



FRANCHISE BUSINESS PLAN

Franchise Business Plan EFB

Sponsored by Southwest Rolling Shutters Company



The **Franchise Business Plan** involves the development of a comprehensive business plan proposal to buy into an existing franchise.

Participants in the Franchise Business Plan will:

- prepare a written proposal for becoming a franchisee
- present the proposal in a role-playing interview

ENTREPRENEURSHIP

EVENT OVERVIEW

- This event consists of two major parts: the **written document** and the **oral presentation**. The written document will account for 100 points, and the oral presentation will account for 100 points for a total of 200 points.
- Each event entry will be composed of **one to three members** of the DECA chapter. All participants must present the project to the judge. All participants must respond to questions.
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Prepared Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- For the presentation, the participants are to assume the role of a potential franchisee. The judge will assume the role of a potential source of capital for the business and will evaluate the presentation, focusing on the content and effectiveness of the presentation technique.

KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills needed to address the components of the project as described in the content outline and evaluation forms.

Participants will also develop Career Competencies, in the following categories, desired by today's employers:

- **Critical Thinking**
Thinks critically to understand and solve problems.
- **Communication**
Communicates clearly, effectively, and with reason.
- **Decision Making**
Considers the impacts of decisions.
- **Collaboration**
Participates and advocates in groups of all sizes to achieve common goals.
- **Innovation**
Demonstrates a creative and innovative mindset.
- **Technology**
Ethically leverages technologies to enhance efficiencies, complete tasks, and accomplish goals.

WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

PREPARED EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY. This must be signed and submitted with the entry. Do **not** include it in the page numbering.

TITLE PAGE. The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

FRANCHISE BUSINESS PLAN

Name of high school

School address

City, State/Province, ZIP/Postal Code

Names of participants

Date

Title page will **not** be numbered.

TABLE OF CONTENTS. The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

BODY OF THE WRITTEN ENTRY. The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered "1" and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

I. EXECUTIVE SUMMARY

One- to three-page summary of the business model. What is the franchise opportunity, and why is it a strong business opportunity? What are the key elements of the plan and the value the business intends to create?

II. BUSINESS HISTORY, BACKGROUND AND OBJECTIVES

What is the franchise company, and what has contributed to its success? What challenges does it face, what are the requirements for franchising, and what short- and long-term objectives will guide the business?

III. BUSINESS ENVIRONMENT

What environmental factors may influence the business? Consider economic, demographic, technological, regulatory, and other market conditions that could impact success.

IV. PRODUCTS AND/OR SERVICES

What products and/or services will the franchise offer, and how do they meet customer needs while supporting the franchise model?

V. PRESENT MARKET

Who are the target customers, what is the growth potential of the market, and how does the business fit within the competitive landscape? How do pricing and seasonal factors influence the business?

VI. COMPETITION

Who are the primary competitors, and what are their strengths and weaknesses? How does the franchise compare, and what advantages or disadvantages may affect its success in the market?

VII. MARKETING PLAN

How is the franchise currently marketed, and what strategies, tools, and techniques will be used to strengthen brand awareness, attract customers, and support future growth?

VIII. MANAGEMENT AND ORGANIZATION

How will the business be managed and staffed to support long-term success? What plans are in place for leadership development, succession, and future personnel needs?

IX. BUSINESS RESOURCES

What resources are needed to operate the business effectively? Consider equipment, suppliers, workforce needs, training, quality control, and other operational requirements necessary to meet customer expectations.



1-3 PARTICIPANTS



20 PAGES
ALLOWED



PRESENT PLAN



15 MINUTES
INTERVIEW TIME

X. FINANCIAL PLAN AND DATA

What do sales and profit trends indicate about the business opportunity? How will capital be obtained, and how do the financial projections demonstrate the business's ability to operate, grow, and remain sustainable? Include a two-year projected operating statement and a one-year projected cash flow statement.

XI. CONCLUSION

Why is this franchise a viable business opportunity? What financing is being requested, and how is that request supported by the analysis and financial projections presented in the plan?

XII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

XIII. APPENDIX

An appendix is optional. Include in the appendix any exhibits appropriate to the written entry but not important enough to include in the body; these might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

PENALTY POINT CHECKLIST

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 60. These standards are designed to make competition as fair as possible.

WRITTEN ENTRY JUDGING

A judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Any visual elements (where allowed) will be evaluated on how clearly and effectively they support the content.

