

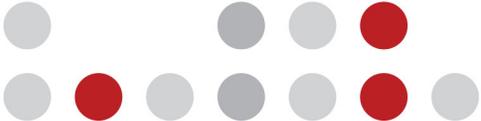
Molly Wally's

Franchisee Satisfaction Report | March 2023



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About FBR

Franchise Business Review (FBR) is the leading market research firm in the franchise sector specializing in satisfaction and business performance. Since 2005, we have worked with over 1,200 leading franchise brands.

Our mission is simple:

We gather actionable insights from your key stakeholders – your franchisees, your employees, your candidates, and your customers – and we put those insights to work to help you build a stronger, more successful company.

For us, **driving better results** is much more than a tagline. It's about helping the very best franchise companies achieve greater success.

Franchise Business Review
155 Brewery Lane, Suite 201
Portsmouth, New Hampshire 03801
603.433.2270 | www.GoFBR.com

Introduction

Overview of Project

Franchise Business Review (FBR) recently completed a franchisee satisfaction benchmark project with **Molly Wally's**. Our research was completed in March 2023 with all current franchisees (**69**) being contacted by email and asked to complete a detailed satisfaction survey and **31** franchisees (**45%**) completed the survey.

FBR's standard satisfaction survey asks 33 benchmark questions across eight primary areas: Training & Support, Franchise System, Leadership, Core Values, Franchisee Community, Franchisee Self-Evaluation, Financial Opportunity, and General Satisfaction. The survey also asks franchisees several market information, business lifestyle, and demographic questions.

Scoring and Analysis

Franchisee Satisfaction Index (FSI)

Each question receives a Franchisee Satisfaction Index (FSI)™ score, which is a weighted average of the responses given to each 5-point scale question. Individual answers are given a score of 100, 75, 50, 25, or 0 across the range from most positive to the least positive response choice. FSI scores can range from 0-100 points. Generally speaking, an FSI score above 70 is considered above average, 60-70 is average, and lower than a 60 is below average. That said, FSI scores can vary significantly from question to question.

FSI Benchmarking

All standard FBR survey questions were benchmarked to a custom **2023 FBR Benchmark** containing data from a select group of **357** brands. This benchmark includes current data from over **38,560** franchisees representing more than **158,485** locations.

Overview

Overall FSI Score



45%
participation

31 out of 69 invited franchisees took part in the survey.



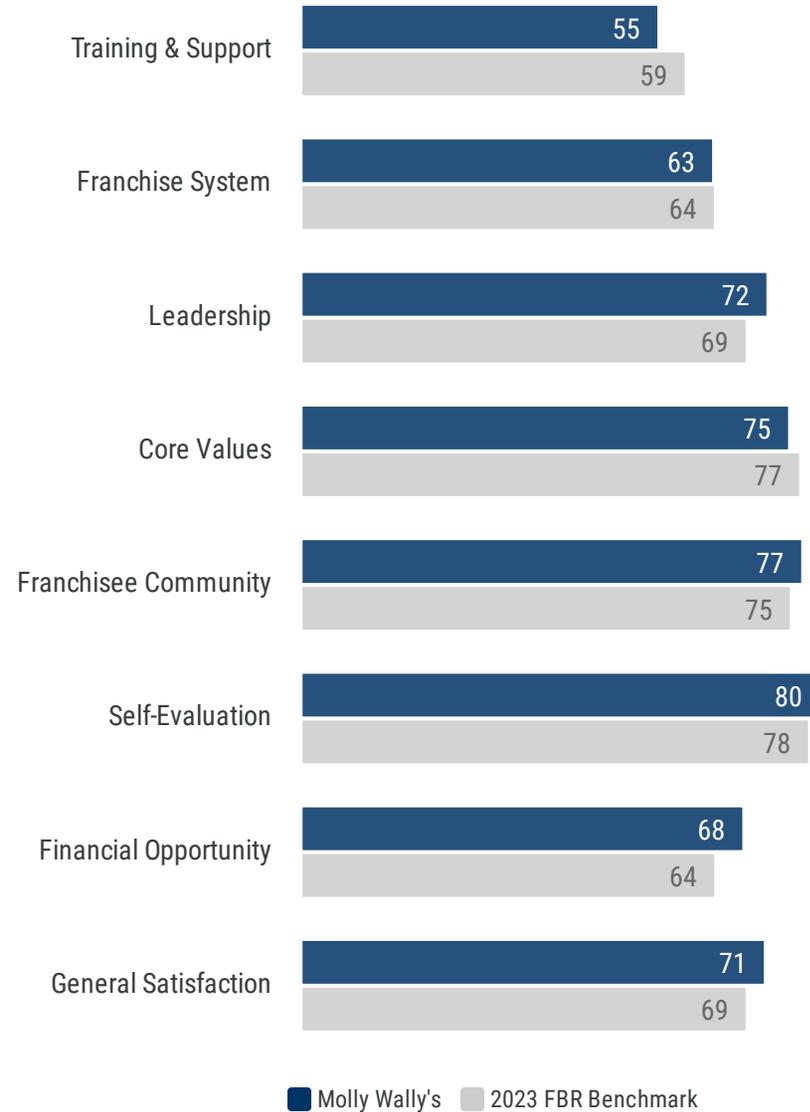
1%
above average

Your overall score is 1% above the average 69 FSI. Of the 357 brands in the benchmark, FSI scores range from 38 to 95.



