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How franchised small businesses can leverage new technology to grow their business

New technology doesn't have to change everything

grow for small business

franchise document generation

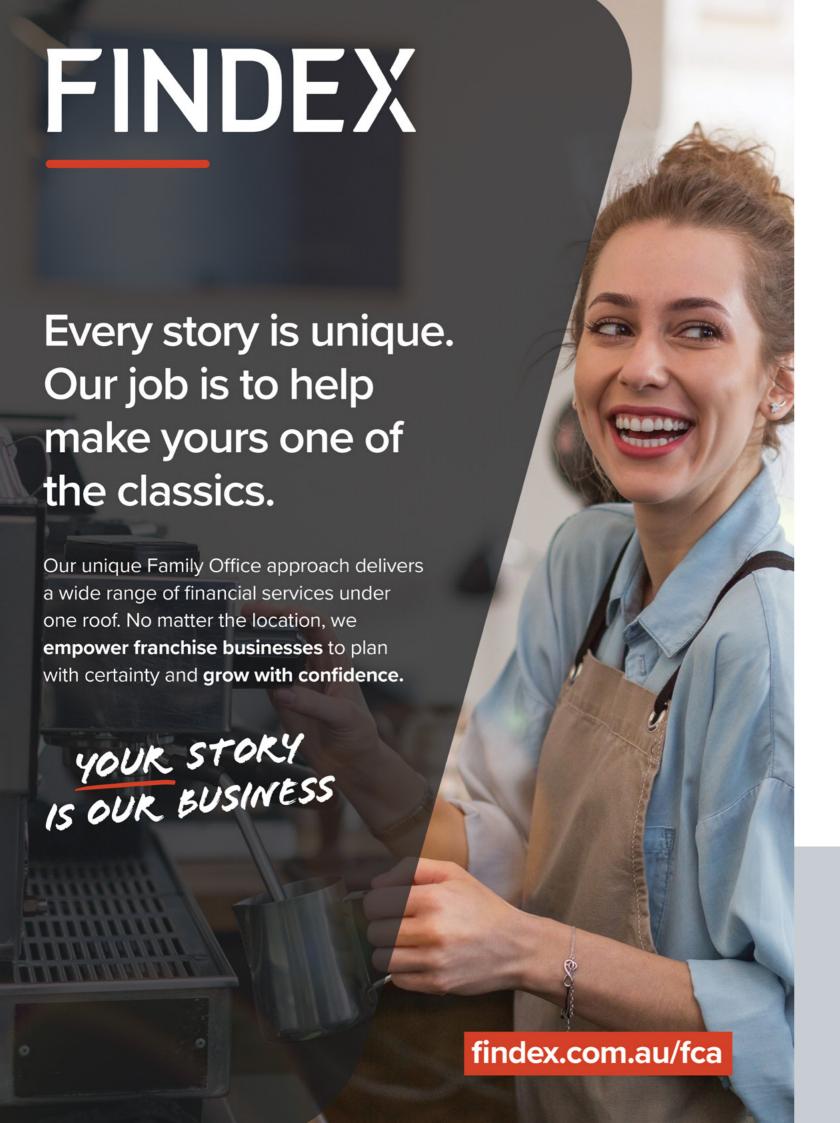


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FRANCHISE COUNCIL OF AUSTRALIA

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A message from the CEO Looking to 2023

Mary Aldred,

CEO, Franchise Council of Australia

The last two years have represented some of the most difficult economic conditions ever experienced by Australian businesses. In this environment, both franchisors and franchisees have demonstrated boundless adaptability and resilience, which has highlighted the strength of franchising as a business model.

While COVID trading restrictions have been consigned to the rear-view mirror, significant new challenges for small businesses across Australia have emerged.

Growing global uncertainty has underlined the need for responsible economic leadership at a national level to build stability and confidence.

In response to this situation, the Franchise Council of Australia has escalated its activism, practical support and engagement with members by vigorously advocating on their behalf to promote the ongoing success of franchising in Australia.

