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A PLAYBOOK FOR FRANCHISE & DEALER NETWORKS

One program, every territory.

How franchise and dealer networks find the right customers in each market, coordinate mail and digital, and measure what actually works.

Written for
Corporate marketing leaders and the agencies that support them

Inside
Eight working tools, a 90-day pilot plan, and a readiness assessment

ABOUT THIS GUIDE

A working playbook for winning new customers across every location.

Who it's for

Corporate marketing leaders responsible for customer acquisition across franchise systems, dealer networks, and other multi-location brands, and the agencies that run programs on their behalf. It assumes you know marketing. It focuses on the operating problems that make network-wide acquisition hard.

What it covers

Winning new customers for the locations you already have. It is **not** about recruiting new franchisees or dealers.

How to use it

Chapter 1 frames the problem. Chapters 2–7 are the playbook. Chapters 8–9 help you plan a pilot. Every tool is built to be printed, shared, or pasted into a planning deck.

A NOTE ON EVIDENCE

Statistics are cited on the page and listed in the References. Frameworks, scenarios, and dashboard figures are original and illustrative; look for the ILLUSTRATIVE label. They are not industry benchmarks or client results.

WHAT'S INSIDE

Eight working tools

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Plus: twelve questions to ask before investing in a new marketing platform **p.23**

Teach first

Every chapter stands on its own, whatever platform you use.

Built for both models

Franchise and dealer differences are called out where they change the advice.

Made to share

Tools are designed for your team, your agencies, and your location owners.

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THE SHORT VERSION

Most networks don't have a creative problem. They have a coordination problem.

A corporate program is planned once, then rebuilt dozens of times by locations, agencies, and separate tools, until no one can say what ran, to whom, or what it produced.

1 · Build the program once

Set audience method, offer, creative, channel roles, and measures centrally. Decide in advance what each location may change.

2 · One method, every territory

Start from your best customers, model similar prospects, fit each service area, and exclude current customers.

3 · Signals change timing, not standards

Buying signals can decide who hears from you first. They don't replace a qualified audience or a fair test.

4 · Run channels from one plan

One audience, one offer, one calendar across mail, email, and digital, with each channel given a defined job.

5 · Three levels, three kinds of evidence

Report by location, region, and network. Keep reporting, attribution, and incremental impact separate.

6 · Prove it small, then scale

A pilot with defined locations, agreed-upon measures, and a comparison group beats a network-wide launch.

CH. 01
The problem
Why network acquisition breaks

CH. 02–07
The playbook
Audience, signals, channels, measurement, operations

CH. 08–09
The plan
A 90-day pilot and a readiness score

CH. 10
The next step
Questions to ask any platform

CHAPTER 01

The network growth challenge

A corporate program is planned once and rebuilt many times. That is where acquisition gets expensive, inconsistent, and hard to evaluate.

Growing a brand through hundreds of independently operated locations is a different job from marketing a single business at scale.

Corporate owns the brand, the national budget, and the outcomes the board watches. Each location owns a market, a set of customer relationships, and often its own budget and agency. Customer acquisition sits across that line.

Much of the money behind it is spent locally, by different people, on different plans.

~845,000

U.S. franchise establishments projected for 2026

- IFA / FRANdata, 2026 Franchising Economic Outlook[1]

$586,246

Average 2025 advertising spend per franchised new-car dealership (16,997 dealers)

- NADA Data 2025[2]

Where the program breaks

In most networks, a corporate campaign follows a familiar path. Corporate defines the offer and the creative. Locations, or the agencies that serve them, rebuild the audience their own way, shift dates, add channels, and report in their own format. By the time results reach corporate, they arrive in pieces: mail data from one vendor, digital from another, location sales assembled by hand.

Audiences are built differently in every market

The same program reaches very different people depending on who pulled the list.

Channels run on separate calendars

A prospect may get a mailer with one offer and a digital ad with another, or nothing at all when it matters.

Vendors multiply

Most franchise sectors work with two or three digital marketing companies; 40% of systems with 101–1,000 units work with four or five.[3]

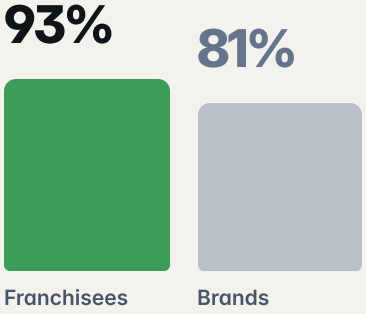
Results can't be compared

Without shared definitions, corporate can't tell a strong market from a strong program, or either from chance.

WHAT THE RESEARCH SHOWS

Locations feel the gap more sharply than headquarters does.

CALL LOCAL MARKETING CRITICAL TO THEIR SUCCESS



Only about **one in five** organizations runs a true hybrid model of central strategy and local execution.

- Uberall and Dialog, survey of 352 U.S. franchise brands and franchisees, 2026[4]

48% of franchisors leave franchisees to track and manage local marketing on their own, though **85%** recommend or require local investment.

- Franchise Update Media, 2025 AFMR[5]

37% of franchisors name balancing corporate control with local customization as a top hurdle. **30%** of franchisees cite a lack of localized support.

- Constant Contact and Ascend2, 2025[6]

Budgets aren't growing to absorb the waste. Gartner's 2025 CMO Spend Survey found marketing budgets flat at 7.7% of company revenue, with 59% of CMOs saying they lack the budget to execute their strategy.[7] For network marketers, the most accessible source of growth is often money already being spent, coordinated better.