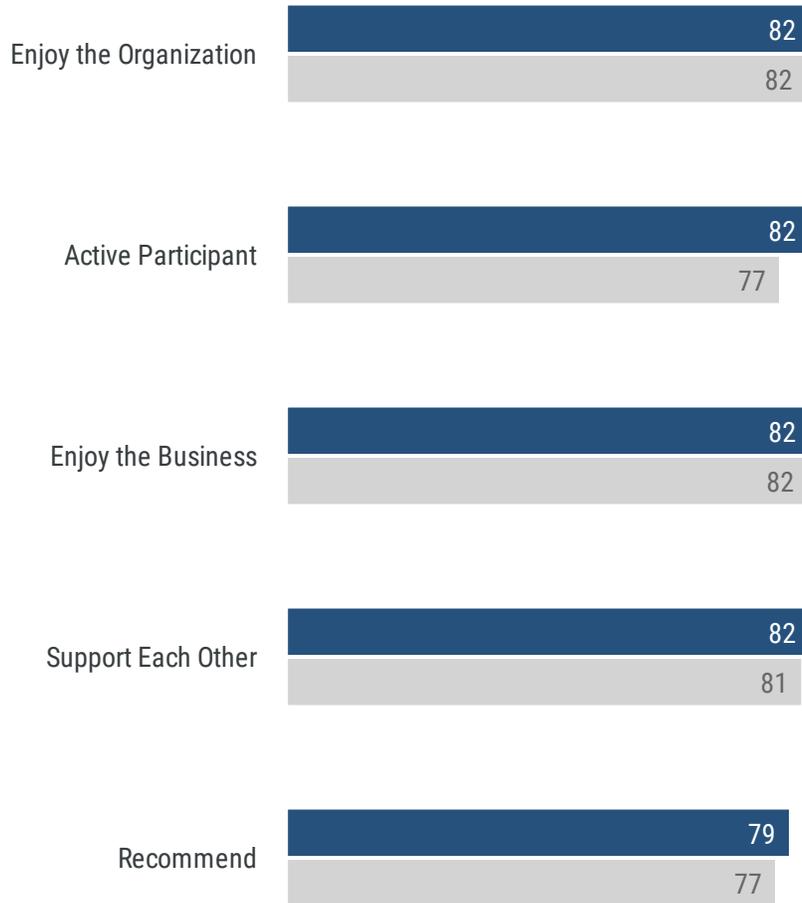
75th
percentile

Your score is in the 3rd quartile of 2023 FBR Benchmark.