As part of this effort, the FCA has continued to engage deeply with all levels of government both informally and formally, including urging the new Federal Government to make addressing the key issues facing small businesses a priority

Franchising experienced extensive regulatory reform under the previous government, and is currently adjusting to these reforms, while also striving to recover from the COVID pandemic.

A key plank of the reforms, a Franchise Disclosure Register maintained by the Federal Government, went live on Tuesday 15 November.

The purpose of the register is to help prospective franchisees undertake due diligence prior to making an investment decision.

To date, over 1,400 companies have registered – which represents the vast majority of franchisors in Australia. This highlights the strong commitment of franchise businesses to transparency and compliance.

The FCA is continuing to liaise with the Federal Government on the performance of the register, with an eye towards contributing to the government's statutory review of the register in 12 months.

Beyond regulatory reform, there are five key challenges which have been raised by our members as continuing to impact on their operations and profitability:

- Skills and labour shortages
 The increasing cost of doing business
- Supply chain risks
- Commercial leasing issues
- The lack of a national approach to single-use plastics

Addressing the issues facing Australian small businesses will be essential in ensuring that our economic recovery is sustained.

From hamburgers to hairdressing, the number one issue for small business is a lack of available staff. This is holding back their ability to open and operate at full capacity.

With record low unemployment, employers have tapped out local staff availability. Australia desperately needs "Addressing the issues facing Australian small businesses will be essential in ensuring that our economic recovery is sustained."

the pre-COVID levels of international students, working holiday makers and skilled visa holders to return to our shores

The FCA welcomes the Federal Government's decision to lift the permanent skilled migration intake from 160,000 to 195,000 for this financial year to help fill immediate gaps.

Accelerating wages and supply constraints put pressure on inflation, which sits at number two on our list. The consumer price index (CPI) measures the change in the price of goods and services over a period of time and over the year to October 2022, the CPI rose 6.9 percent.

Why is that important? Because it puts upward pressure on all costs, including

interest rates. As a result of this, the cost of doing business is climbing.

At number three are supply chain challenges. If businesses can't source enough products, they can't fill orders to customers and can't run to capacity.

At number four, commercial leasing for brick-and-mortar businesses is a perennial issue. An ongoing national leasing code would block unconscionable conduct, facilitate good faith bargaining, and support hardship assistance for small business tenants.

Numerous franchisees have spoken to the FCA about landlords asking for tens of thousands of dollars in rent deferred from the COVID period, threatening eviction if they don't comply.

The fifth challenge is the inconsistency of state-based single use plastics bans. Businesses are already leading the way on sustainability, but they need time to find alternative suppliers to implement changes. Competing and confusing state-based rules add unnecessary time and cost There should be one, streamlined, national set of single-use plastics rules.

As we look to 2023 with optimism, the FCA remains committed to supporting the ongoing success of our members, franchising and small businesses across Australia.

On a personal note, after four and a half years leading the Franchise Council of Australia as CEO, I have decided that it is a good time to move on.

To represent the best interests and most pressing challenges of a sector that carries the Australian economy, and community, through thick and thin has been a great honour.

The team of professionals I work with are passionate about supporting Australian small business, experts in their field and the most wonderful people I have had the privilege to work with. I know that I am leaving the FCA in great hands.







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As many have experienced, legacy software and different accounting packages can often prevent projects from even getting off the ground. Boston Consulting Group estimates that close to 70 percent of digital transformation projects don't meet desired outcomes.

So, is it the salesperson's fault for overpromising? Is it the software's usability that leads to these failures? Or are group controllers and individual businesses to blame for poor implementation? All can be the cause of a failed technology project; however, this is only one side of the coin.

The strategy of many new technologies is to create new ways of working. This doesn't need to be the case, especially for established franchise groups.

Using a new technology that works within your existing structures and changes elements only where necessary, can greatly reduce the risk of failure, whilst unlocking hidden performance and growth opportunities.