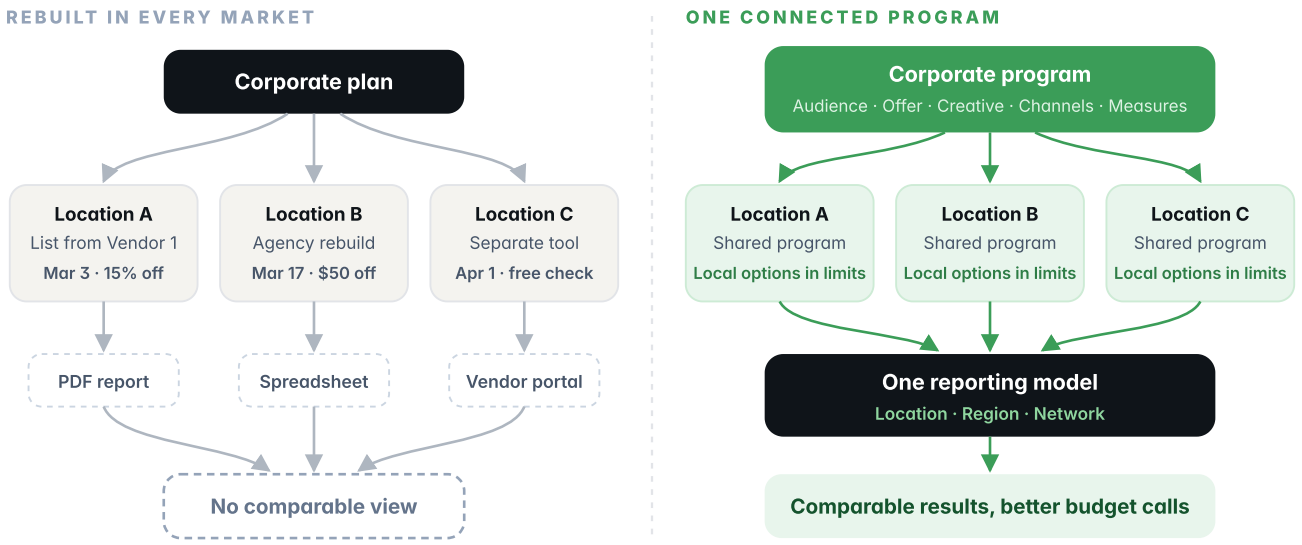


Figure 1. The same campaign, two operating models. On the left, every market rebuilds the program and reports its own way. On the right, one program is shared to location spaces, adjusted within agreed-upon limits, and reported one way. ILLUSTRATIVE

SAME PROBLEM, DIFFERENT RULES

Franchise systems and dealer networks share the coordination problem. They don't share the levers.

Before applying any framework in this guide, map it to your network's legal and commercial structure. These are the differences that most often change the advice.

	FRANCHISE SYSTEMS	DEALER NETWORKS
Relationship	The licensee operates under the franchisor's brand and system. U.S. law defines a franchise by trademark, significant control or assistance, and required payment.[8]	Independent businesses authorized to sell and service a manufacturer's products under dealer agreements. Many carry several brands. Auto dealers are often called "franchised," but those relationships are shaped largely by dealer agreements and state dealer laws.
Marketing funding	Brand or advertising fund paid by franchisees, most commonly 1–2% of revenue; some systems add local or co-op funds.[9] Terms are disclosed in the Franchise Disclosure Document.	Co-op accruals or market development funds that reimburse eligible local advertising, plus each dealer's own budget.
Corporate authority	Can often require participation and brand standards through the franchise agreement.	Influences through program rules, co-op eligibility, and incentives. Participation is usually voluntary.
Customer data	Often in shared POS or CRM systems; corporate access set by the agreement.	Usually held in each dealer's own systems; manufacturer access depends on dealer agreements and reporting.
Territory	Defined or protected territories are common.	Areas of responsibility; neighboring dealers may compete for the same customer.
Rules to respect	Franchise agreement and disclosure obligations.	Co-op program terms. Promotional allowances should be available to competing dealers on proportionally equal terms.[10]

WHAT THIS MEANS

A franchisor can often build a program and require its use. A manufacturer usually has to build a program dealers *choose* to use. Design for adoption accordingly.

THROUGHOUT THIS GUIDE

Where the advice differs, look for **franchise** and **dealer** notes. Every example scenario is labeled by network type: home services, hearing care, or a manufacturer's dealer network.

Summary for planning purposes only; not legal advice. Agreements, state laws, and program terms vary.

CHAPTER 02

Centralized strategy, localized execution

Decide once what stays consistent, what can flex, and what belongs to the location. Then build the program around those decisions.

The debate between brand control and local flexibility stalls because it's framed as a choice. It isn't one. Effective networks separate a program into layers and assign each layer an owner before launch.

Corporate is best placed to own what benefits from scale and consistency. Locations are best placed to own what depends on market knowledge: timing, capacity, community relevance, and follow-up with the people who respond. Agencies, corporate or local, typically execute in between.

Locked

Set by corporate · same everywhere

- Audience method and model logic
- Suppression rules: current customers, do-not-contact, recent responders
- Brand creative and legal copy
- Measurement definitions and reporting format
- Data-use and consent rules

Flexible

Chosen locally from approved options

- Offer variant from an approved range
- Launch window within the program calendar
- Quantity or budget tier
- Local image or message module
- Which supported digital channel to add

Local

Owned by the location

- Service-area boundaries and capacity
- Local events and partnerships
- Call handling and appointment follow-up
- Reviews and community presence

Figure 2. The three-layer program. Every element has one owner before launch.

"Approved options" means a menu, not a blank page

A home services brand might offer three seasonal offers, two budget tiers, and a set of approved local modules. Each location's choices are recorded, so results can later be compared by option as well as by market.

Treat the program as a kit

A shared program should travel as one package. When a location or its agency activates it, the locked elements come with it. That is what stops a network program from being rebuilt 300 times, and what makes results comparable.

THE PROGRAM KIT TRAVELS AS ONE PACKAGE

- Audience logic
- Brand creative
- Channel plan
- Measurement plan
- Timing rules
- Budget tiers
- Local modules

SIGNS YOUR MODEL NEEDS THIS

- The same campaign launches on three dates in neighboring markets.
- Each agency maintains its own suppression list.
- Corporate learns what ran from invoices.

TOOL 1 Corporate-vs-local responsibility matrix

PROGRAM ELEMENT	CORPORATE MARKETING	LOCATION (FRANCHISEE OR DEALER)	AGENCY	LOCALLY ADJUSTABLE?
Acquisition objectives and target outcomes	●	◐	○	Locked
Audience method (seed, model, exclusions)	●	○	◐	Locked
Service area or territory boundaries	◐	●	○	Local, within agreement
Offer architecture	●	◐	○	Flexible: approved range
Brand creative and compliance copy	●	○	◐	Locked
Local message modules	◐	●	◐	Flexible: approved modules
Channel roles and sequencing	●	◐	◐	Locked
Launch window and quantities	◐	●	◐	Flexible
Media buying and production	○	○	●	Per agreement
Response handling and follow-up	○	●	◐	Local
Outcome data (appointments, sales)	◐	●	○	Definitions locked
Reporting and measurement design	●	◐	◐	Locked
Data use, consent, and retention rules	●	◐	◐	Locked

● Owns the decision ◐ Contributes or executes ○ Informed

How to use it. Complete the matrix with your agencies and a small group of location owners before you build anything. A disagreement surfaced here costs far less than one surfaced after launch. In dealer networks, read "Owns" as "Recommends" wherever the manufacturer cannot require adoption.