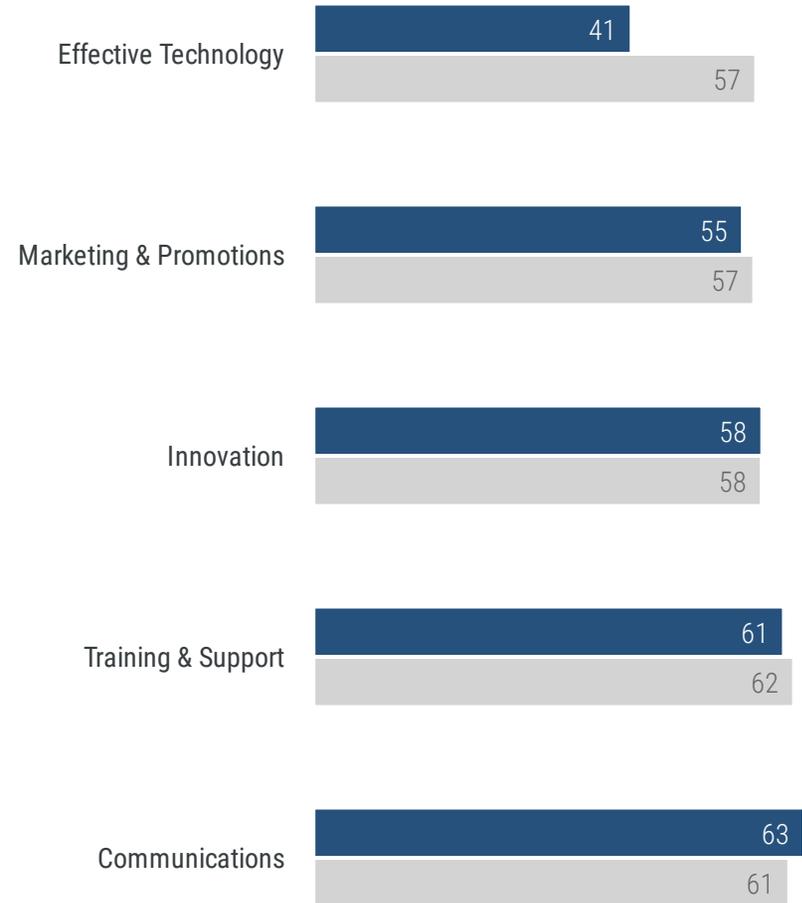


Highest / Lowest Rated Areas

Highest Rated Questions



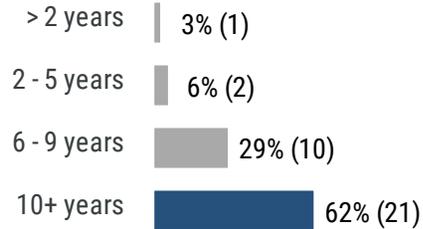
Lowest Rated Questions



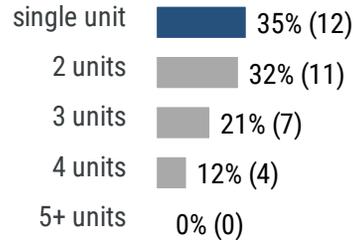
■ Molly Wally's ■ 2023 FBR Benchmark

Franchisee Demographics

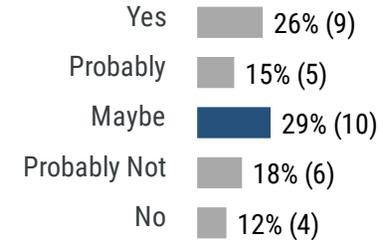
Tenure



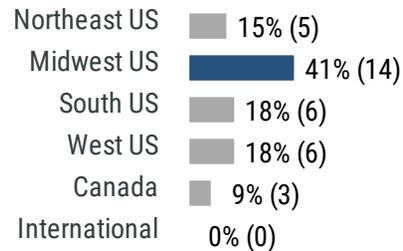
Units Owned



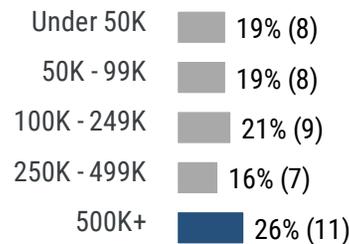
Future Development Plans



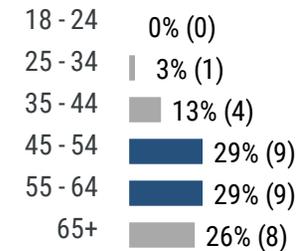
Location



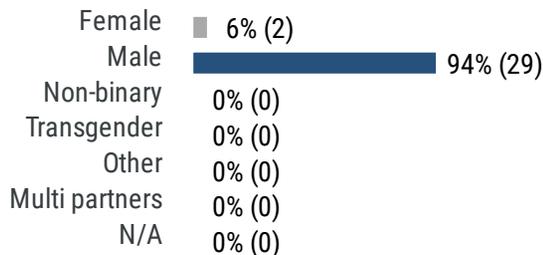
Market Size by Population



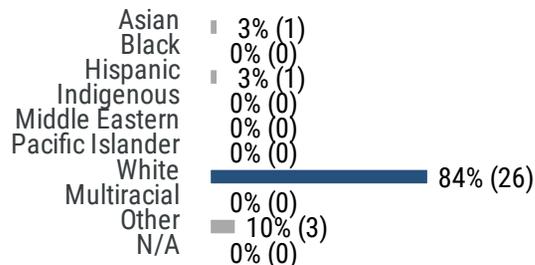
Age Group



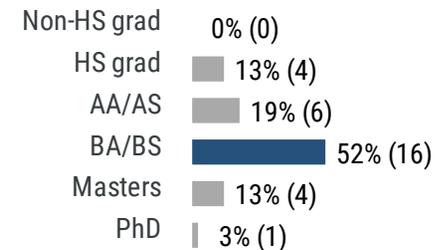
Gender



Race



Education



Training & Support

	SCORE	BHMK	VAR	LAST	TREND
Training & Support (n=33) 	61	62	-1	44	+17
Marketing & Promotions (n=33) 	55	57	-2	41	+14
Effective Technology (n=33) 	41	57	-16	42	-1
Communications (n=32) 	63	61	+2	43	+20

Franchise System

	SCORE	BHMK	VAR	LAST	TREND
Ops & Systems (n=32)	63	62	+1	63	0
Products & Services (n=32)	68	68	0	75	-7
Competition (n=32)	65	68	-3	47	+18
Innovation (n=32)	58	58	0	58	0