Simplify & Consolidate

Look for technology that simplifies and consolidates your current technology suite. Businesses often jump at new functionality and reporting without considering the often already overloaded technology stack imposed on staff or customers

Harvard Business Review reports that on average, workers toggle between software up to 1,200 times per day. People have a limit to the range of tools and technology they can reasonably be expected to use. So, utilise technology that creates a simpler suite for reduced complexity.

Technology that creates a streamlined communication process or a single point for workflow and project updates will go a long way in understanding differing work occurring across your business, whilst also helping reduce the technology strain customers and staff experience.

Standardise

Left to their own devices, members of your franchise group will create an evergrowing array of processes.

Franchisors need to utilise their full view of a franchise group in conjunction with technology to guide franchisees into a consistent 'one best way' approach.

It's not enough to use a workflow platform that still requires high levels of customisation. Standardised and prescribed processes enabled through technology create opportunities for group wide performance monitoring and benchmarking. With the reporting tools enabled through standardisation, improvements will be jumping right out of your financial reports.

Standardisation can assist many areas within your groups structure, but none more so than the Chart of Accounts.

Anyone who has spied the financial reports of individual franchisees will unfortunately know that each report will almost read as if it is a different language.

Available technology can solve this without creating new systems and enforcing changes to account structures. This technology standardises this labyrinth of data with mapping logic to create standardised financial data that group operators can leverage for clear overview and insight of their performance.

When combined, these technology attributes unlock growth

A simplified technology suite and unified workflow management structure will allow you to identify pain points hindering your staff or members and reduce workload requirements.

Standardised processes and workflows will guide members to use the 'one best way', whilst also creating consistency within your groups data.

Incredibly powerful reporting tools are then able to use this simplified and standardised data to create live performance scorecards and groupwide benchmarks. The roadmap for performance and growth is already paved within the fabric of your group's operations and data. It's heightened performance monitoring and tracking of leading and lagging indicators which will surface growth opportunities.

What does a complimentary technology stack look like?

The golden question.

Working with many groups, we at Visory know firsthand that each group is different. That being said, certain structures are better than others, and this is an example of one which exhibits all of the attributes mentioned above.

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As a franchise group, the benefits of such a unified and efficient software stack are astronomical, with the growth opportunities identified in clear reporting and benchmarks almost being secondary to the workflow efficiencies realised across your entire group.

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Energy Australia

Four ways franchises can leverage new tech to boost their business network

By Kerryn MillarNational Training Manager
Rate Money

"Technology on its own is not a magic pill that will make franchises more successful, but empowering franchisees with the training, platforms, systems, processes and tools to support growth in their business certainly goes a long way to contributing to their success."

One of the ways in which franchising helps small businesses level the playing field against larger organisations is by leveraging scale. A key way franchises can use scale effectively is by introducing the right technology.

In the last few years, we've seen advances in technology geared towards driving productivity and efficiency off the back of COVID. This reinforced how important technology is in terms of remaining competitive, strengthening your business model, improving customer experience and driving growth. Here are four areas franchised small businesses can benefit from new tech.

Automation

While automation might be a big sell for an individual small business, a franchise has good reasons to roll out automation technology across its network. Among its benefits, automation offers efficiency and improves productivity, while providing consistency of process.

We use an automated CRM system that has given us the ability to manage workflow, streamline tasks and better engage with customers, prompting us to reach out at key moments in the customer relationship lifecycle so we can win and retain clients.

Connectivity

Our system is a custom-made CRM called Lodgic that is a hub for a spectrum of functions and processes including marketing, compliance and data validation. Importantly, it provides a range of communication methods, from text to emails and videoconferencing (invaluable through COVID). This provides us with more flexibility to reach out to our customers in a variety of ways that suit them.

in a variety of ways that suit them.