CHAPTER 03

Finding the right customers in every territory

One audience method, applied territory by territory, beats one list applied everywhere.

A network acquisition program is only as strong as the audience each territory receives.

A list built the same way for every market ignores what separates a likely customer in Phoenix from one in Pittsburgh. A list built differently by every location ignores what the network has already learned. The answer is a consistent method that produces a different audience in each market.

01 · SEED

Start from your best customers

Define "valuable" for this program: lifetime value, completed jobs, repeat purchase, plan enrollment.

02 · MODEL

Find prospects who resemble them

Score the market on permitted demographic, household, property, and geographic attributes.

03 · FIT

Apply each territory

Clip to the service area, drive time, or area of responsibility. Size to capacity and budget tier.

04 · EXCLUDE

Remove who shouldn't hear from you

Current customers, recent responders, open opportunities, do-not-contact, and policy exclusions.

05 · RANK & TEST

Prioritize, then prove it

Contact the top-ranked households and test against your current selection, same offer and creative.



Figure 3. The five-step audience method, and what it does to one territory's numbers.

Data quality beats model sophistication

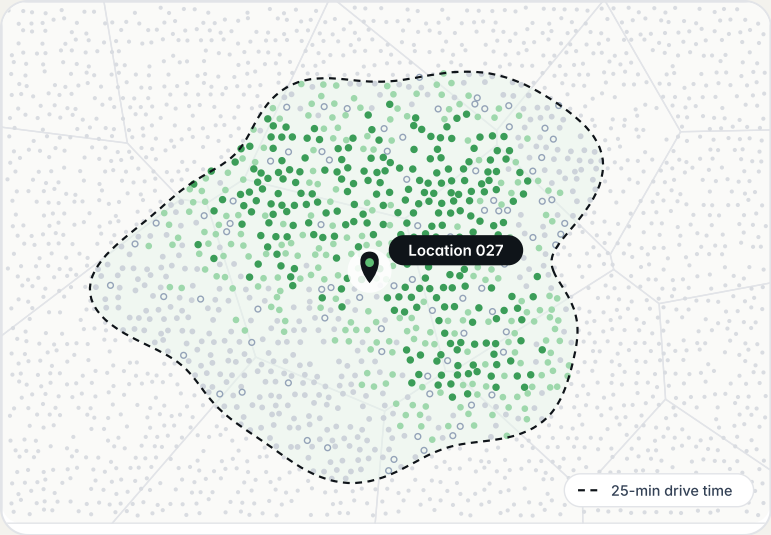
Before modeling, reconcile duplicate customer records across locations, standardize addresses, and agree on which outcomes count. If two locations record a "customer" differently, your model learns two different things.

TOOL 2

Sample territory audience strategy

ILLUSTRATIVE · HOME SERVICES A residential HVAC franchise with 140 locations wants more system-replacement customers, not more one-off repair calls. Location 027 serves a suburban territory of about 61,000 households.

STEP	DECISION FOR LOCATION 027
Seed	Customers with a completed system replacement in the last 36 months (about 1,150), not all service calls
Model	Lookalike score using home age, home value, ownership, household composition, and distance; refreshed quarterly
Fit	Territory ZIP codes within a 25-minute drive of the shop; sized to about 45 installs a month
Exclude	Service-plan members, jobs in the last 24 months, open quotes, do-not-mail records, and renters (for this offer)
Rank	About 41,000 eligible households remain; the top three deciles hold about 12,300; the budget tier selects the top 6,000
Test	Hold out 10% of the selected households (about 600) at random as a control; mail the other 5,400 and compare against last year's list with the same offer and creative
Measure	Booked replacement estimates and installed jobs within 90 days, matched by household



Top 3 deciles · Deciles 4–6 · Deciles 7–10 · Excluded

Figure 4. Conceptual territory audience map. ILLUSTRATIVE

ADAPT IT: HEARING CARE

Seed from customers who completed a fitting, without using diagnostic detail. Model on permitted age-band, household, and geographic attributes, fit each clinic's drive time, and exclude current patients. Consideration can take longer, so set a longer outcome window.

ADAPT IT: DEALER NETWORK

An outdoor power equipment or powersports manufacturer can build one model network-wide from registered owners, then fit each dealer's area of responsibility. Where areas overlap, agree on the assignment rule up front so dealers trust the program.

Handle sensitive categories with care

Hearing care, dental, vision, and medical aesthetics carry stricter rules. Treat any data that reveals or implies a health condition as sensitive. Most U.S. states with comprehensive privacy laws require affirmative consent before sensitive personal information is collected or used,[11] and Washington's My Health My Data Act extends protection to health inferences drawn from non-health data.[12] Model on permitted non-health attributes, don't use patient or condition data for prospecting without a clear legal basis, and have counsel review audience rules before launch.

CHAPTER 04

Moving beyond scheduled campaigns

Calendars decide when you're ready to market. Signals help show when a customer may be ready to buy.

Most network programs run on a calendar: spring tune-up, fall maintenance, a year-end sales event.

Calendars make production, budgets, and staffing predictable. But some of the best moments to reach a prospect fall between scheduled drops: when a household starts researching a replacement, moves into an older home, or reaches the point in an ownership cycle where the need tends to arise.

Buying signals help locations act while that interest is current. Used well, they change priority and timing. Used badly, they create noise, unnecessary contact, and claims nobody can support.

Four kinds of signals

Shopping and research intent

Online research activity in a category, from permitted third-party sources.

Example: a household comparing heat-pump options

Life and property events

Moves, home purchases, and renovations.

Example: a household that recently bought a 25-year-old home

Ownership-cycle signals

Equipment or vehicle age, or time since last service, from your own records.

Example: a furnace installed 14 years ago; a lease nearing maturity

Engagement signals

Responses to your own channels and follow-up.

Example: a quote-page visit, or an estimate not yet accepted

> **Intent is a signal to evaluate, not a guarantee of purchase.**

WHAT TO AVOID

Treating signal volume as success. Contacting one household from several locations. Using a signal you couldn't explain to a franchisee, a dealer, or a regulator.