Leadership

	SCORE	BHMK	VAR	LAST	TREND
<p>Clear Vision (n=31)</p>	73	73	0	61	+12
<p>Team Culture (n=32)</p>	79	74	+5	66	+13
<p>Involves Franchisees (n=32)</p>	66	58	+8	57	+9
<p>Effective in Driving (n=32)</p>	70	70	0	61	+9

Core Values

	SCORE	BHMK	VAR	LAST	TREND
Trust (n=31)	73	75	-2	64	+9
Respect (n=31)	79	80	-1	74	+5
Honesty & Integrity (n=31)	76	78	-2	70	+6
Cares About My Success (n=31)	73	76	-3	67	+6

Franchisee Community

	SCORE	BHMK	VAR	LAST	TREND
Support Brand (n=31)	77	79	-2	73	+4
Support Management (n=31)	73	70	+3	61	+12
Support Each Other (n=31)	82	81	+1	78	+4
Active Community (n=31)	77	72	+5	73	+4

Self-Evaluation

	SCORE	BHMK	VAR	LAST	TREND
Enjoy the Business (n=31)	82	82	0	83	-1
Enjoy the Organization (n=31)	82	82	0	82	0
Active Participant (n=31)	82	77	+5	73	+9
Valued Member (n=31)	73	72	+1	64	+9

Financial Opportunity

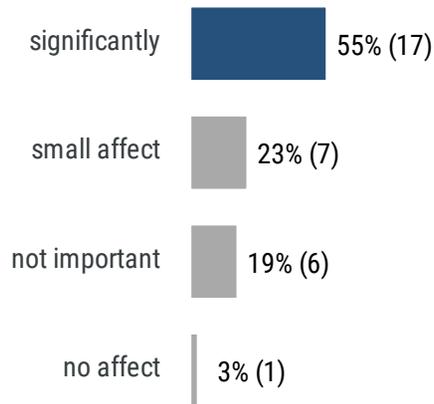
	SCORE	BHMK	VAR	LAST	TREND
Fees (n=31)	64	60	+4	65	-1
Total Investment (n=31)	68	63	+5	59	+9
Financial Picture (n=31)	69	61	+8	61	+8
Long-Term Growth (n=31)	72	71	+1	69	+3

General Satisfaction

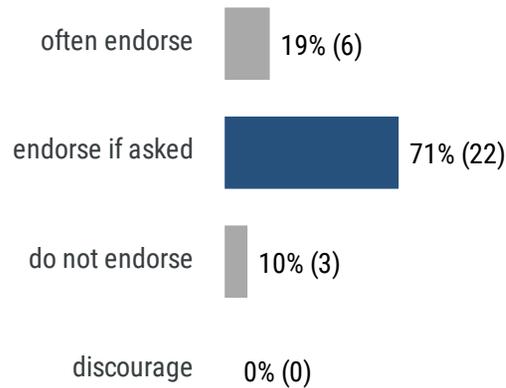
	SCORE	BHMK	VAR	LAST	TREND
Overall Opportunity (n=31)	69	66	+3	56	+13
My Overall Performance (n=31)	72	63	+9	68	+4
Overall Satisfaction (n=31)	65	64	+1	57	+8
Do It Again (n=31)	73	74	-1	74	-1
Recommend (n=31)	79	77	+2	74	+5

Additional Questions

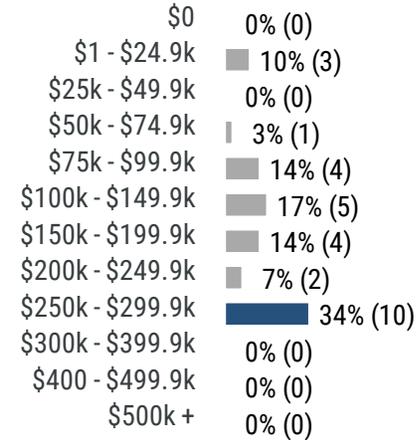
How your business affects the franchise success?



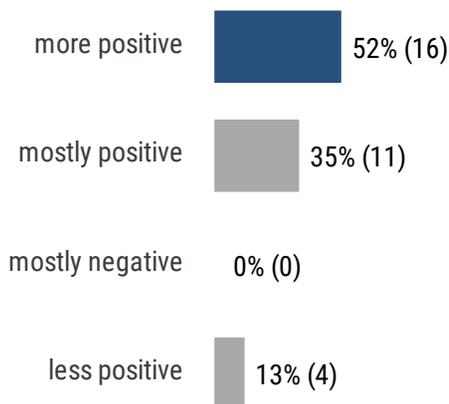
Discussing franchise with others:



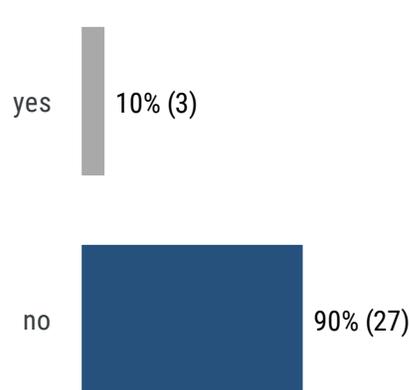
Pre-Tax Income:



How has your attitude changed?