These systems are often beyond the reach of individual small businesses, but a franchise can introduce enterprisewide technology to the advantage of its network

Collaboration

Technology creates collaboration
- not just between Head Office and
individual franchisees but between
franchisees as well - especially within
a network of multiple businesses
spread across different geographical
locations as well as creating the feel of a
shared workplace. This is critical to the
development and success of the wider
franchise system

We use Microsoft Teams, but there are a plethora of other tools such as Slack or other chatbot software available, which have their own benefits.

Collaborative technology gives small businesses a platform to participate and allows franchisees to feel part of the wider business. Leveraging this capability has allowed us to engage with our franchisees to deliver training programs and webinars, with some of the benefits of being face-to-face, without having to be in the same physical space. Creating a more cohesive and collaborative environment.

Marketing

What we've learnt over the years is that it is important to ensure marketing tech integrates with existing systems. One specific tool we use is an email marketing platform called ActivePipe which connects to our CRM, so when

we run a successful campaign we can nurture and convert a lead and then maintain a relationship with that client through the aforementioned automation and connectivity functions. This enables us to run marketing campaigns centrally as a franchise as well as on behalf of the franchisees and then distribute leads to the branches that are best placed to serve that client

A major benefit of the enhancements of marketing technology are the opportunities revealed by deeper analytics. Thanks to these enhancements we've been able to refine our target demographic, which makes us more effective at appealing to our core market, as well as allowing our budget to go much further. It also assists in ensuring that our spend isn't wasted on advertising to people that don't fit our product criteria.

Key takeaways with marketing tech is to ensure that each piece of tech integrates with one another and that you continue to enhance your ability to collect and analyse data, this in turn will ensure that you speak to your target market and them only.

Technology on its own is not a magic pill that will make franchises more successful, but empowering franchisees with the training, platforms, systems, processes and tools to support growth in their business certainly goes a long way to contributing to their success.

At Rate Money, given we are a new business, we are not restricted by outdated technology and systems. Being agile and nimble, we have the advantage of adapting to the everchanging environment and the needs of our franchisees, who are our most important stakeholder. We focus on investing in technology and supporting the network with relevant training to improve productivity and help drive their success. For us ensuring our systems and processes are 'future fit' is a priority.



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Modern small businesses have accelerated their adoption of digital technologies to enable remote work, improve operations and grow sales. They have increasingly collected larger amounts of data from their customers in order to support enhanced sales and marketing efforts. Both trends were accelerated by the pandemic.

Cybersecurity risks grow for small business as Federal Government considers action

by Mary Aldred

Chief Executive Officer
Franchise Council of Australia

Virtually everything has become digital. All sensitive personal files are stored on computers and banks and credit card accounts are accessed online, as is the financial information of companies, big and small.

Franchising is the predominant business model in the small-to-medium business sector and while growth is strong, largely due to the strength and underlying support for individual small businesses in franchise networks, there are persistent risks of cyber-attacks.

Most small businesses do not include cybersecurity in their list of immediate practical concerns. However, this thinking often relies on the incorrect belief that they are too small for cyber criminals to worry about, and don't have enough data to warrant a breach.

According to reporting in the Australian Financial Review, there were 428 data breaches at Australian companies in the first six months of 2022. While 11 data breaches each affected up to 10,000 people, the majority of cases (71 percent) involved the personal information of 100 people or less.

This reflects the fact that small businesses with limited, yet valuable stores of data are increasingly being targeted by cyber criminals.

During 2020 and 2021, data breaches at small businesses globally soared 152 percent in comparison to the two previous years, according to RiskRecon, a MasterCard unit that assesses companies' cybersecurity risk. This figure is twice as large as it was among larger companies in the same period.

The fundamental truth is that cybersecurity breaches can result in significant costs for businesses.

There are financial costs, which are often represented by additional expenses on the general accounting ledger, including ransomware payments, lost productivity, increased payroll hours, investigations, regulatory filings and legal fees.

And there are reputational costs associated with negative publicity. A 2020 survey by Arcserve found a link between data breaches, consumer purchasing behaviour and brand loyalty - with 59 percent of consumers saying that they'd avoid companies hit by a cyberattack in the past year.

