

# Candidate Research Form

## Franchise Applicant

First	M.I.	Last	DOB
Address	Email	Phone	Best Time to Call

## Spouse of Franchise Applicant

First	M.I.	Last	DOB
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1 Initial Qualifying	
1.01	Is this your first franchise inquiry?
1.02	What are the specific franchises you are interested in?
1.03	What is motivating your search for a business?
1.04	Would you mind sharing what line of work you're in now? Do you enjoy it?
1.05	What is your time frame for wanting to do this?
1.06	How much money are you wanting to invest in the franchise?

1 Initial Qualifying	
1.07	Do you have a need for funding?
1.08	Do you happen to know what your credit score currently is? Is this an estimate?
1.09	Are you familiar with the concept of franchising?
1.10	Notes:

2 Zoracle SpotOn!	
2.01	Summary Comments
2.02	Value Comments
2.03	Stages of Growth Comments
2.03	Culture Comments
2.04	Work style Comments

2 Zoracle SpotOn!	
2.05	What work activities do you enjoy?
2.06	Are you comfortable attending networking functions to promote your new business?
2.07	Competencies Comments
2.08	Sales and Business Comments
2.09	Are you interested in Multiple-Unit Operation or Masters?
2.10	Needs and Wants Comments
2.11	Are planning on having a partner in the business?
2.12	How does your family feel about your interest in this?
2.13	What types of employees would you prefer to work with (if any)?
2.14	What size staff are you comfortable with?

3 Eligibility	
3.01	How do you plan on funding the business?
3.02	Do you have retirement plans (Such as 401k) you plan to use?
3.03	Have you been in the military or could you qualify for a VA loan?
3.04	Is your current net worth over \$500,000? If not, what is your current net worth?
3.05	Have you or your spouse ever been convicted of something other than a minor traffic violation?
3.06	Are you or your spouse subject to a pending litigation or unsatisfied judgment?
3.07	Have you or your spouse ever declared bankruptcy? If yes, when was it discharged?
3.08	Notes:

4 Experience	
4.01	Have you ever owned a business before?
4.02	Do you have any marketing experience?
4.03	Do you have any management experience?
4.04	Do you have sales experience?
4.05	Do you have experience in reviewing financial statements?
4.06	Do you have customer service and account management experience?

5 Wants	
5.01	What do you find most attractive about being a business owner?
5.02	From your past experience is there anything you prefer not to handle with your new business?
5.03	What are your expectations from the business? What type of lifestyle are you looking to achieve?

## Fact Finding and the FLS (FranLink System)

Please visit the FBA Member's domain at [www.fbamembers.com](http://www.fbamembers.com) and click on "FranLink System" to enter the information into the system. This will populate franchises that match the criteria entered into the system.

5.2 Wants		
5.2.01	Do you prefer B2B or B2C?	B2B   B2C
5.2.01	Do you prefer a physical location or home-based business model?	Store   Home
5.2.01	Would you prefer to have an inventory or service-based business model?	Inventory Service
5.2.01	Are you comfortable with a business that requires cold calling?	Yes   No
5.2.05	Are you going to be in this business as an owner/operator or do you prefer a passive model, semi-passive model?	Owner / Operator Passive   Semi
5.2.06	Is working standard business hours (9am-5pm) important to you?	Yes   No
5.2.07	Notes:	

6 Category		
6.01	Rate your interest in the following industries on a scale of 1-10	
	Advertising	Financial Services
	Automotive	Fitness
	Beauty	Food & Beverage
	Building, Storage, Decorating	Green Company
	Business Services	Health, Medical & Nutrition
	Child Education & Development	Home Improvement
	Computer Technology	Lodging
	Dry Cleaning, Laundry	Maid Service & Cleaning
		Management & Training
		Pet Care & Animal Services
		Print, Copy, Packing & Mail
		Repair & Restoration
		Senior Care
		Signs
		Sports & Recreation
		Staffing
	Unique, Please Describe	

7	Territories	
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7.01	Where are you looking to open your business? List the Zip Codes.	
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7.02	Are you interested in masters?	Yes   No
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8	Immigration	
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8.01	Is this a candidate that will be requiring a visa? If so, E-2, L1 or EB-5?	
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Notes:
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