



MUTUAL EXPECTATIONS

What should you be doing?

What will Click IT be doing?

“Every human relationship involves mutual expectations. Serious relationship problems often develop when these expectations are not clearly defined, understood, or fulfilled within the relationship.”

Bill J. Baker, Ph.D. Grayson & Associates

Business Formation

You will...

- ✓ pick the name of your business
- ✓ hire a lawyer and/or accountant as needed
- ✓ stay organized and review all the information Click IT provides
- ✓ set aside time to accomplish the tasks needed to be completed
- ✓ follow-through with all introductions to funding brokers and the realty team
- ✓ keep all scheduled meetings
- ✓ keep focused and positive, remembering that business formation is a step-by-step process

Click IT will...

- provide you with pertinent information to help you make good decisions
- help you with your business plan including starting a tasks list with you
- give you directions, instructions, and advice along the way with anything you're stuck on
- be a coach and the primary example to follow
- Remind you to cross your "t"s and dot your "i"s, so you know you're doing it correctly and in a timely manner

Location Selection



You will...

- ✓ not search for your store location, impatiently, alone, and without expertise
- ✓ work with our extremely experienced team of franchise location realty professionals who:
 - ❑ understand Click IT's location criteria
 - ❑ know commercial real estate landscape
 - ❑ have the tools necessary to find "pocket listings" and soon-to-be listed locations
- ✓ be asked to do location "walk-throughs"
- ✓ have weekly meetings with our realty group
- ✓ be guided by the principles and techniques taught
- ✓ be rewarded with immense financial savings

Click IT will...

- give you concise and clear directions and written instructions of the process and what's expected from you
- assist you with questions about the process and check location choices over and discuss them with you
- be proactive in working with our real estate team following the principles of their system, while encouraging you to do the same
- attend every realty meeting

Store Build-Out



You will...	Click IT will...
<ul style="list-style-type: none">✓ create a list of tasks that need to be completed, and check it each day, attend meetings, make decisions✓ get the RULES regarding store hours, signage, permits, etc., from the landlord/broker✓ hire the contractor(s) needed to build-out your store, including:<ul style="list-style-type: none">❑ carpentry, electrical, and flooring✓ find and purchase all build-out materials, furniture, fixtures, computer equipment & software✓ find and order all signage following Click IT's standards as provided in Store's Portal	<ul style="list-style-type: none">➤ provide all the information needed to build out your Click IT store, including plans, drawings and the list of items needed➤ assist in setting up your email service, your managed services and backup accounts, and all systems necessary to run your store➤ answer any questions you may have➤ meet with you once per week at a steady time for a review of the task list➤ give directions for what comes next, or what's been missed➤ assist with hiring, licensing, and permitting, as needed, aiding always through our knowledgebase

Marketing



You will...

- ✓ never be alone, not knowing what to do, or what works and what doesn't
- ✓ be introduced to our **Marketing Team** who will:
 - ❑ examine the market area
 - ❑ develop your marketing plan
 - ❑ provide a written proposal
- ✓ be given access to Click IT Prospector with helpful software, call scripts and search tools to find new customers easily
- ✓ be introduced to our **all Click IT Resources**
 - ✓ providing optional marketing strategies

Click IT will...

- continue to work ongoingly with our professional marketing team
- approve newly submitted marketing strategies, and proposals in a timely manner
- provide all marketing information in outline form
- in our franchise rule documents, provide standardized answer to most questions
- be receptive to all new ideas or tactics proposed by you, always respectful and responsible to the greater good

Sales



You will...

To the Local Community:

- ✓ walk around and introduce yourself and your store's opening plans with neighborhood merchants and business owners
- ✓ stay inside your lane of services, solutions and products offered, being careful not to step on your neighbors' toes

To the Greater Community:

- ✓ wait until planned launch day before announcing business
- ✓ work with suppliers helping to build loyalty and awareness
- ✓ attend schedule meetings, such as radio interviews, made by marketing planners
- ✓ be the final decision maker, negotiating all fees and payments, and sign all agreed to contract made by the marketing, advertising and sales team

Click IT will...