In the wake of high-profile data breaches this year, the Federal Government has signaled that it is considering new laws that would force companies to take more effort to protect sensitive customer and employee data.

Rather than focus on any single data breach, there is growing movement within the government to fundamentally change the way Australian companies use data. This attitude can be seen in the comments of the Attorney-General, Mark Dreyfus MP, who said on Sunday 2 October, that companies should "stop regarding all of this personal data of Australians as an asset for them, they actually should think of it as a liability."

The Federal Government has already moved to increase the penalties large companies face for serious or repeated data breaches and has introduced stronger powers for the Information Commissioner.

Further legislative and regulatory reforms could include new protections on personal information, and mandating that small businesses with turnover under \$3.1 million report data breaches to customers – removing their exempt status.

The FCA is committed to working with all levels of government to help improve cybersecurity, while also ensuring that small businesses are not unnecessary burdened by bureaucratic red tape which only serves to increase the cost of doing business

As outlined by the former Head of the Australian Cyber Security Centre, Alastair MacGibbon, compliance-centred reforms often burden companies, and rarely work. From cybersecurity to workplace safety, embedding the right culture beats box ticking regulation every time.

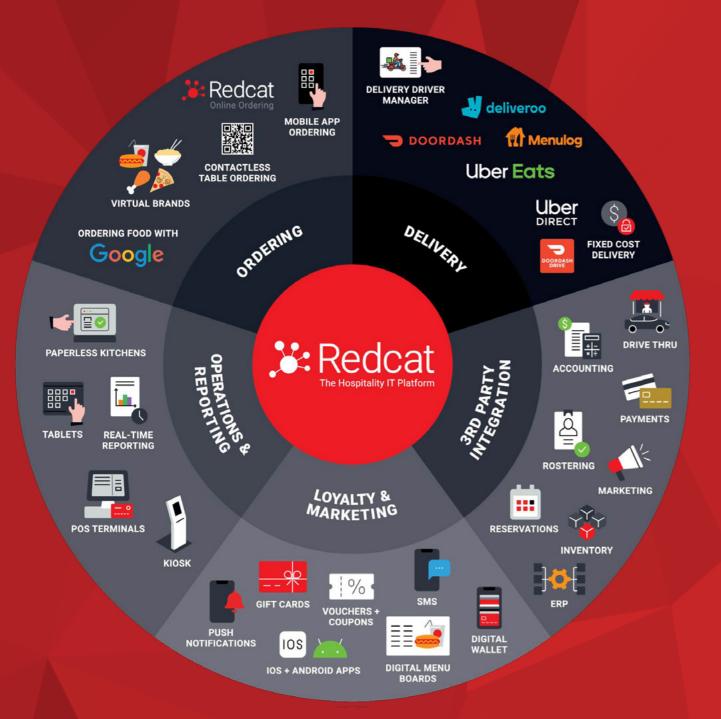
Regardless of new regulations, there are several steps which small-to-medium franchised businesses can take now to help reduce their cyber risk:

- Embed cyber safety into your business culture. Studies have found that human error was involved in over 85 percent of breaches. This risk can be reduced if cyber education and awareness was added to a business's normal training program.
- Deploy malware prevention software and keep it updated.
- Regularly review who inside the business has access to sensitive data and if that access is still required.

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FRANCHISES OSR FAST CASUAL







By Helen Whait

Founder - ActivOT

After a decade working in occupational therapy, I was sick of paperwork over patient outcomes, cost-cutting over care. and wanted to be the change I wanted to see in healthcare.

I wanted to create a business that was designed for occupational therapists, by occupational therapists - helping them become business owners without burning

In 2012 I took a leap into franchising and founded Australia's first and only occupational therapy franchise business -

Back then, franchising in allied health was virtually unheard of - it still is! But I it could deliver better outcomes for our

Ten years later, I'm proud to say ActivOT has 53 franchisees and is growing rapidly

Disrupting an industry and bringing franchising to a new sector is no easy feat particularly in health care. It's a complex, risk-averse sector with its own unique challenges. But it can be done.

