how many of them were scored, location wise franchisee revenue etc.

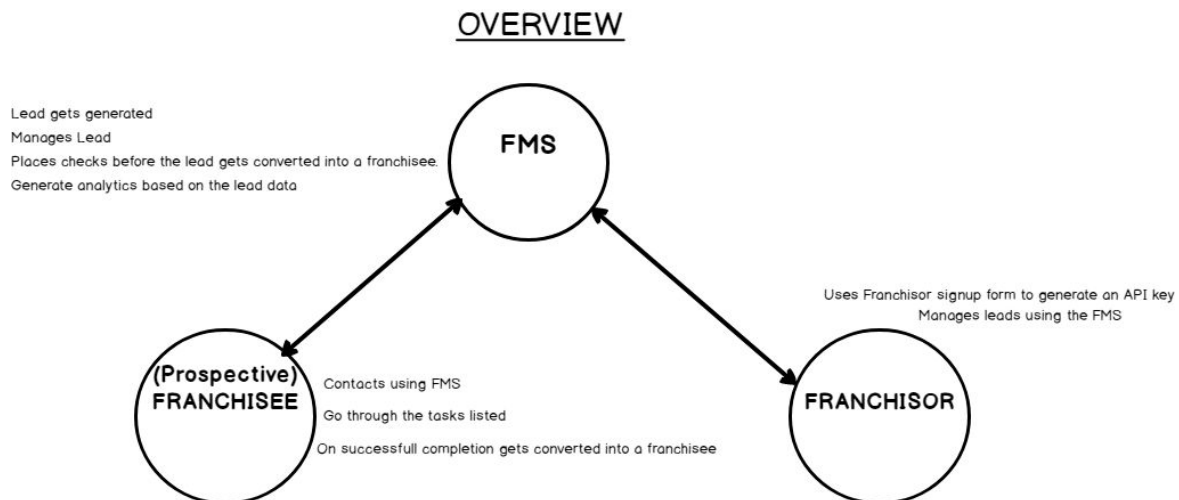
#3 Cathy, the prospective franchise owner

Cathy 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.

#4 Dan, the local pizza shop owner looking to scale his business

Dan is a 25 year old recent graduate living in San Jose. He loves pizza since childhood and decided to start his own pizza shop five years ago near the SJSU campus. During the five years, he built a good reputation and was ranked #2 in the area on Yelp. He often had customers drive for 40-50 miles just to taste his pizza. This popularity also led to him successfully opening 4 more branches spread out in northern California that are currently managed by his cousins. However, now Dan is ready to go mainstream and is prepared for the hyper growth phase of his brand. He is planning to go nationwide, and open 50 more stores in the next 3 years. Since he does not have a formal training to manage franchisees and has a limited understanding of the end-to-end process, he is in the market to use an online tool that can help him manage the whole process, right from receiving applications, to tracking their progress, and finally approving them.

OVERVIEW



DESIGN MOCKUPS

Franchisor Sign up Form

Name of the Organization

Jane Doe Pvt Ltd

Address

San Jose

Contact No

1-900-12322

Email Id

janedoe@example.com

Reset

Submit

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 choosing us .
Please find your unique key
ZVHGVGHVHG6t77.

[Home](#) [Menu](#) [Delivery](#) [Contact 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

Email

Location (City)

Contact No

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

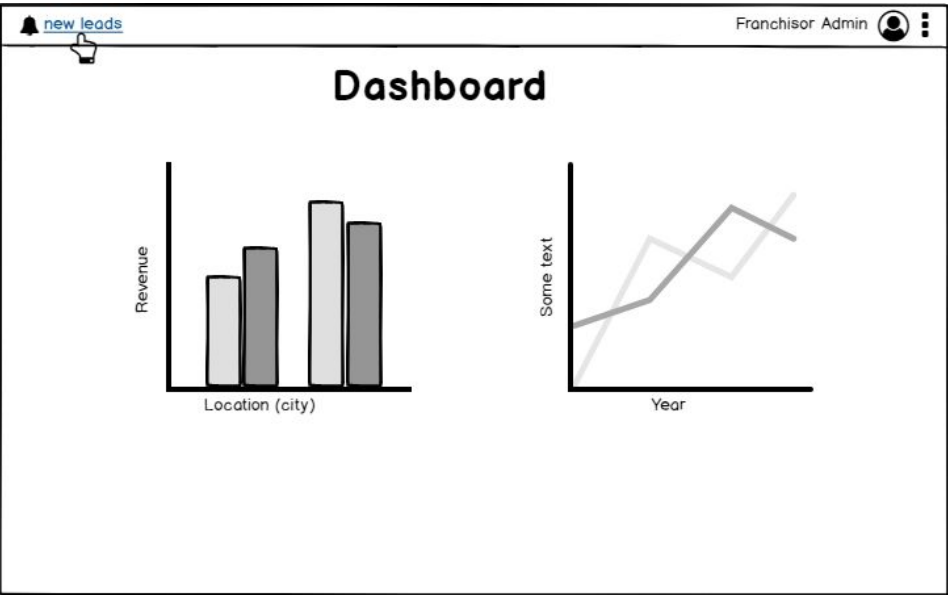
Password

☐ franchisor

☐ franchisee

Login





Tasks List

Task Name

Task Description

Additional Information

+

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

Submit

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Franchisor Admin








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](#)

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.