

## About United Franchise Group

Ray Titus, founder and CEO of United Franchise Group (UFG), built the business on a foundation of meaningful relationships, growing it into one of the most reputable entities in the franchising industry.

UFG is a global franchisor operating 11 leading brands with over 1,800 locations across 80+ countries. With over 40 years in the franchising industry, UFG provides unparalleled leadership and scalable business opportunities for entrepreneurs. Its portfolio includes well-known brands such as Signarama, Graze Craze, and Fully Promoted.



UFG's culture has always placed people first. Partnering with Lumin.ai extended that philosophy: it applied technology not to replace relationships, but to strengthen them at scale.

“ We’re a small and a big company at the same time. We have organizational scale and depth to help our franchisees find a solid path to success. But we’ve never lost the closeness you’d find in a small, family-run business. ”

Michael White  
Chief Development Officer

## Opportunity

Casey Matthews, Director of Franchise Development, saw a powerful opportunity to enhance the prospect experience while boosting performance across the board by improving three key areas:

- ▶ **Ensure prompt and consistent communication:** He sought to deliver a cohesive, professional prospect experience by responding to prospects quickly and with consistent messaging any time they were ready to engage.
- ▶ **Maximize time for relationship building:** Casey wanted Franchise Development (FD) Managers to shift their focus from chasing inquiries to conducting meaningful conversations with qualified candidates.
- ▶ **Achieve seamless omni-channel coordination:** UFG’s development staff were already effective at following up with prospects via phone whenever their busy schedules allowed. Casey aimed to provide prospects with a coordinated experience across phone, email, and text.

“ We’ve refined our development process for 40 years and know what it takes to create a meaningful mutual fit. ”

We wanted to expand our efforts to meet candidates where they are, at a time that’s right for their exploration. ”

Casey Matthews  
Director, Franchise Development

Determined to unlock growth and deliver a more seamless prospect journey, Casey and Taylor took the initiative to tackle these challenges head on.



*Lumin.ai engages prospects instantly, stays responsive 24/7, and books appointments seamlessly.*

## The Solution

UFG used Lumin.ai to automate AI-based text follow-up for every real-time inquiry, across multiple brands and development teams. Crucially for a coordinated prospect experience, Lumin.ai integrated with UFG's CRM system bidirectionally and in real time.

### Prospect Experience

Prospects request information at varying stages of readiness to engage, and with diverse priorities. Lumin.ai gives them control over when to book time. It initially engages, then schedules, and finally nurtures until a first direct contact with UFG is made.

- ▶ **Engagement:** A prospect who requests information immediately receives a text from UFG via Lumin.ai, with prompt automated responses whenever a prospect is ready to engage.
- ▶ **Scheduling:** Upon finding a mutually agreeable time, the prospect receives a calendar invite directly from the developer's calendar.
- ▶ **Omnichannel coordination:** Whether a prospect uses text, email, or voice to schedule, opt out, or qualify/disqualify, the experience is fully coordinated across all three channels.

### Development Team Experience

Franchise Development Managers at UFG use their CRM to view and track the progress of each prospect, just as they did prior to the introduction of Lumin.ai. Casey remarked that "We haven't had to change our development process, which has been refined and optimized over the years."

- ▶ **Real-time visibility:** As Lumin.ai converses with candidates at scale, it automatically updates statuses and notes in the CRM, often while a developer is away from work or busy in a productive call.
- ▶ **Real-time responsiveness:** As the developer makes progress via voice and email communications with a prospect, updating the CRM status is enough to cause Lumin.ai to adjust its behavior accordingly.
- ▶ **Automatic calendar management:** Lumin.ai monitors the calendar in real time, recognizing when Calendly has made an appointment, and tracing its association with the prospect, even across brands. Developers simply show up to scheduled meetings.

*"We want our prospects to know we care, and that we work together as a tight-knit team."*

*"That was hard to do with our previous AI-based texting service, because it didn't coordinate well with our voice and email efforts. It operated as a silo separate from our CRM system and the team."*

**Taylor McCarley**  
**Marketing Manager**

# Results

UFG experienced immediate, measurable, portfolio-wide impact after implementing Lumin.ai, all while strengthening their people-first culture.

## Speed to Book

Lumin.ai enabled UFG to engage with thousands of prospects across every brand, ensuring that each individual received a prompt, helpful response the moment they expressed interest.

Median time to book dropped to just **14 minutes**.