PRESENTATION GUIDELINES

- The participants are to assume the role of a potential franchisee. The judge is to assume the role of a potential source of capital for the business.
- The participants will present the project to the judge in a 15-minute presentation worth 100 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

PRESENTATION JUDGING

The participants are to assume the role of a potential franchisee. You are to assume the role of a potential source of capital for the business..

Participants will make a 15-minute presentation to you.

At the beginning of the presentation (after introductions), the participants will present the proposal. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



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WRITTEN ENTRY EVALUATION FORM

EXECUTIVE SUMMARY	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
1. Clear, concise and well-structured executive summary (one to three pages) covering all key aspects of the project including a rationale for obtaining franchise rights.	0-1-2-3	4-5-6	7-8-9	10	
BUSINESS HISTORY, BACKGROUND & OBJECTIVES	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
2. Explains the company, its goals, and key achievements and challenges, showing an understanding of its position and requirements for franchising.	0-1-2	3-4-5	6-7	8	
BUSINESS ENVIRONMENT	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
3. Explains how environmental factors (such as economic, demographic, technological, and regulatory conditions) may influence the business's performance, showing their impact on success in the selected market.	0-1-2	3-4-5	6-7	8	
PRODUCTS AND/OR SERVICES	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
4. Describes the products and/or services, showing how they meet customer needs and fit within the franchise model.	0-1-2	3-4-5	6-7	8	
PRESENT MARKET	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
5. Analyzes the market, including customer characteristics, growth potential, and pricing, showing how the business fits within the market.	0-1-2	3-4-5	6-7	8	
COMPETITION	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
6. Analyzes competitors, identifying strengths and weaknesses, and explains the franchise's advantages and disadvantages in the market.	0-1-2	3-4-5	6-7	8	
MARKETING PLAN	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
7. Assesses the company's current marketing methods and outlines future strategies and tools to strengthen brand awareness, reach new customers, and support long-term growth.	0-1-2	3-4-5	6-7	8	
MANAGEMENT & ORGANIZATION	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
8. Describes the management team, the plan to strengthen it, the succession plan that ensures continuity, and additional personnel needed to support growth.	0-1-2	3-4-5	6-7	8	
BUSINESS RESOURCES	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
9. Describes the resources needed to operate the business, showing how they support efficient operations and customer needs.	0-1-2	3-4-5	6-7	8	
FINANCIAL PLAN & DATA	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
10. Analyzes sales and profit trends, includes required financial projections (two-year operating statement and one-year cash flow), and outlines a plan to obtain capital, showing how the business can operate and grow.	0-1-2-3	4-5-6	7-8-9	10	
CONCLUSION & FINANCIAL REQUEST	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
11. Synthesizes the business plan by explaining why the franchise is a viable opportunity and presents a clear and justified request for financing.	0-1-2-3	4-5-6	7-8-9	10	
PROFESSIONAL STANDARDS	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
12. Displays a professional layout using appropriate business language and correct grammar.	0-1	2-3	4-5	6	

WRITTEN ENTRY TOTAL POINTS (100)



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PRESENTATION EVALUATION FORM

PRESENTATION CONTENT	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
1. Business Concept & Franchise Fit Explains the franchise concept and how it will operate, showing how it fits the selected market and creates value.	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15	
2. Market Opportunity & Customer Fit Analyzes the target market and customers, showing why there is a clear opportunity and how the business fits within that market.	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15	
3. Competitive Positioning Analyzes competitors and explains how the franchise is positioned in comparison within the market.	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15	
4. Operations & Execution Plan Demonstrates how the business will operate, including resources, staffing, and processes, showing that the plan is realistic and feasible.	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15	
5. Financial Viability & Investment Case Explains how the business will make money, outlines key financial considerations, and presents a clear and justified request for funding.	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15	

PRESENTATION TECHNIQUE	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY	JUDGED SCORE
6. Organization Information is presented in a logical sequence that can be easily followed and understood.	0-1	2-3	4	5	
7. Persuasion Presents a persuasive case that the business plan is worth pursuing, using clear reasoning and a logical structure.	0-1	2-3	4	5	
8. Delivery Presentation engages the audience through interactive techniques (e.g., visual storytelling, etc.).	0-1	2-3	4	5	
9. Presentation Design Visual aids and themes are used throughout and are appropriate, professional, and add value to the presentation.	0-1	2-3	4	5	
10. Overall Impression Demonstrates overall career readiness through professionalism, poise and confidence.	0-1	2-3	4	5	

PRESENTATION TOTAL POINTS (100)	
WRITTEN ENTRY (100)	
PRESENTATION (100)	
SUBTOTAL (200)	
LESS PENALTY POINTS	
TOTAL SCORE	