FOUR RULES FOR ACTING ON SIGNALS

1 · Apply signals inside a qualified audience

A household outside the territory or far from your customer profile is still a weak prospect. Signals sharpen an audience; they don't replace it.

2 · Define the response in advance

Agree on which signals trigger local action, through which channels, with which offer, and how often a household may be contacted.

3 · Respect data permissions by category

Check how each signal was collected and whether its use is permitted in your category and states, especially in health-related services.

4 · Test the difference

Compare a signal-prioritized group with your standard selection, using the same offer and creative, before you scale.

TOOL 3 Signal test design

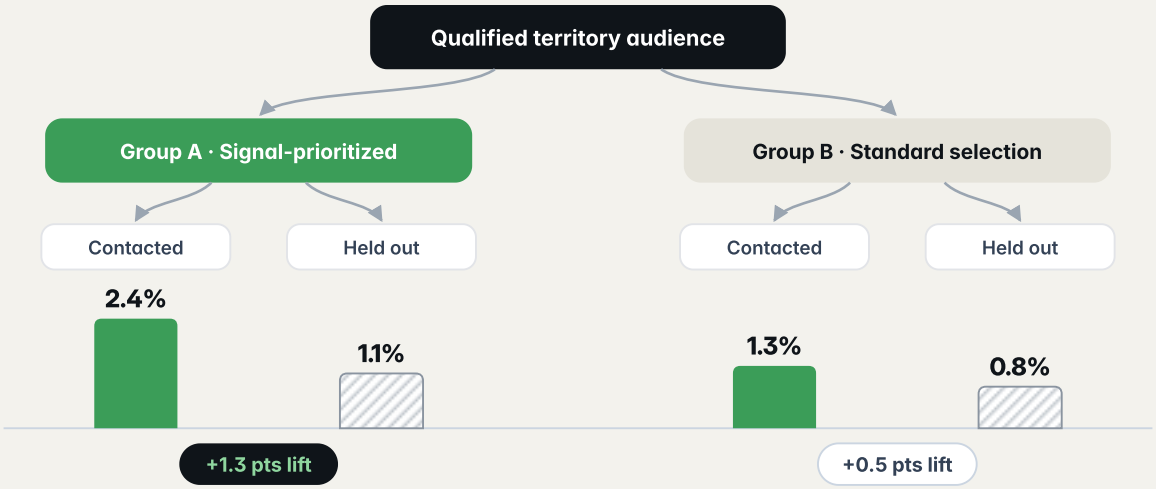


Figure 5. A two-question test. Signal-prioritized households booked at a higher rate and showed more lift over their held-out control. ILLUSTRATIVE FIGURES

1. **Start small and specific.** One program and 5–10 locations with enough volume to read results.
2. **Build each qualified audience as usual.**
3. **Split it.** Group A has a qualifying signal; Group B is the standard selection. Within each, hold out a random control that receives no contact.
4. **Keep everything else equal:** offer, creative, channels, timing.
5. **Measure the outcome that matters**, such as booked appointments or sales, not clicks, in one matching window.
6. **Read it as two questions.** Did signal households respond more than standard ones? Did contacted households beat their controls?

READING THE ILLUSTRATIVE RESULT

Group A booked 2.4% vs. 1.1% held out (+1.3 points). Group B booked 1.3% vs. 0.8% (+0.5 points). The signal group responded more *and* showed more incremental impact, so signal prioritization earns a larger test, not an automatic rollout.

MIND THE SAMPLE SIZE

Small differences need large groups. If a territory can't produce enough outcomes to read a result, pool similar territories or extend the window rather than calling a winner early.

CHAPTER 05

Connecting direct mail, email, and digital

The channels don't need to be merged. They need to work from the same audience, the same offer, and the same calendar.

For many franchise and dealer brands, direct mail remains a core acquisition channel, especially where the household, not the device, makes the decision.

But when mail, email, and digital are planned by different teams on different calendars, a prospect can get a mailer with one offer, an email with another, and a social ad for a promotion that ended last week. Coordination starts with one audience, one offer, and one calendar. Each channel then gets a defined job.

INTRODUCE

Direct mail

Reaches the household at its address and carries the full offer and local proof. Best for new prospects and high-consideration services.

REINFORCE AND FOLLOW UP

Email

Reminders and appointment prompts for customers and opted-in prospects. Send only with appropriate permission.

REINFORCE IN THE IN-HOME WINDOW

Paid social and display

Reach the share of the mailed audience you can match to digital audiences. Match rates vary by data and platform.

CAPTURE

Search and local listings

Catch the demand the program creates. Local pages and listings should carry the same offer.

BUILD FAMILIARITY

Streaming TV, where supported

Usually corporate-funded and most useful in larger markets.

CONVERT

Location staff and call center

Scripts and offer codes that recognize the campaign when the prospect calls or walks in.

The consistency test

Someone who sees a location's offer in the mail should recognize it in their inbox or online, and find the same next step.

THREE PHASES OF A COORDINATED PROGRAM

Before launch

Agree on one audience, one offer, and each channel's role. Apply location-level exclusions. Set up offer codes, tracking numbers, and landing pages.

During the in-home window

Reinforce the mail piece through email, social, or display for the audience you can match. Keep offer and creative recognizably the same.

After response

Use outcome data by location to guide follow-up, update suppression lists, and stop marketing to people who have already converted.

TOOL 4 Omnichannel campaign planning template

PROGRAM BASICS

PROGRAM NAME	PRIMARY OUTCOME	LOCATIONS IN SCOPE	IN-HOME WINDOW	BUDGET TIERS

AUDIENCE

SEED DEFINITION	MODEL & REFRESH	TERRITORY RULE	EXCLUSIONS	HOLDOUT %

OFFER AND CREATIVE

CORE OFFER	APPROVED LOCAL VARIANTS	EXPIRY	OFFER CODE / TRACKING NO.	LANDING PAGE

CHANNEL PLAN

CHANNEL	ROLE	AUDIENCE PORTION	TIMING VS. IN-HOME	OWNER	MEASURE
Direct mail	Introduce	Full mailable audience	Week 0		
Email	Reinforce / follow up	Opted-in contacts			
Paid social	Reinforce	Matched portion			
Display	Reinforce	Matched portion			
Search and listings	Capture	Market			
Calls and follow-up	Convert	Responders			