Outlined on the following page are four key insights from a decade in franchising.



Franchising is misunderstood and needs a rebrand

Franchising is often seen as inflexible and expensive, with franchisors filling their pockets at the expense of franchisees. But that's not how it should be, nor is it our story.

A good franchisor should be an enabler, not a dictator. They should be focused on helping their franchisees succeed by providing the tools, resources and support they need to grow their business.

At ActivOT, we've deliberately designed our franchise model to buck the franchising stereotype.

Our business does not operate as other franchises do. Instead, we're a 'co-operative' of therapists who pool resources and support so that everyone involved can succeed. This collaborative model is unique in franchising. It's built on the principle that we're all better off when we work together and it's something I'm passionate about.

While our franchisees benefit from a range of business systems that many franchises typically offer, ActivOT franchisees do not operate as competitors or within set geographical boundaries.

Instead, a central management team aims to match up the best fit between franchisee areas of expertise with each client's needs. Franchisees collaborate to provide the best service delivery for clients and step in to cover each other as needed. It's a system that's built on trust, respect and mutual benefit - which is how it should be.

Make it truly win-win-win

The key to any good business model is making it win-win-win.

Our franchisees keep 85% of their earnings (plus 100% of all billable travel time), ensuring their financial security. As a result, the average income of an ActivOT franchisee working full-time is 97% more than the average salary for occupational therapists working full time in a government role.

This approach has proven to be powerfully effective, with the business growing rapidly and franchisee satisfaction consistently high. In the past twelve months alone, we've welcomed 15 new franchisees and our win-win-win approach is a key selling point when recruiting new franchisees and I'm proud to say that our turnover rate is virtually non-existent with most of our therapists staying on for many years.

Partner with people whose values align with yours

People are shocked to find out we don't have local marketing campaigns in place - yet we service thousands of clients every year. The key to our success? Franchisees that are passionate about what they do and driven by the same values that guide me and my business.

They live and breathe our values by providing the highest quality care possible to their clients and in return, those clients become our best advocates. As a result, we have a devoted client base that continues to grow organically, with referral growth rising by 42% year-on-year.

It's not one-size-fits-all so don't be limited by how others do things

Although we've created Australia-first occupational therapist franchise, we're doing something very different from the traditional franchise model.

Franchising can be adapted to suit any business model, it doesn't have to be one-size-fits-all - you can write your own rules. That's what we're doing at ActivOT. We're adapting the franchise model to create something that works for us, our therapists and most importantly, our clients.

So, if you're thinking of franchising your business, don't be limited by what's come before or assumptions about how things should be done. Be open to change, innovate and make it truly winwin-win. Together, you might just create something amazing.



























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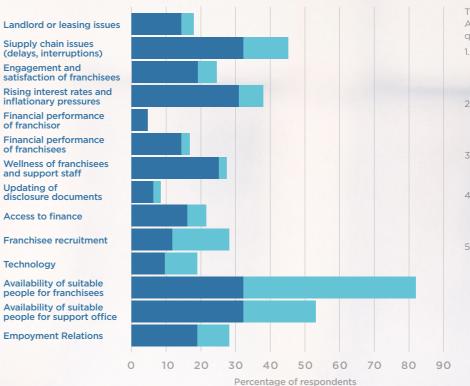
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Ongoing staff shortages for small businesses across Australia represent a real challenge to current operations and have the potential to undermine future growth plans, according to the latest national survey of franchised businesses.

Key insights from the September Pulse Check Survey

18 | thefranchisereview

Key challenges being faced by Australian franchise systems



The greatest concerns or challenges for Australian Franchise Systems in the July 2022

- 1. Availability of suitable employees for franchisees at 83% (33% high and 50% very high). Up again from 80% and 64% in the previous two quarterly surveys).
- 2. Availability of suitable employees for support office at 55% (33% high and 21% very high) down from 60% and 40% in the previous two quarterly surveys.
- 3. Supply chain issues at 45% (32% high and 13% very high) down from 54% and 52% in the previous two quarterly surveys.
- 4. Rising interest rates and inflationary pressures at 39% (32% high and 7% very high) down from 46% in the June quarter
- 5. Franchisee recruitment, wellness of franchisees & support staff and Employment relations were also significant all being identified as high or very high challenges by 28-29% of respondents.