Are you a Military Veteran?



Individual Scorecards

Overall FSI Score



Gertrude Beer

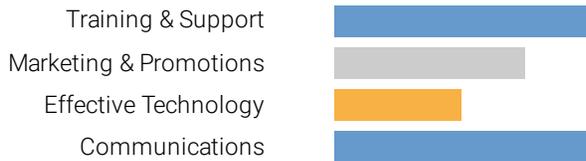
Lake Savannahborough, NJ

Tenure: 2 - 5 years

Outlets: single unit / territory

Training & Support

0 25 50 75 100



Leadership



Franchisee Community

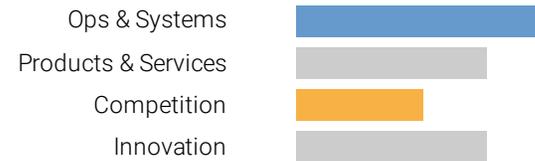


Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Gertrude Beer

Lake Savannahborough, NJ

Tenure: 2 - 5 years

Outlets: single unit / territory

Discussing franchise with others:

I frequently and proactively recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Gabriel Brown

East Johanna, VT

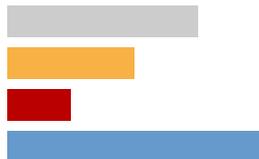
Tenure: 10+ years

Outlets: 2 units / territories

Training & Support

0 25 50 75 100

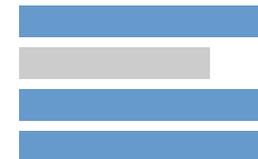
Training & Support
Marketing & Promotions
Effective Technology
Communications



Franchise System

0 25 50 75 100

Ops & Systems
Products & Services
Competition
Innovation



Leadership

Clear Vision
Team Culture
Involves Franchisees
Effective in Driving



Core Values

Trust
Respect
Honesty & Integrity
Cares About My Success



Franchisee Community

Support Brand
Support Management
Support Each Other
Active Community



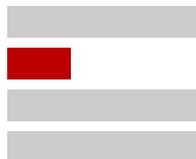
Self-Evaluation

Enjoy the Business
Enjoy the Organization
Active Participant
Valued Member



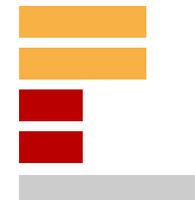
Financial Opportunity

Fees
Total Investment
Financial Picture
Long-Term Growth



General Satisfaction

Overall Opportunity
My Overall Performance
Overall Satisfaction
Do It Again
Recommend



Individual Scorecards

Overall FSI Score



Gabriel Brown

East Johanna, VT

Tenure: 10+ years

Outlets: 2 units / territories

Training, Support, Marketing

Too many training tools. Need to get rid of Molly Wally's net, focus Molly Wally's training.com on essential tools and make it easier to navigate (simplify verbiage, group by things like orientation, first day, etc). We have never had a strong marketing effort. Technology-we are upgrading pos to because our systems are obsolete. We should have simple information tools that have been available for 20 years or more. I had better technology in another concept in 2006. I know this takes time but this is where we are today. I will say that the 3rd party integration was a huge step forward. Best thing we have done in years.

If you could make one recommendation to Senior Management, what would it be?

Partner with a capital provider you allow easy access to capital fir new stores and remodels. This will propel the concept forward exponentially. And continue to focus on reducing new store cost.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Devin Conroy

South Marievew, NY

Tenure: 6 - 9 years

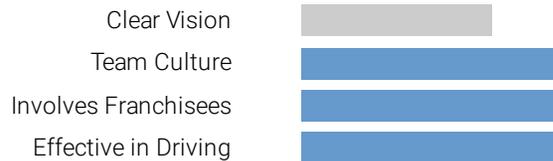
Outlets: single unit / territory

Training & Support

0 25 50 75 100



Leadership



Franchisee Community

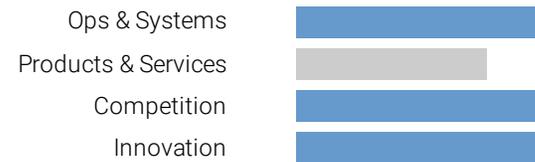


Financial Opportunity



Franchise System

0 25 50 75 100



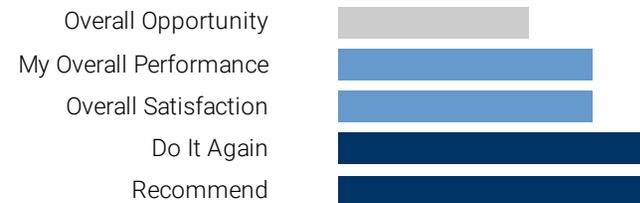
Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Devin Conroy

South Marievew, NY

Tenure: 6 - 9 years

Outlets: single unit / territory

Training, Support, Marketing

45-60 minutes to train employees for each promo is too long. New FBC wasn't responsive to emails and Franchise VP wasn't either. It seems to be getting better but in all the transition over the 2020 summer there was some frustration with the communication.