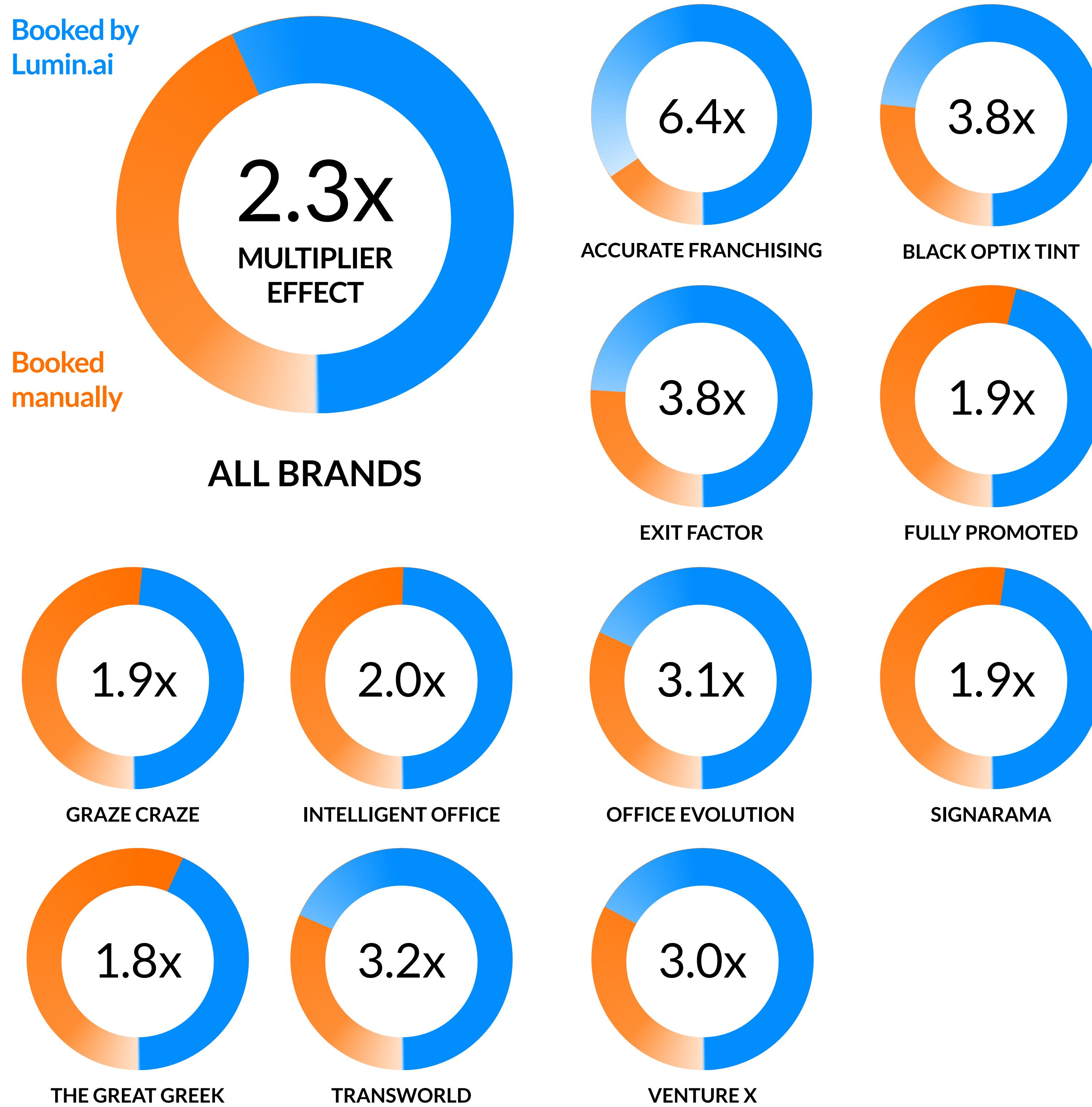
Our team never worried about this AI replacing jobs. It's been the opposite. Because prospects are raising their hands when they're most ready to talk, we've actually been able to give more responsibility to our FD Managers.



**Casey Matthews**  
*Director, Franchise Development*

## Speed to Franchise Awarded

Prospects were empowered to schedule when they felt ready, and because UFG trusted each prospect's own timing, those prospects rewarded them with a **52-day median time from inquiry to franchise awarded**.



Prospects booked 2.3 appointments for every 1 booked manually.

## Conclusion

By partnering with Lumin.ai, UFG achieved the best advantages of 24/7 automation, while leaning into their signature people-first culture and adaptability, and empowering their team to focus on what they do best.

UFG successfully scaled these advantages to all of the brands that it operates, exercising a winning formula that's unique to a multi-brand franchisor: optimize once and reap the benefits across the entire portfolio.



Our purpose has always been to empower people to become successful entrepreneurs, enhancing their lives and the communities around them. Partnering with Lumin.ai has made that journey even more accessible.



**Michael White**  
*Chief Development Officer*