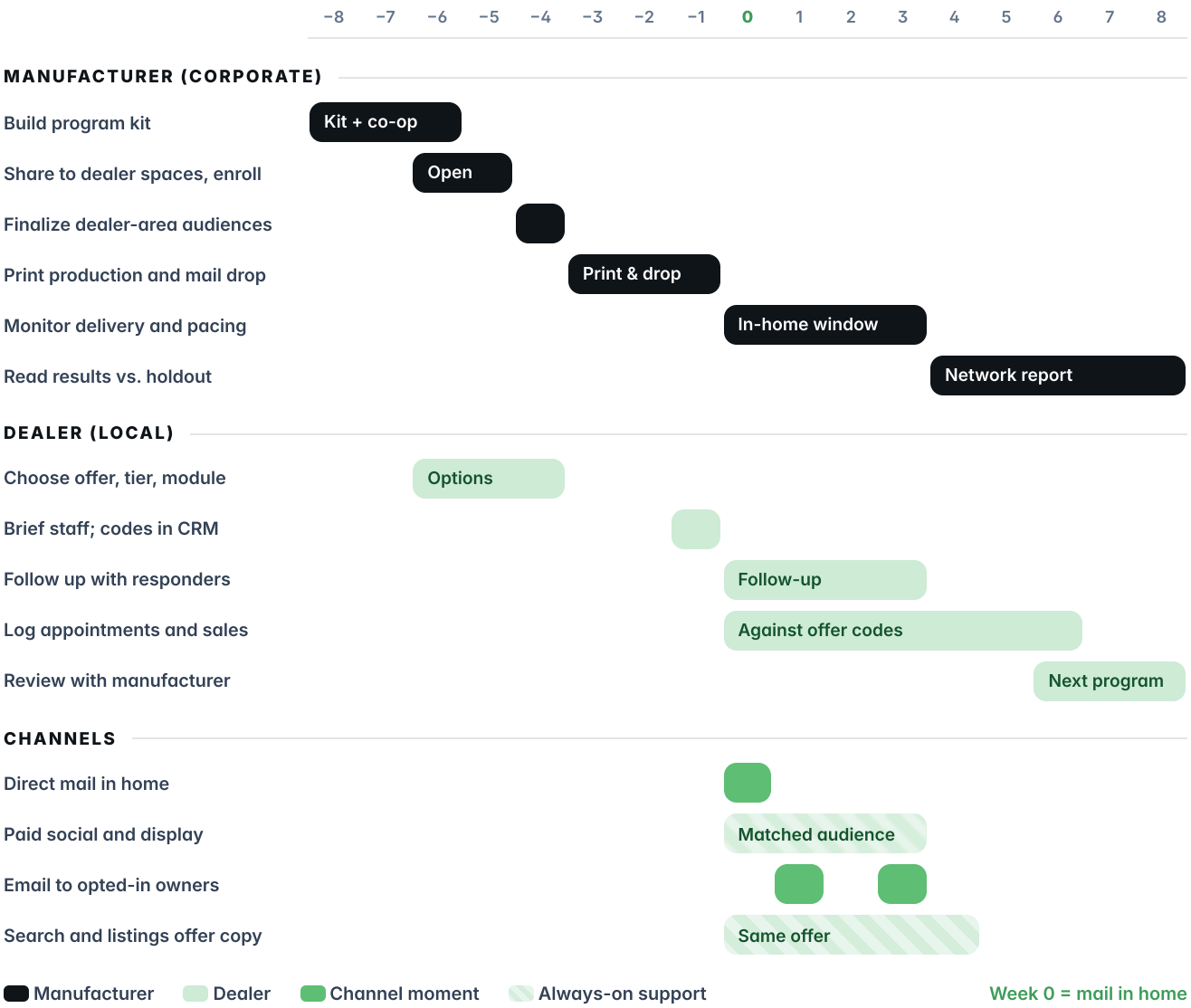
MEASUREMENT

PRIMARY OUTCOME	MATCHING WINDOW	COMPARISON METHOD	REPORTING CADENCE	DECISION DATE

TOOL 5

Coordinated campaign timeline

ILLUSTRATIVE · DEALER NETWORK An outdoor power equipment manufacturer runs a spring sales event across 60 participating dealers. The manufacturer plans and funds the program; each dealer activates it locally.



CO-OP CHECK

Confirm reimbursement rules before dealers commit. A program dealers can't get reimbursed for won't get adopted.

FRANCHISE VERSION

Replace enrollment with the participation rules in your franchise agreement, and co-op with the brand or local fund that pays for the program.

THE HANDOFF THAT MATTERS

Offer codes loaded in each dealer's CRM before week 0. Without them, outcomes can't be matched back to the program.

CHAPTER 06

Measuring what works across the network

Report at three levels. Keep three kinds of evidence separate. Compare locations fairly.

Network results usually arrive in pieces: mail data from one source, digital from another, location performance assembled by hand. In the 2025 AFMR, 48% of franchisors said they leave franchisees to track and manage local efforts on their own.[5]

The gap isn't unique to franchising. In IAB's 2026 State of Data research, only **39%** of U.S. brand and agency decision-makers use incrementality testing, attribution, and marketing mix modeling together, and **71%** of attribution users say their approach doesn't reflect full-funnel outcomes well.[13]

Three levels of reporting, one set of definitions

LOCATION
Is this program working in this market, and what should this owner do next?

REGION
Are there patterns by geography, market type, or agency the network should act on?

NETWORK
Which programs, offers, and channels deserve more of next year's budget?

A "booked appointment" in Tucson should mean the same thing as one in Toledo.

Climb the evidence ladder before you claim impact

LEVEL 1

Reporting

What happened. Delivery, spend, responses, appointments, sales. Necessary, but descriptive.

LEVEL 2

Attribution

What is associated with an outcome. Recipients matched to later customers in a set window. Useful for allocation; it doesn't prove cause.

LEVEL 3

Incremental impact

What happened because of the program. Contacted households compared with a comparable group that wasn't contacted. The strongest basis for budget decisions.

Figure 6. Only claim what your evidence supports. Attribution describes observed outcomes; claims of incremental improvement need a comparison group.

CHOOSE OUTCOMES CLOSE TO REVENUE

Prioritize outcomes locations already record: booked appointments, completed jobs or fittings, units sold, revenue per new customer, and cost per acquired customer. Treat response rates and clicks as diagnostics, not verdicts.