Competition, Products/Services, Creativity

We need to be able to provide free offers to our guest. Free chips and queso for your first online order. New salsa came out in Oct.2020 and we should be offering free chips and salsa to guest to try the new (amazing) roasted tomato salsa. We could do monthly challenges for rewards customers. Come in 4 times in the month of November and receive 2000 bonus points etc... the GDR process is a pain and cumbersome. Takes too long.. need editable generic GDRs we can easily edit and use. The LRM tool is broken. Would be great if Adrienne would offer a quarterly webinar about marketing....lunch and learn session

If you could make one recommendation to Senior Management, what would it be?

State of the business is nice, continue to do these quarterly.

Please give any constructive feedback you have related to your Franchisee Community:

FBC needs to have quarterly zoom meetings with regional franchisees to go over challenges, best practices, successes etc...

Financial Opportunity

No where to grow even though I'm doing well.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Santa Crist

South Mertie, LA

Tenure: 10+ years

Outlets: 3 units / territories

Training & Support

0 25 50 75 100



Leadership



Franchisee Community

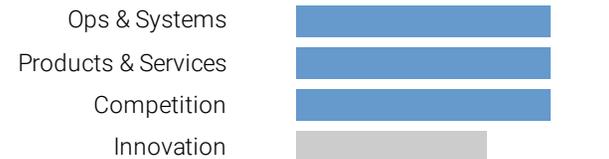


Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Santa Crist

South Mertie, LA

Tenure: 10+ years

Outlets: 3 units / territories

Financial Opportunity

There is a feeling of being nickel and dime by all the fees and charges with a visual positive return on investment. The pace and communication add to this feeling.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Collin Feil

North Donaldshire, KY

Tenure: 10+ years

Outlets: 4 units / territories

Training & Support

0 25 50 75 100

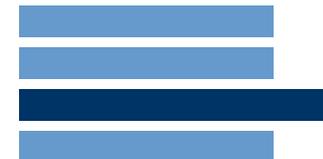
Training & Support
Marketing & Promotions
Effective Technology
Communications



Franchise System

0 25 50 75 100

Ops & Systems
Products & Services
Competition
Innovation



Leadership

Clear Vision
Team Culture
Involves Franchisees
Effective in Driving



Core Values

Trust
Respect
Honesty & Integrity
Cares About My Success



Franchisee Community

Support Brand
Support Management
Support Each Other
Active Community



Self-Evaluation

Enjoy the Business
Enjoy the Organization
Active Participant
Valued Member



Financial Opportunity

Fees
Total Investment
Financial Picture
Long-Term Growth



General Satisfaction

Overall Opportunity
My Overall Performance
Overall Satisfaction
Do It Again
Recommend



Individual Scorecards

Overall FSI Score



Collin Feil

North Donaldshire, KY

Tenure: 10+ years

Outlets: 4 units / territories

Competition, Products/Services, Creativity

Would like to see more incentives for franchisees to grow store count

If you could make one recommendation to Senior Management, what would it be?

Making huge gains in the last year. Keith has surrounded himself with a very strong team.

Please give any constructive feedback you have related to your franchisor's

Core Values:

Good partnership that they work very hard to cultivate

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Tanya Franecki

Port Benton, NE

Tenure: 10+ years

Outlets: 2 units / territories

Training & Support

0 25 50 75 100



Leadership



Franchisee Community

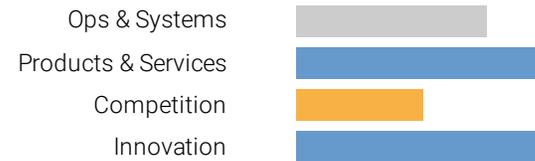


Financial Opportunity

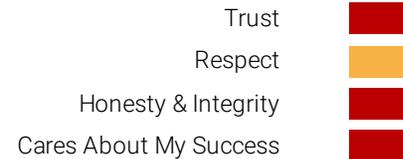


Franchise System

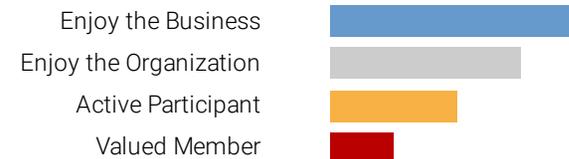
0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Tanya Franecki