- make sure you have all our tools and tactics:
 - from 10 years as a Click IT store
 - in a small community
 - provided at Click IT Prospector
- help you with sales scripts and methods we've used, or find has worked to build "buzz"
- build an area map showing what businesses surround your location, so you can easily contact them and introduce Click IT personally
- constantly monitor how you're doing through viewing sales reports, and offer ways to improve

Accounting

You will...	Click IT will...
<ul style="list-style-type: none">✓ kick off the accounting tasks ahead in a meeting with our Accounting Team✓ choose your accountant (must be a Certified QuickBooks Pro Advisor)✓ open an Online QuickBooks account with help from your accountant✓ open a QuickBooks/Woocommerce synchronization✓ provide whatever information is needed, as needed:<ul style="list-style-type: none">✓ <i>company name, location address & phone number</i>✓ <i>purchases made for the business in receipts</i>✓ <i>accounting payables</i>✓ <i>bank account and credit card information</i>✓ <i>be readily available for your accountant when and if any additional question arise</i>	<ul style="list-style-type: none">➤ schedule the kick-off meeting➤ introduce you to our accounting team, consisting of our bookkeeper, and accountants we work with for your choosing➤ provide a standard Chart of Accounts and the Items list➤ connect the synching software from your company store to the Woocommerce shopping cart, which serves as your POS

Training



You will...

- ✓ **At Click IT Headquarters...**
 - ❑ attend three days on intense classroom and in-store training
 - ❑ see every aspect necessary in running a Click IT store
 - ❑ meet our entire staff, and take good notes
 - ❑ learn how to operate our backend systems
 - ❑ be able to ask any questions, and get all the answers to any questions asked
 - ❑ better understand how your store will look after your buildout is complete, using all and any information digested and observed

Click IT will...

- provide thorough classroom training
- give you access to all sites & materials needed to complete training and to reference later
- get you signed up to our knowledgebase
- test your retained knowledge
 - ❑ resulting in your receiving a “**Certificate of Completion**”, required by the SBA
- make sure all information is provided and all questions are answered as training is conducted

Systems



You will...

- ✓ Learn all the systems we implement and teach that's needed to operate your store
- ✓ Understand how to train your staff to operate the systems used to run your store
- ✓ Register and log into all Click IT web portals and understand their purposes
- ✓ Have clear objectives and goals to achieve everyday
- ✓ Say goodbye to procrastination and be positive everyday by reminding yourself that opening your new business is a process and will take time, but eventually you will succeed and your friends and family will be impressed that your persistence has paid off.

Click IT will...

- Provide you with links and information to purchase all the systems needed to run your Click IT store.
- Provide a list of all systems needed to run your store and keep you updated with periodic information of improvements, changes and developments regarding any approved systems and vendors.
- Help you sign up with all suppliers and log into their portals training.



Franchise Onboarding Process



Yash Yagnik
*Digital Media
Manager*



- **Al Harlow**
- *Founder,
President
& CEO*



- **Chris Fredrickson**
- *Vice President*
- *Store Operations*



- **Robert Rosenfeld, Esq.**
- *Executive V.P.*
- *Legal Affairs*



Scott Simcik
*Commercial
Leasing*



Gary Raffensberger
Funding



Jay Longwell
Marketing



Tasks Left to Receive an Invitation to Become a Click IT Store Owner

- All Managed in the Member's Portal

<input checked="" type="checkbox"/> Return Request for Consideration Form	<input checked="" type="checkbox"/> Take Personality Traits Test	<input checked="" type="checkbox"/> Register at Member's Portal as a Franchise Candidate	<input checked="" type="checkbox"/> Complete & Return the NDA / Confidentiality Agreement	<input checked="" type="checkbox"/> Get Pre-Qualified for Funding & Speak to Broker
<input type="checkbox"/> Complete Our Advanced Application Form	<input checked="" type="checkbox"/> Complete the Concept Compatibility Online Meeting with AI	<input checked="" type="checkbox"/> Complete Day-In-The-Life Call with Chris. Operations Manager	<input checked="" type="checkbox"/> Complete Mutual Expectations & Start-up Online Meeting with AI	<input type="checkbox"/> Complete FDD / FA Pre and Post Review Meetings with AI & Bob

<https://members.clickitfranchise.com>

Next Steps

You will...

- Continue Work on Completing Steps: [Click Here](#)
- Fill Out Funding Form: [Click Here](#)
- Start **New Franchise Owners Onboarding Form**: [Click Here](#)

Click IT will...

- **Encourage and Move the Process Along**
- **Alert Team Members of a Potential New Franchise Owner**
 - Write Emails, make Phone Calls, and Schedule
 - Initial Kick-off Meetings:
 - Business Planning
 - Real Estate - Scott Simcik -
 - Marketing - Jay Longwell