The exclusive survey, prepared for the FCA by FRANdata, is designed to provide a quarterly snapshot of the Australian franchise sector.

The September Quarter 2022 Franchise Business 'Pulse Check' survey received responses covering 105 brands, capturing 18,482 businesses, who employ 202,223 Australians.

The greatest challenge for small businesses reported by the survey is the availability of suitable employees for franchisees at 83%. This is a record high for the survey and represents an ongoing trend - with 80% nominating the issue in the July survey, and 64% in March.

Availability of suitable employees for support offices (55%) was again the second largest issue for small businesses.

Supply chain issues (45%) and rising interest rates & the inflationary pressures (39%) rounded out the top four challenges. Fewer small businesses nominated these challenges compared to the July survey - highlighting the sector's focus on employment concerns.

Despite ongoing challenges and economic headwinds, small business sentiment about the next six months is improving. 67% feel either optimistic or very optimistic (up from 57% in July), with 19% neutral and only 14% pessimistic.

Year-on-year quarterly trading continues to recover. Nearly half of small businesses (47%) reported an increase

in their September 2022 quarter income compared to September 2021 of more than 10%.

QLD, at 33% of respondents. remained the strongest performing state/territory for franchises over the past 12 months - down from 46% in the July survey. This was followed by NSW (24%), WA (21%), VIC (17%) and SA (5%).

Despite this, 37% of small businesses nominated VIC as the most likely location for expansion within the next twelve months - followed by NSW (36%), then QLD (22%) and WA (5%).

As we all know, small businesses are the engine of the Australian economy. When they proposer, our country prospers.

The survey results demonstrate that the situation for small businesses across Australia in regards to staff shortages is

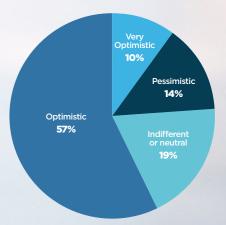
According to data from the Australian Bureau of Statistics, 698,000 fewer people arrived in Australia in September 2022 compared to September 2019 - a reduction of 39%.

The FCA has been consistently advocating for the Federal Government to take urgent action to address this challenge.

"It is not enough for the Australian border to be open, specific actions to increase the domestic participation rate and the attractiveness of Australia as a destination for international labour are needed," said FCA CEO Mary Aldred.

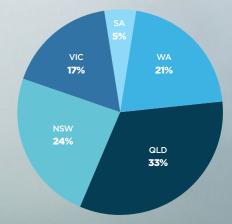
Forward Business Condition Sentiment

October 2022 - March 2023



Strongest Performing State for Franchisees

Last 12 months



Establish Your 'Reasonable Steps'

Discovering your franchisees failed to meet their employment compliance obligations could be a disaster for your organisation on multiple fronts.

Under the Fair Work Act 2009, franchisors are required to take 'reasonable steps' to manage their brand's employment compliance. Failing to do this can mean franchisors could be found liable for breaches made by their

franchisees. Some of these steps include:

- Setting Expectations
- · Educating and Training
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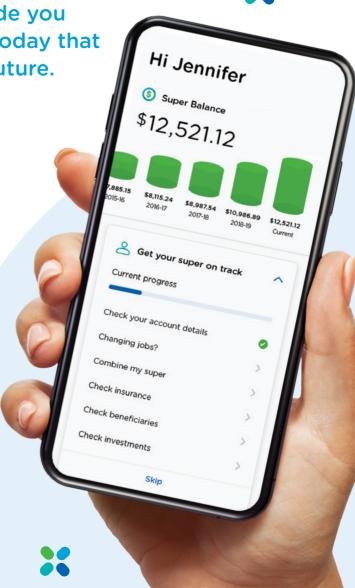
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"A process which previously required a full-time lawyer, can now be completed in less than 15 minutes by staff with no legal training."