Port Benton, NE

Tenure: 10+ years

Outlets: 2 units / territories

Discussing franchise with others:

I do not recommend the franchise system when asked

Individual Scorecards

Overall FSI Score



Sallie Glover

Lake Preciousbury, AL

Tenure: 10+ years

Outlets: single unit / territory

Training & Support

0 25 50 75 100



Leadership



Franchisee Community

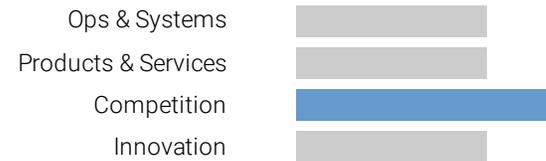


Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Sallie Glover

Lake Preciousbury, AL

Tenure: 10+ years

Outlets: single unit / territory

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Erna Gusikowski

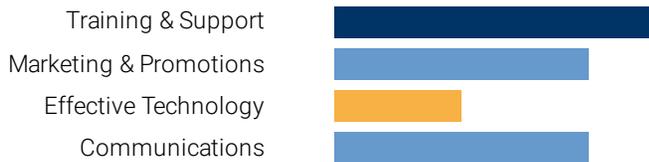
Peggiefort, IL

Tenure: 10+ years

Outlets: 4 units / territories

Training & Support

0 25 50 75 100



Leadership



Franchisee Community

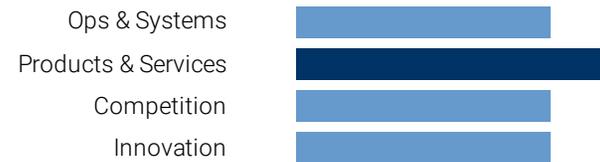


Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Erna Gusikowski

Peggiefort, IL

Tenure: 10+ years

Outlets: 4 units / territories

Training, Support, Marketing

love the hybrid approach as well as the Molly Wally's Recipe and use of hospitality pillars.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Estelle Hessel

Langworthstad, CT

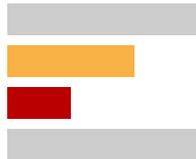
Tenure: 10+ years

Outlets: 2 units / territories

Training & Support

0 25 50 75 100

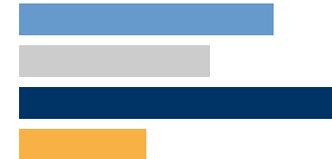
- Training & Support
- Marketing & Promotions
- Effective Technology
- Communications



Franchise System

0 25 50 75 100

- Ops & Systems
- Products & Services
- Competition
- Innovation



Leadership

- Clear Vision
- Team Culture
- Involves Franchisees
- Effective in Driving



Core Values

- Trust
- Respect
- Honesty & Integrity
- Cares About My Success



Franchisee Community

- Support Brand
- Support Management
- Support Each Other
- Active Community



Self-Evaluation

- Enjoy the Business
- Enjoy the Organization
- Active Participant
- Valued Member



Financial Opportunity

- Fees
- Total Investment
- Financial Picture
- Long-Term Growth



General Satisfaction

- Overall Opportunity
- My Overall Performance
- Overall Satisfaction
- Do It Again
- Recommend



Individual Scorecards

Overall FSI Score



Estelle Hessel

Langworthstad, CT

Tenure: 10+ years

Outlets: 2 units / territories

Training, Support, Marketing

Molly Wally's is far behind on technology, especially in the back of house and POS systems. Reporting tools in share point are a mess and the franchisee must go to multiple sources to get performance data. Everything needs to be accessed from one portal.

If you could make one recommendation to Senior Management, what would it be?

Don't wait for the franchise association to put together a meeting. Molly Wally's Corp needs to have regular business meetings with the franchisees and corporate operation.

Financial Opportunity

The billing of fees and the Reimbursement payment of gift cards is in disarray and I feel that it's not going to be resolved. Costs for support have risen dramatically.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Kieran Hettinger