FIVE RULES FOR FAIR CROSS-LOCATION COMPARISONS

1. **Normalize for opportunity:** rates per 1,000 eligible households, not raw totals.
2. **Compare like with like:** group by market type, maturity, and territory size.
3. **Use one window** suited to the buying cycle, everywhere.
4. **Separate program from operator:** track speed to follow-up alongside results.
5. **Respect small numbers:** 12 sales can swing 50% on chance. Show ranges or pool.

TOOL 6 Network KPI dashboard example

ILLUSTRATIVE DATA · NOT CLIENT RESULTS

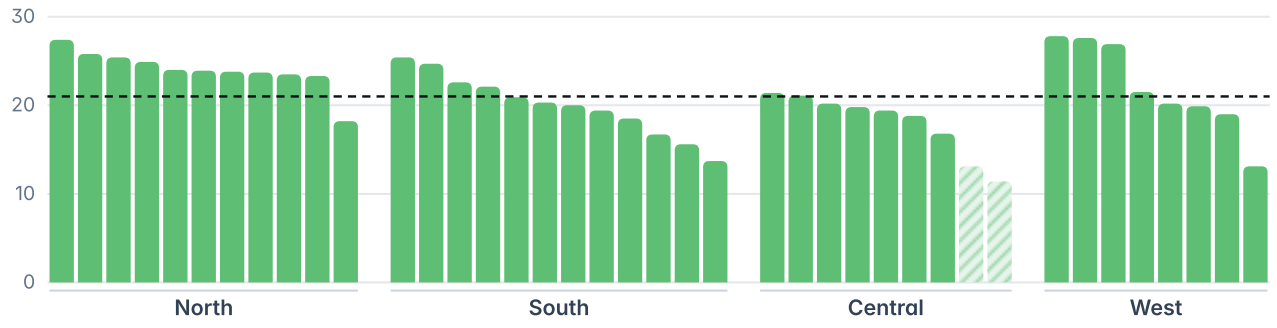
Spring replacement program · 40 pilot locations

All regions | 90-day window | vs. holdout

HOUSEHOLDS CONTACTED	BOOKED APPOINTMENTS	LIFT VS. HOLDOUT	NEW CUSTOMERS	COST PER BOOKED APPT.
184,000	**3,870**	**+0.65 pts**	**1,160**	**$55**
40 locations · 4 regions	2.1% booked rate	≈1,200 incremental	within 90 days	program cost $212K

Booked appointments per 1,000 households, by location

---- Network median (21.0) ▨ Small sample



REGION	LOCATIONS	HOUSEHOLDS	BOOKED RATE	LIFT VS. HOLDOUT	COST PER BOOKED APPT.
North	11	51,200	2.4%	**+0.9 pts**	$48
South	12	56,800	2.0%	+0.6 pts	$57
Central	9	41,500	1.8%	+0.4 pts	$63
West	8	34,500	2.2%	+0.7 pts	$53

How to read it. North leads on both rate and lift. Central trails, but most of its locations are newer, so compare it with other newer locations before cutting its budget. The two hatched Central locations contacted too few households for a stable rate; treat them as directional.

CHAPTER 07

Making the operating model work

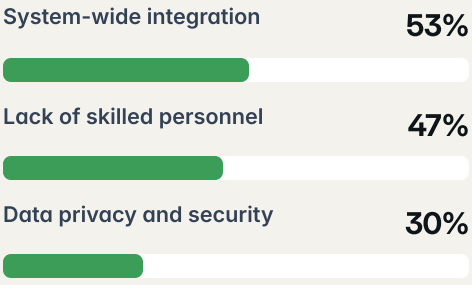
Most networks don't need a new stack. They need clear ownership, a shared workflow, and data that can move.

The best-designed program will underperform if locations don't adopt it, agencies work around it, or the data needed to measure it never arrives. The operating model deserves as much attention as the creative.

Five operating decisions

1. **Participation: required, incentivized, or optional?** Franchisors can often require participation in brand-funded programs. Dealer networks usually rely on incentives such as co-op eligibility. Either way, a location should be able to see the program, choose its options, and confirm in one place.
2. **Approvals: one path, with deadlines.** Define which local changes need approval, who gives it, and how quickly. Pre-approved options remove most approval traffic.
3. **Agency roles: execute inside the program, not around it.** Agencies keep ownership of creative, production, media, and campaign operations. What changes is that they work from the shared audience, kit, and reporting model.
4. **Data access: agree on the minimum viable data.** Customer records for seeds and suppression, and outcomes such as appointments and sales by location. Agree on fields, refresh cadence, and access rights before launch.
5. **Governance: write the rules down.** Data use, consent, retention, sensitive categories, contact frequency, and co-op compliance. Revisit them when you add a channel, a category, or a state.

WHAT HOLDS BACK AI ADOPTION IN FRANCHISE MARKETING



- Franchise Update Media, 2025 Annual Franchise Marketing Report[5]

Integration, not ambition, is the hurdle franchise marketers name most often.

WHO DOES WHAT IN A CONNECTED PROGRAM

Corporate marketing	Location owners	Agencies	Technology platform
Strategy, budget, objectives, participation rules, and the measurement plan	Local options, capacity, follow-up, and outcome data	Creative, production, media, and campaign operations	Software, agreed-upon integrations, onboarding, and support

CONNECT, DON'T REPLACE

Ask any new tool two questions: what does it replace, and what does it connect to?

Most networks already run CRMs, point-of-sale or dealer management systems, agency portals, print vendors, email platforms, and ad accounts. A coordinating layer should read the customer and outcome data it needs, send audiences to the channels and vendors already in use, and return results. It shouldn't force a migration.

