

FRANCHISE SALE CHECKLIST

SELLER 6 _____

BUYER 6 _____

NEW FRANCHISE – Y / N

TRANSFER DATE: _____ @ _____

SELLER DETAILS		
COMPANY NAME		
FRANCHISE ABN		
DIRECTOR (1) NAME	First name _____ Surname _____	FRANCHISE AGREEMENT DATE
EMAIL	PHONE	
ADDRESS		
Suburb	State	Postcode
DIRECTOR (2) NAME	First name _____ Surname _____	
EMAIL	PHONE	
ADDRESS		
Suburb	State	Postcode
BUYER DETAILS		
REFER TO AGREEMENT SIGNING DOCUMENT		
CHECKLIST – PRIOR TO TRANSFER MEETING		
COPY OF PURCHASE AGREEMENT RECEIVED Must contain: <input type="checkbox"/> Purchase Price <input type="checkbox"/> Purchase Date <input type="checkbox"/> Seller Details <input type="checkbox"/> Buyer Details <input type="checkbox"/> Proposed date of transfer <input type="checkbox"/> Contracts included <input type="checkbox"/> Signatures	TRANSFER FEE <ul style="list-style-type: none"> • Must be paid prior to meeting • Refer to original Agreement to calculate transfer fee – invoice the Seller Invoice #: _____ Amount: _____ +GST Date Paid: _____ / _____ / _____ Method: <input type="checkbox"/> Bank cheque <input type="checkbox"/> EFT <input type="checkbox"/> Card <input type="checkbox"/> Cash	
DEED OF SURRENDER C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\Franchise Transfer <input type="checkbox"/> Prepare for <u>Seller to sign</u> ** Same day as Buyer Franchise Agreement (if buyer is existing franchisee, must still attend surrender appoint.) <input type="checkbox"/> Deed of Surrender Signed _____ / _____ / _____	NEXT STEPS <input type="checkbox"/> Ensure Seller Agreement is active <input type="checkbox"/> Ensure Buyer has purchased Disclosure <input type="checkbox"/> If buyer is New Franchisee – Proceed to Agreement Checklist <input type="checkbox"/> If buyer is Existing Franchisee - proceed to contract transfers	

AGREEMENT SIGNING

6 ____

<input type="checkbox"/> TRANSFER from 6 ____		APPOINTMENT DATE	TIME
PARTNER 1			
GIVEN NAME(S)			
SURNAME		ABN SOLE TRADER	
EMAIL		PHONE	
ADDRESS			
Suburb		State	Postcode
PARTNER 2			
GIVEN NAME(S)			
SURNAME		ABN SOLE TRADER	
EMAIL		PHONE	
ADDRESS			
Suburb		State	Postcode
TERMS		SPECIAL CONDITIONS	
Term remaining	Yrs	Mths	
Further terms			
EMAILS & BOOKINGS			
1	Email franchisee per template "New Franchise - Documents" with included attachments "ID" and "Information Statement" <i>Note: Allow for 2 WEEK cooling off period from initial Disclosure Document purchase</i>		
2	Book Salesforce Calendar slot for rep - TB / AC or JK (if others unavailable)		
3	Book Outlook calendar invite for franchisee, rep and Emirates		
ENSURE ITEMS RECEIVED AT LEAST 2 BUSINESS DAYS PRIOR TO MEETING			
4	100 Points of ID		
5	ABN – Sole Trader		
6	Police Clearance		
7	Payment Receipt if EFT or confirmation of Bank Cheque at meeting (usually paid by seller)		
DOCUMENT PREP			
8	Assign a Franchise Number (*check Business Name Availability through ASIC)		
9	C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\Franchise New - Doc Templates\New Franchise Prep Docs Franchise Agreement 2024 – Combined Fill Pages: 115, 165, 166, 167, 168, 169, 175, 176, 177, 178, 179, 181, 183, 190, 191, 192, 308 Sign Pages: 2, 76, 115, 165, 166, 167-169 (initial), 175, 176, 177, 178, 179, 190, 191, 308 Print 2 copies (100 – Stephen Coade??)		
	SEE GUIDE OVERLEAF >>		

Digital Page No.	Print Page No.	Sign	Fill
2	2	VS	
76	76	VS & TB	
115	115	VS OR TB	Y
165	47	VS OR TB & FRA1 & W	Y
166	48	FRA2 & W	Y
167	45	ALL INITIAL	Y
168	46	ALL INITIAL	Y
169	47	ALL INITIAL	Y
175	53	FRA1 & FRA2 & W	Y
176		FRA1	Y
177		FRA1 & ALL INITIAL	Y
178		FRA1 & ALL INITIAL	Y
179		FRA1 & ALL INITIAL	Y
180		IF APPLICABLE	IF REQUIRED
181			Y
183			Y
190		VS OR TB & FRA1 & W	Y
191		FRA2 & W	Y
192			Y
308	121	FRA1 & FRA2	Y

10	<p>C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\Franchise New - Doc Templates\New Franchise Prep Docs</p> <p>AMC_Franchise Agreement Inserts_editable</p> <p>Pages: 1 (Colour) Pages: 2-5 (Black & White)</p> <p>Print 2 copies on Gloss Card</p>	
11	Bind all 3 sections Tabs for signing	
12	VS / TB to sign before meeting	<p><i>Note: If TB conducting meeting and signing as party to agreement, third party to witness</i></p>
13	<p>Print “New Franchisee Starter Pack”</p> <p>C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\Franchise New - Doc Templates - New Franchise Starter Pack - Editable</p> <ol style="list-style-type: none"> 1. Enter Franchise Number on P1 2. Print on AMC red backing letterhead 	

