

# Franchisee Onboarding

Check when completed.



## Legal Documentation

- Sign the franchise agreement.
- Confirm that all mandatory business licenses and permits are obtained.
- Check if the required insurance coverage has been obtained.

## Training

- Training on operating procedures, products, and services.

## Location Setup

- Site selection.
- Lease agreement review and finalisation.
- Outlet: layout and design
- Renovation

## Equipment and Supplies

- Equipment and supplies procurement

## Staff Recruitment

- Job posting.
- Interview and screening.
- Prepare for training schedule.

### TreeAMS Pte Ltd

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**Address** #03-09 Wis@Changi Singapore 419718

www.treeams.com

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## Marketing

- Ensure all marketing materials and guidelines are available.
- Develop a pre-opening and grand opening marketing plan.
- Create social media channels.

## Opening

- Pre-opening marketing.
- Soft opening.
- Soft opening evaluations.
- Grand opening.

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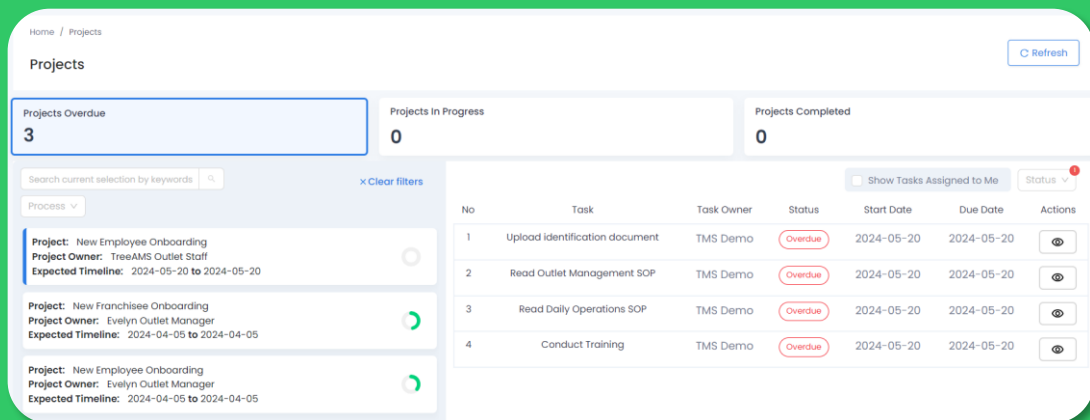
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# Thank you for downloading the **Franchisee Onboarding Checklist**

Now you have the **Franchisee Onboarding Checklist**, but why settle for the printed manuals or word document or unsafe shared drive?

How about storing your important checklist on **TreeAMS** that allows you to:

-  Digitalise the checklist and assign different team members according to their tasks.
-  Track progress of the checklist to see which task is still pending.
-  Trigger Audit, SOP, Training directly from this checklist.



The screenshot shows the TreeAMS Projects dashboard. At the top, there are three summary cards: 'Projects Overdue' with a count of 3, 'Projects In Progress' with a count of 0, and 'Projects Completed' with a count of 0. Below these is a search bar and a 'Clear filters' button. The main content is a table with the following data:

No	Task	Task Owner	Status	Start Date	Due Date	Actions
1	Upload identification document	TMS Demo	Overdue	2024-05-20	2024-05-20	
2	Read Outlet Management SOP	TMS Demo	Overdue	2024-05-20	2024-05-20	
3	Read Daily Operations SOP	TMS Demo	Overdue	2024-05-20	2024-05-20	
4	Conduct Training	TMS Demo	Overdue	2024-05-20	2024-05-20	

On the left side of the dashboard, there are three project cards, each with a circular progress indicator:

- Project:** New Employee Onboarding  
**Project Owner:** TreeAMS Outlet Staff  
**Expected Timeline:** 2024-05-20 to 2024-05-20
- Project:** New Franchisee Onboarding  
**Project Owner:** Evelyn Outlet Manager  
**Expected Timeline:** 2024-04-05 to 2024-04-05
- Project:** New Employee Onboarding  
**Project Owner:** Evelyn Outlet Manager  
**Expected Timeline:** 2024-04-05 to 2024-04-05

Ready to experience the future of franchise management?  
Click here to schedule your personalised demo!

[connect@treeams.com](mailto:connect@treeams.com)  
[www.treeams.com](http://www.treeams.com)



TreeAMS is a franchise management system designed to optimise franchise-wide performance through systematic Operations, Training, Audit and Onboarding implementation across multiple outlets and multiple territories.