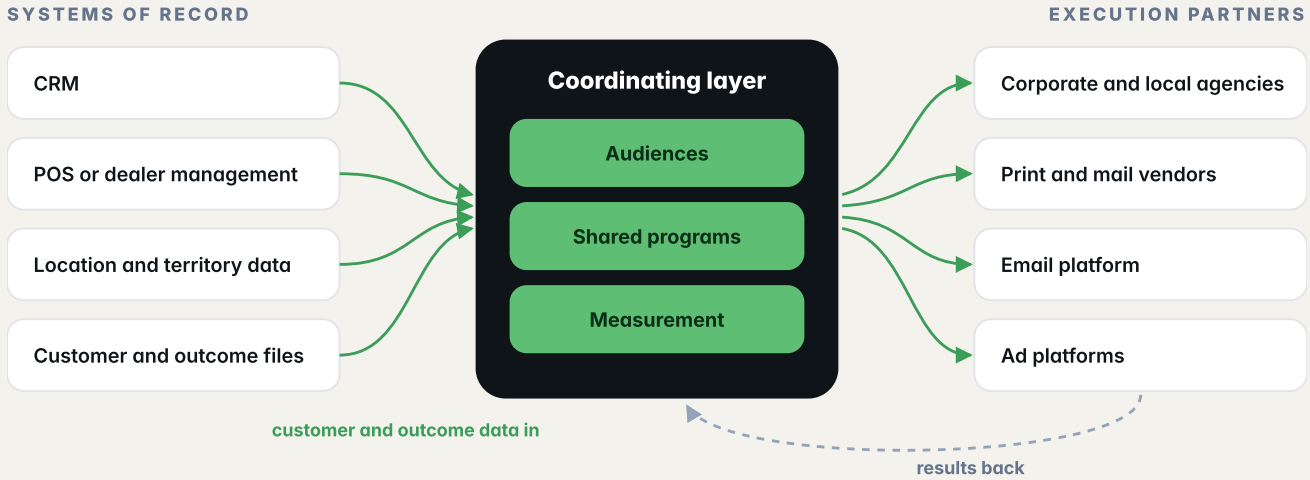


Figure 7. A coordinating layer connects the systems you already run. Data flows in from systems of record; audiences and programs flow out to execution partners; results flow back.

Governance checklist

- ✓ **24 U.S. states** now have comprehensive consumer privacy laws; most require opt-in consent for sensitive personal information.[11]
- ✓ Health-adjacent categories may fall under consumer health data laws, such as Washington's My Health My Data Act, which also restricts geofencing around in-person health care locations.[12]
- ✓ Email and SMS need permission appropriate to the channel and jurisdiction. Suppression lists are shared, not per-agency.
- ✓ Co-op and promotional allowances should be available to competing dealers on proportionally equal terms.[10]

Document who can see which location's data, and why. Location owners trust shared programs more when they know corporate and other locations can't see their customer records without a defined purpose.

CHAPTER 08

A practical 90-day roadmap

Prove the model on a small group of locations, with measures agreed upon before launch.

Network-wide launches are tempting and rarely instructive.

A focused pilot (one program, one sponsor, a defined group of locations, and a comparison plan) produces evidence you can take to franchisees, dealers, and your CFO. A group of 5–10 locations is a practical starting point for many networks. Size yours to produce enough outcomes to read.

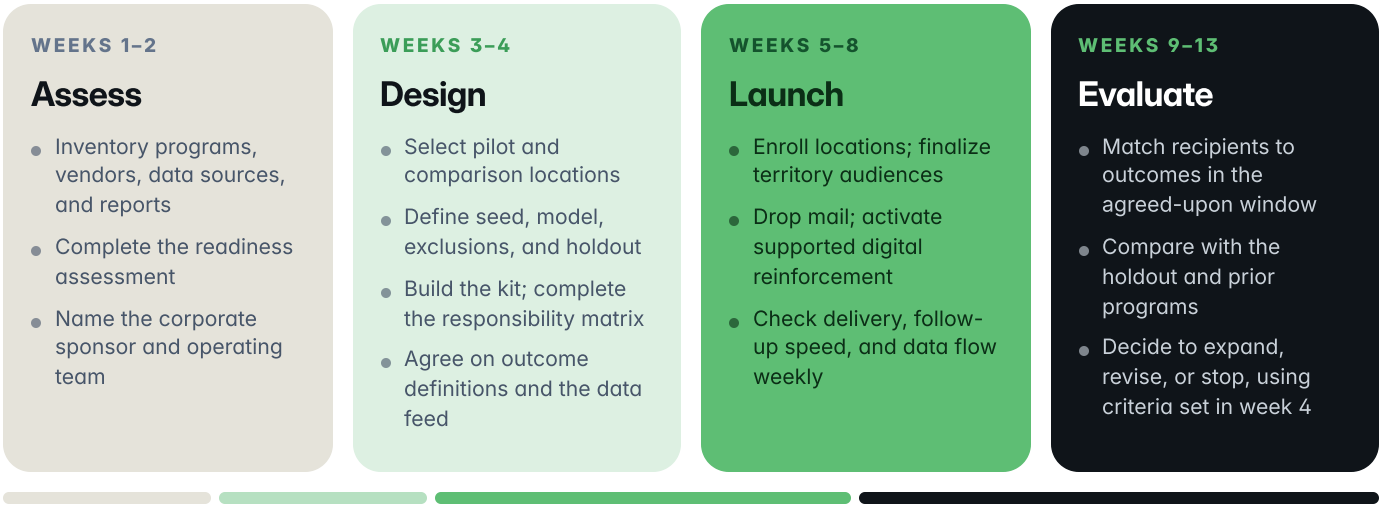


Figure 8. Four phases in about 13 weeks. In categories with longer buying cycles, report early indicators at day 90 and final results when the outcome window closes.

Choosing pilot locations

Mix your markets

Include strong, average, and newer locations so results generalize beyond your best operators.

Match a comparison group

Pair pilot locations with similar non-pilot locations, alongside the in-market holdout.

Pick willing owners

Owners who will follow up quickly and share outcome data make the pilot readable.

A GOOD PILOT ANSWERS THREE QUESTIONS

Can locations run it?
Repeatably, with their agencies, without heavy corporate support.

Does it add customers?
Measured against a holdout, not just attributed.

Is the data good enough?
To match outcomes by location in the agreed-upon window.

TOOL 7

90-day rollout checklist

Print it, assign an owner to each line, and review it in your weekly pilot meeting.

PHASE 1 · ASSESS

- [ ] Corporate sponsor named, with decision rights
- [ ] Operating team named (internal or agency), with time allocated
- [ ] Current programs, vendors, and reports inventoried
- [ ] Customer and outcome data sources located; access confirmed
- [ ] Readiness assessment completed; top two gaps identified

PHASE 2 · DESIGN

- [ ] Pilot locations selected across market types; comparison locations matched
- [ ] Primary outcome and matching window defined in writing
- [ ] Seed audience, model inputs, and exclusions documented
- [ ] Holdout size and randomization agreed upon
- [ ] Program kit built: offer, creative, local options, channel roles
- [ ] Responsibility matrix signed off by corporate, agency, and pilot owners
- [ ] Data-use and consent rules reviewed; legal review for sensitive categories
- [ ] Expand, revise, and stop criteria agreed upon

PHASE 3 · LAUNCH

- [ ] Locations enrolled and options recorded
- [ ] Offer codes, tracking numbers, and landing pages live
- [ ] Location staff briefed on the offer and follow-up
- [ ] Mail in-home dates confirmed; digital reinforcement matched
- [ ] Weekly check of delivery, follow-up speed, and data feed

PHASE 4 · EVALUATE

- [ ] Recipients matched to outcomes in the agreed-upon window
- [ ] Results read at location, region, and pilot level
- [ ] Incremental impact estimated against the holdout
- [ ] Findings reviewed with location owners
- [ ] Decision recorded: expand, revise, or stop

Set decision criteria before launch

EXPAND WHEN
Lift over the holdout is positive, cost per incremental outcome is acceptable, and locations ran the program without heavy support.

