



# Franchise Management with Owner 360

## A CapTech and Salesforce Solution to Power the Entire Owner Journey

CapTech and Salesforce have created a complete solution that puts the Franchise Owner at the center. Our Owner 360 Franchisee Management Services empower franchisees by placing the application and management process directly in their hands. Combining CapTech's implementation expertise with powerful Salesforce components like Experience Cloud, MuleSoft, and Tableau enables us to deliver a tailored franchise management service that meets your specific needs.

Our franchise management services span three core activities: building franchisee infrastructure, supporting franchisees to execute, and growing operations through reporting and operational change management.

We specialize in facilitating strategic workshops, designing conversion models that ensure a seamless lead-to-franchisee life cycle, and implementing advanced franchise application management systems.

### OWNER 360 IMPACT



#### Enhanced System Efficiency

Integration with back-end systems reduces the need to "swivel-chair" to other systems.



#### Increased Cost Savings

Visibility into billing systems eliminates improper processes, saving millions in lost revenue.



#### Improved Decision-Making

360° visibility with Salesforce reporting and ownership structure management allows for data-driven insights and actions.



#### Enhanced Owner

Provides a fully digital experience by automating application, onboarding, and Franchise Disclosure and Due Diligence processes.

# Owner 360 Features and Functions

## POWER OF THE SALESFORCE PLATFORM



### Sales Process Implementations

Clearly identifies property contacts, tracks potential owner pipeline, and ensures that only vetted individuals proceed.



### Franchise Application

Allows potential owners to complete franchise applications online and provides transparency into application progress.



### Opening/Post-Opening Project Management

Provides internal and owner-facing task management tools for efficient opening and post-opening phases.



### Franchise Disclosure

Uses dynamic workflows to help potential owners complete documents, automatically linking receipts to their Salesforce contact.



### Franchise Application Approvals

Automatically routes approval tasks to stakeholders based on application attributes.



### Dashboards and Insights

Provides insights into property ownership structures, new owner pipeline from vetting through opening, and other key metrics.

## EXPERIENCE CLOUD

### External-Facing Portal for Owners

Franchise owners can easily access and complete next steps.

### Owner Self-Service Workflows

Owners manage updates and tasks independently, reducing administrative delays.

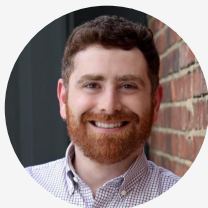
## MULESOFT

### Back-end Billing Integration

Seamlessly integrates with back-end systems to streamline billing.

### Data Cloud

Consolidates data sources for enhanced insights and better decision-making.

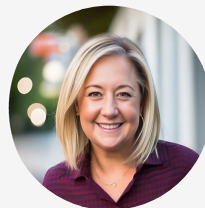


Evan Maxwell

**SENIOR MANAGER – SALESFORCE**

emaxwell@captechconsulting.com

804-314-4372



Christine Misleh

**PRINCIPAL – HOSPITALITY AND TRAVEL**

cmisleh@captechconsulting.com

703-474-8980

Let's do next together.

**CapTech**<sup>®</sup>

[captechconsulting.com](https://captechconsulting.com)

CapTech is a national consulting firm that helps clients grow efficient, successful businesses. We do so by bringing the data, systems, and ingenuity organizations need to stay ahead and transform what's possible in a changing world. Here, we're master builders, creators, and problem solvers who find inspiration in the unknown and enjoy getting our hands dirty as we design solutions for each client. Across industries and business goals, we fuse technical depth and analytical prowess with creative savvy to ignite innovation and move business forward. This drive helps each organization use technology, management, and insight to turn ideas into action. Together, we create outcomes that exceed the expected — which is one of the reasons we've been on the Inc. 500/5000 list for over a decade.

Connect with us   @captech\_consulting

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