14	<p>Franchise Sale Application checklist C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\Franchise Transfer – Franchise Sale Pricing - Transfer</p> <p>Copy to Franchisee Folder Complete and Save in Folder with Fra Number extension</p>	
15	Request invoice from Lachlan for Seller or Buyer, whichever is paying transfer fee	
16	Add invoice number(s) to Franchise Sale Pricing – Transfer Document if available	
17	Print Franchise Sale Pricing – Transfer Document	
GIFT BAG		
18	<ul style="list-style-type: none"> - Box - Next steps / Get set up flyer 	
POST APPOINTMENT		
19	Get Set Up Email “New Franchise - Next Steps”	
20	Scan the following pages of the Signed Franchise Agreement Section: AGREEMENT Part 2 of 3 From <u>A) SIGNING CLAUSES</u> page to <u>end of section</u>	
21	Save Signed Agreement to Franchise File / Legal	

See TRAINING DAY next page

TRAINING DAY

6 — — —

NAME:	DATE:	TIME:
COMPANY ABN:		

CONFIRM RECEIPT OF DOCS		
1	New Company Registration	
2	New Company ABN	
3	GST Registration	
4	Business Bank Account	
5	Public Liability AMC (Yes or No)	
EMAILS & BOOKINGS		
6	Email franchisee per template “Training Day – FRAxxxx”	
	<i>Note: 1 week cooling off from Agreement signing</i>	
7	Book calendar invite for franchisee and JK	
THE GOODS		
8	Email The Goods per template “New Franchisee Training - The Goods (6xxx)”	
TRAINING MATERIALS		
9	Print training manual (double sided – colour) (Z:\BUSINESS_OPERATIONS\ARCHIVE\TRAINING\FRANCHISEE TRAINING\NEW FRANCHISEE TRAINING MANUAL\New_2015_2016) • BINDER_AMC Franchisee Manual	
10	A4 Training binder – assemble Training Manual Binder AMC Franchisee Manual	
11	Print The Goods Cover Page (Z:\GENERAL\The Goods\Price List 2024) Consumables Price List Cover 2024	
12	Print The Goods Price List (Z:\GENERAL\The Goods\Price List 2024) The Goods - AMC Updated Price List July 2024	
13	Print Consumables Invoice Instructions (Z:\BUSINESS_OPERATIONS\ARCHIVE\TRAINING\FRANCHISEE TRAINING\NEW FRANCHISEE TRAINING MANUAL\New_2015_2016) Raising Consumables Invoices A4 flyer	
14	Make The Goods bound copy – Cover Page + Updated Price List + Raising Invoices A4	

15	Print Attendance Record (C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\New Franchise Doc Templates) Attendance Sheet	
CATERING		
16	Order Gourmet Sandwich Platter for Miss Maud or Subway alternative (locate login) Vegetarian or per franchisee special requirements	
17	Purchase/order drink selection if required - OJ & Coke	
DEED OF ASSIGNMENT		
18	Produce Deed of Assignment document Sole Trader to Company C:\Users\reception.wa\OneDrive - JSFT Enterprises Pty Ltd\Desktop\NN Temp Doc repository\Franchisee\New Franchise Doc Templates Deed of Assignment of Franchise Agreement ABN to ACN	
19	Save in - Z:\SALES_AND_MARKETING\FRANCHISEES\FRANCHISEE FILES\<insert franchisee #>\LEGAL	
20	Print 2 copies Photocopy x 2 "Agreement" pages & attach to Deed Tabs to sign	
ADD FRANCHISEE TO FAS		
21	Add new Franchisee to FAS and include any special conditions in Comments section	
22	Send all Docs to Head Office per template "New Franchisee Set Up"	
23	Create Contracts - Master Files / Contracts / Add New Create " franchisee " contract like other AMC Commercial Cleaning (WA) Pty Ltd in the search	
24	Add any Special Conditions deduction schedules	
ADD USER TO FAS		
25	Add new User to FAS - Administration / Users / Add New set PW as: First and Last initial (caps) & amc (lower case) & ! e.g. NNamc6232!	
26	Send username credentials to franchisee per template "Welcome to FAS"	
WELCOME EMAILS FRANCHISEE		
27	Business Cards – New Franchise	
28	Raising Consumables Invoices	
29	New Cleaner Onboarding Process	
30	Systems Onboarding	
ADD FRANCHISEE TO EF		
31	Need franchise #, name, email, address, level purchased	
ADD USER TO ALTORA		
32	Create Franchisee Altora Profile (if FRA # not listed, email Ellie Barr ellie.barr@amcclean.com.au to add.	

ON TRAINING DAY		
33	Provide 2 x Shirt and 1 x ID free (per franchisee) Note: Additional IDs & Shirts for whoever attends and requires these items – charge accordingly	
34	Provide 1 x Training Manual to the Franchisee	
35	Provide 1 x The Goods price list	
36	Sign 2 x Deed of Assignment updated	
37	Send new Franchisee details to Ops Team per template "New Franchise 6xxx Introduction"	
POST TRAINING		
38	Scan Deed of Assignment - Save to Franchisee Z: folder	
39	Update SF Lead Status	
40	Order business cards (if required) – refer to details email confirmation Save PDF proof to Z: folder	
41	Transfer Contracts from Buyer to Seller	
42	Deactivate Old Franchise once all items settled	