Around two years ago, Clark Rubber identified that the generation of legal documents for new and renewing franchisees was an area of our business consuming a significant amount of time

Like most franchisors, we had spent a considerable amount of time and effort standardising and templating our franchise pack contracts so that limited customisation or bespoke drafting was required. However, even with this standardised process, we still needed a dedicated in-house lawyer assigned to franchise pack generation on a near

In addition to the time inefficiencies associated with manually preparing legal agreements, we were also keen to reduce the risk of human errors creeping into our franchise documents. Some examples of these errors included ncorrectly completing sections of template agreements, typographical errors, accidentally using out-of-date versions of agreements, or some documents not being correctly updated when new details were provided by (or negotiated with) a franchisee.

I had heard that document automation could be a possible solution, but I had assumed that with all the different scenarios and considerations that get taken into account when generating the legal agreements for franchisees within the Clark Rubber system (and the number of documents and possible variations to those documents that can result) - these matters would be either too complicated or too costly to automate.

Fortunately for Clark Rubber, our external legal advisers (Sierra Legal) are leaders in this field and have lawyers with both the technological skill to write the required code, while also understanding our business and our legal requirements.

Working with our external lawyers, we were able to map out the workflow process, logic and business rules that

would have previously been performed by our in-house lawyer when preparing new franchise pack contracts.

Within a few months, the end result was a bespoke webapp (managed and hosted by our external lawyers) that can be accessed by the required Clark Rubber staff members (including non-

Staff complete a guided online survey to gather all the necessary information relating to a new or renewing franchisee, with the system itself processing the defined business rules and legal rules (and providing useful guidance and instructions for staff). Once the data has been inputted into the system, the full suite of franchise pack contracts (including cover letter, signing checklist, franchise agreement, security agreements, disclosure document, key fact sheet, deed of guarantee, landlord deed of consent, confidentiality and noncomplete deeds, prior representation statement and statement by prospective franchisee) are automatically generated and available to download.

A process which previously required a full-time lawyer, can now be completed in less than 15 minutes by staff with no legal training.

Repetitive data (such as party names, addresses, ABNs, ACNs and contact details) only needs to be entered once (reducing the risk of typographical errors), the complete franchise pack is generated simultaneously (removing the risk that documents might be accidentally forgotten), and with the system generating all documents (the risk of accidentally using an old version is eliminated).

For Clark Rubber, the use of document automation has been a game changer for this part of our business, and I highly recommend that other franchisors investigate the possible uses for document automation within their businesses.

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About the CFE

CFE accreditation is a demonstration of a commitment to professional development and to reaching a recognised standard of excellence with the local and international franchise community

Access to the CFE program is a core member benefit and aims enhance the professionalism of franchising by certifying the highest standards of quality training and education. The CFE designation is presented annually at the FCA's National Franchise Convention to candidates who have completed all the CFE requirements.

CFE courses and online training

CFE credits and courses are available to FCA members by attending FCA events, at the FCA's annual National Franchise Convention and by attending CFE approved courses/programs.

The FCA approves training providers to deliver a range of programs which are approved towards the Certified Franchise Executive Program, including in-person, online and self-paced course offerings that support the running of a small business and franchise operation.

Just as your continuous professional development is vital to your ongoing personal and business growth and success. the FCA is committed to continuing to develop the CFE program to ensure it meets the training needs of the franchise

New training partners and programs are being assessed and added to the CFE program regularly and we would encourage you to find out more by visiting https:// franchise.org.au/education

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- Visit: www.franchise.org.au/education/
- Contact: jenny.boymal@franchise.org.au or (03) 9508 0888

CFE course providers

The FCA thanks the following training and professional development suppliers listed to the right for their support of the CFE program.



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