REVISE WHEN
Attributed results look promising but lift is unclear, or execution gaps such as slow follow-up or missing codes muddied the read.

STOP WHEN
No meaningful lift after an adequate sample and window, or outcomes can't be matched back to the program.

CHAPTER 09

The readiness assessment

An original diagnostic to show where your network should start.

For each dimension, choose the statement that best describes your network today and score it from 1 to 4. Be candid: the goal is to find the constraint, not to grade the team. This is a planning tool, not a validated industry index.

DIMENSION	1 FRAGMENTED	2 EMERGING	3 COORDINATED	4 CONNECTED	SCORE
Data quality and access	Customer data sits in location systems; corporate can't assemble a clean list.	Periodic exports reach corporate; duplicates and gaps are common.	Customer and outcome data refresh on a schedule with shared definitions.	Clean, permitted data feeds audiences and measurement routinely.	☐
Corporate-to-local coordination	Locations and agencies build their own campaigns.	Corporate supplies templates; execution varies widely.	Shared programs with defined, locked, and flexible elements.	Programs are enrolled, adapted, and tracked in one shared workflow.	☐
Audience targeting	Each location buys or pulls lists on simple filters.	Corporate sets criteria; markets apply them inconsistently.	One modeled method from best customers, fitted to each territory.	Modeled audiences refreshed regularly, with exclusions and tests built in.	☐
Cross-channel execution	Channels planned separately by different teams.	Shared calendar, but separate audiences and offers.	One audience and offer across mail and at least one digital channel.	Channels sequenced by role; response data drives follow-up.	☐
Measurement and attribution	Activity metrics only: pieces, impressions, clicks.	Responses tracked; outcomes assembled by hand.	Recipients matched to outcomes by location within a set window.	Location, region, and network reporting with routine holdout tests.	☐
Governance and adoption	No written rules; participation is ad hoc.	Rules exist but aren't consistently followed.	Clear roles, approvals, and data rules; most locations participate.	Rules reviewed routinely; adoption tracked and supported.	☐

YOUR TOTAL ☐ / 24

6–11 · FOUNDATIONAL
Start with data access and ownership. Chapters 2 and 7.

12–17 · DEVELOPING
Standardize the audience method and run a controlled pilot. Chapters 3, 5, and 8.

18–21 · COORDINATED
Add signals and holdout testing; scale what proves out. Chapters 4 and 6.

22–24 · CONNECTED
Allocate budget across programs, regions, and channels using incremental evidence.

Tip: your lowest-scoring dimension is usually a better starting point than your average.

CHAPTER 10

The next step

Teach the network one way of working. Then let the evidence decide what scales.

WHAT TO TAKE AWAY

- ✓ Build programs once; decide what is locked, flexible, and local.
- ✓ Run channels from one audience, offer, and calendar.
- ✓ Apply one audience method, territory by territory.
- ✓ Report at three levels; keep attribution and incremental impact apart.
- ✓ Use signals for timing and priority, and test them.
- ✓ Pilot small, agree on measures first, and scale on evidence.

Twelve questions to ask before investing in a new marketing platform

Ask them of every vendor, including us.

FIT

1. Which of our current systems does it replace, and which does it connect to? What would we have to migrate?
2. How does a corporate program reach a location, and what can the location change?
3. Does it support how our agencies already work, or would they have to rebuild?

AUDIENCE AND DATA

4. What data does it need from us, how often, and in what format?
5. How are lookalike or propensity models built, refreshed, and explained to a franchisee or dealer?
6. Where do third-party attributes and intent signals come from, and how is permitted use handled by category and state?

ACTIVATION

7. Which channels are activated directly, which through partners, and which stay with our vendors?
8. How are suppression and contact-frequency rules enforced across locations?

MEASUREMENT

9. How are recipients matched to outcomes, and what match rates should we expect from our data?
10. Can we run holdout tests by location and region, and see attributed and incremental results separately?

GOVERNANCE AND COMMERCIAL

11. What security documentation can you share, and who can access our data?
12. What does a pilot cost, what does it require of our team, and how will we decide whether to expand?

Bring these to every demo. A vendor that can't answer them in your context isn't ready for a network rollout.

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ABOUT THE ILLUSTRATIVE CONTENT

Scenarios, frameworks, the readiness assessment, and dashboard figures are original to this guide and illustrative. They do not represent client results or validated industry benchmarks.

NOT LEGAL ADVICE

Summaries of laws and regulations are for planning only. Consult counsel on data use, consent, franchise, and co-op questions for your network and states.

relevate ai

WHERE RELEVATE AI FITS

One platform for the connected program this guide describes.

Relevate AI Marketing Hub is purpose-built for distributed organizations: franchise systems, dealer networks, and the agencies that serve them.

Audience intelligence

Customer data, identity resolution, lookalike and propensity modeling, and shopping-intent signals where applicable.

Shared programs

Corporate programs shared to individual location spaces, with locked and adjustable elements.

Activation

Direct mail, email, and supported digital channels from one audience and plan.

Measurement

Reporting and attribution by location, region, and network, using available audience and outcome data.

Relevate AI works alongside your CRM, systems of record, and agencies. Your teams and agencies continue to own strategy, creative, and campaign operations. Relevate AI provides the software, agreed-upon integrations, onboarding, and support.

SEE ONE PROGRAM RUN ACROSS YOUR LOCATIONS

Bring one corporate program and a handful of your locations. In a 30-minute workflow review, we'll map how it could be built once, adapted locally, activated across mail and digital, and measured by location, region, and network.

Request a workflow review →

relevate.ai/franchise-and-dealer-programs

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One Program, Every Territory