

How to Write a Franchise Operations Manual

A practical structure for turning know-how into repeatable standards

A franchise operations manual should make the business easier to run, easier to teach and easier to improve. It should translate the brand's operating knowledge into clear standards without becoming a 300-page document nobody uses.

Built for	Emerging franchisors, operations leaders and teams formalizing franchise standards
Format	Practical, non-technical, franchisee-aware
Edition	2026 Edition

A practical point of view

Franchising is not just a legal structure or a sales model. It is the discipline of making a business repeatable, supportable and measurable for another owner.

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Know what the manual is supposed to do

It is an operating tool, not a document archive

The manual sits between the franchise agreement and the day-to-day reality of running a location. It should tell a franchisee what the operating standard is, why it matters, who owns it and how to perform the work.

FRANCHISEE-FIRST LENS

A useful manual reduces uncertainty. The franchisee should be able to find the answer quickly, understand what is mandatory, know where local judgment is allowed and see where to go for help.

A good manual is:

- Structured around the way the franchisee actually operates the business.
- Specific enough to create consistency, but not so rigid that every sentence becomes obsolete.
- Clear about mandatory standards versus recommended practices.
- Owned by named functions and reviewed on a defined cadence.
- Connected to training, onboarding, assessments and support instead of living as a standalone PDF.

A bad manual is usually one of two things: a legal document rewritten in operational language, or a giant collection of SOPs with no hierarchy.

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Use a simple architecture

The downloadable framework

Manual section	What to cover
1. Brand & operating principles	Brand promise, non-negotiables, decision principles, how the manual is used
2. Roles & responsibilities	Franchisor, franchisee, manager, employee, support contacts, escalation ownership
3. Pre-opening & launch	Entity setup, site/real estate, permits, buildout, vendors, technology, hiring, training, marketing, opening readiness
4. Daily operations	Opening/closing routines, service delivery, customer experience, cash handling, scheduling, maintenance
5. People & training	Hiring standards, onboarding, role training, certifications, performance expectations
6. Product / service standards	Quality standards, approved methods, presentation, service levels, exception handling
7. Safety, risk & compliance	Health/safety, incident reporting, privacy/data handling, required local procedures
8. Vendors, inventory & purchasing	Approved suppliers, ordering, substitutions, receiving, inventory controls
9. Marketing & brand use	Approved assets, local marketing rules, promotions, social media, co-op/fund rules if applicable

Manual section	What to cover
10. Financial & reporting obligations	Required sales reporting, royalty support, records, deadlines, documentation
11. Technology & data	Required systems, user access, security, data ownership, support process
12. Support, assessments & continuous improvement	How to get help, visits/assessments, corrective actions, updates and version control

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Write each section with the same operating pattern

Consistency makes the manual easier to use

Element	Question to answer
Purpose	What outcome is this standard trying to protect?
Standard	What must be true at every location?
Procedure	What are the key steps, in sequence?
Owner	Who is responsible for execution and who approves exceptions?
Evidence	What record, checklist, photo, report or system status proves completion?
Exceptions	What can vary locally, and who must approve a deviation?
Related training	What course, resource or coaching supports the standard?
Review date	When was this section last reviewed and who owns the next review?

WRITING RULE

Use one sentence for the standard before giving the procedure. Franchisees need to know the outcome, not just the clicks or steps.

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Separate standards from procedures

This prevents the manual from aging too quickly

A standard is relatively stable: 'Every new employee completes required training before working independently.' A procedure changes more often: which learning module, form, system screen or approval step is used.

Where possible, keep the manual focused on standards and operating logic, then link detailed SOPs, videos, forms and training as supporting resources.

Keep in the manual	Link or reference
Brand standards and required outcomes	Screen-by-screen system instructions
Roles, ownership and approval logic	Frequently changing forms
Required controls and evidence	Vendor-specific setup steps
Operating sequences and decision gates	Training videos and micro-learning
Escalation and exception rules	Temporary campaign instructions

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Build the manual with the people who run the work

Do not outsource operational truth

1. Map the franchisee lifecycle from award through opening and active operations.
2. Interview the people who currently own each operating function.
3. Identify the steps that are truly non-negotiable and the evidence that proves them.
4. Draft one section at a time using the same template.
5. Test the section with someone who did not write it.
6. Convert repeated questions into clearer manual language, training or system guidance.
7. Review the draft with qualified franchise counsel so operational language does not conflict with agreements or applicable requirements.
8. Publish with version control, owners and a review schedule.

DO NOT CONFUSE DETAIL WITH QUALITY

The best operations manual is not the longest. It is the one franchisees actually use and the franchisor can maintain.

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Use this editable manual build tracker

A simple governance table

Section	Owner	Status	Review cadence	Last updated
Brand & operating principles	Corporate / Brand	Draft / Review / Approved	Quarterly / Annual	
Pre-opening & launch	Operations	Draft / Review / Approved	Quarterly	
Daily operations	Operations	Draft / Review / Approved	Quarterly	
People & training	Training / HR	Draft / Review / Approved	Quarterly	
Safety & compliance	Ops / Legal	Draft / Review / Approved	Quarterly	

Section	Owner	Status	Review cadence	Last updated
Marketing & brand use	Marketing	Draft / Review / Approved	Quarterly	
Financial & reporting	Finance	Draft / Review / Approved	Quarterly	
Technology & data	IT / Ops	Draft / Review / Approved	Quarterly	
Support & assessments	Operations / FBC	Draft / Review / Approved	Quarterly	

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Connect the manual to the operating rhythm

The manual should show up in real work

The manual becomes much more valuable when it is tied to the workflows that franchisees already touch.

- Onboarding: checklist items reference the relevant standard or training.
- Training: courses teach the manual, not a separate version of the business.
- Assessments: questions measure the same standards the manual defines.
- Support: recurring tickets identify unclear standards or missing instructions.
- Communications: changes are announced, dated and linked back to the updated section.
- Marketing: only current approved assets are available for franchisees to use.
- Reporting: financial and operational obligations match the published standard.

GOVERNANCE RULE

One operating standard should have one owner and one current version. Multiple PDFs, email attachments and local copies create silent inconsistency.

THE HOLA TEAMS VIEW

Turn the manual into a living part of franchise operations

As a franchise system grows, sales, onboarding, location records, training, support, assessments, royalties, communications and reporting stop behaving like separate departments. They become one operating chain. When those handoffs live in inboxes, spreadsheets and disconnected tools, franchisees feel the friction first.

WHAT CONNECTED OPERATIONS SHOULD DO

Give the franchisor one reliable operating model while giving each franchisee the right tasks, information, resources and support for their location.

HolaTeams is built around that connected model. It brings the franchise journey into one Microsoft-based operating layer so teams can manage the network without adding the same amount of manual coordination as locations multiply.

Operating area	What good looks like
Franchise sales	Lead, qualification, opportunity, agreement and payment handoff
Opening	Standard checklists, owners, due dates and readiness
Operations	Location records, ownership, lifecycle and searchable network data
Quality & support	Assessments, corrective actions and ticket resolution

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Educational guide only; not legal, accounting or tax advice. Franchise laws and requirements vary by jurisdiction; consult qualified advisers.