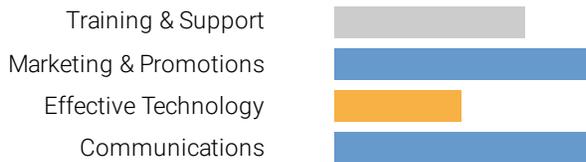
Lake Geovannytown, TN

Tenure: 10+ years

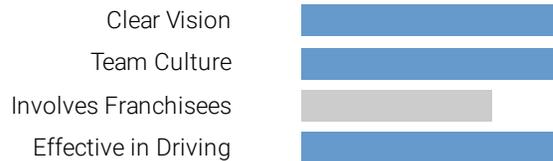
Outlets: 2 units / territories

Training & Support

0 25 50 75 100



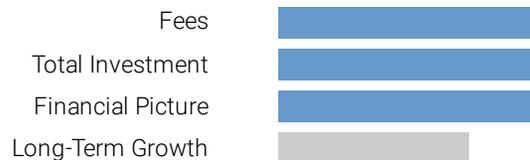
Leadership



Franchisee Community

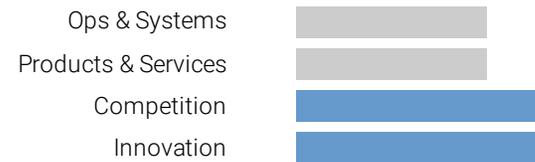


Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Kieran Hettinger

Lake Geovannytown, TN

Tenure: 10+ years

Outlets: 2 units / territories

Training, Support, Marketing

Training - I really like the improvements on the tablet based training for new roll-outs. It is very detailed and well packaged. I would like to see new employee and manager training to be more organized. I feel it jumps between tablet, paper, and restaurant too much. It becomes confusing for trainer and trainee. Marketing has been looking really good! I wish we were further ahead on getting new creative. We are looking to do a Spring campaign, but only have the same creative that we used last spring. Technology - New app is a big improvement. We are still way behind on our POS and BOH systems.

Competition, Products/Services, Creativity

I feel like we took a big step back on this new lettuce. It is large for a salad and takes longer to shred for the line as it is hard to bunch up for fast cutting. It also does not look great. The new steak is also odd sizes which makes the cooking time longer, and makes cutting it to a 1/2" difficult. Our chicken did not change, so I am happy about that. Other products have been solid!

Please give any constructive feedback you have related to your Franchisee Community:

Some are really good and some are not. Hard to group in one answer.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Robin Jacobson

Annieburgh, TX

Tenure: 10+ years

Outlets: 2 units / territories

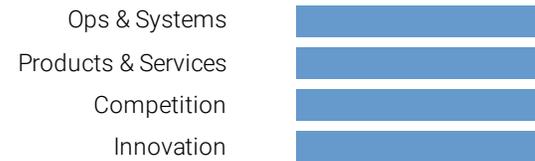
Training & Support

0 25 50 75 100



Franchise System

0 25 50 75 100



Leadership



Core Values



Franchisee Community



Self-Evaluation



Financial Opportunity



General Satisfaction



Individual Scorecards

Overall FSI Score



Robin Jacobson

Annieburgh, TX

Tenure: 10+ years

Outlets: 2 units / territories

Discussing franchise with others:

I frequently and proactively recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Loma Kohler

South Rickeyview, IL

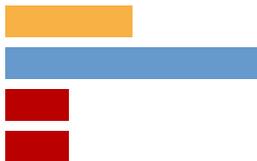
Tenure: 10+ years

Outlets: single unit / territory

Training & Support

0 25 50 75 100

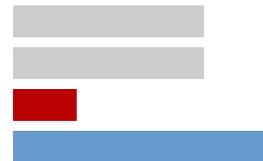
- Training & Support
- Marketing & Promotions
- Effective Technology
- Communications



Franchise System

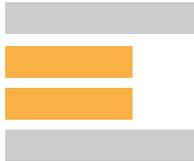
0 25 50 75 100

- Ops & Systems
- Products & Services
- Competition
- Innovation



Leadership

- Clear Vision
- Team Culture
- Involves Franchisees
- Effective in Driving



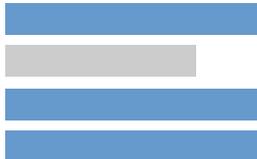
Core Values

- Trust
- Respect
- Honesty & Integrity
- Cares About My Success



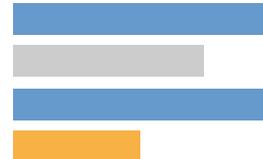
Franchisee Community

- Support Brand
- Support Management
- Support Each Other
- Active Community



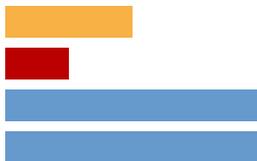
Self-Evaluation

- Enjoy the Business
- Enjoy the Organization
- Active Participant
- Valued Member



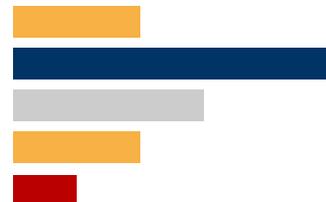
Financial Opportunity

- Fees
- Total Investment
- Financial Picture
- Long-Term Growth



General Satisfaction

- Overall Opportunity
- My Overall Performance
- Overall Satisfaction
- Do It Again
- Recommend



Individual Scorecards

Overall FSI Score



Loma Kohler

South Rickeyview, IL

Tenure: 10+ years

Outlets: single unit / territory

If you could make one recommendation to Senior Management, what would it be?

Poor interaction communication with long time franchise owners

Discussing franchise with others:

I do not recommend the franchise system when asked

Individual Scorecards

Overall FSI Score



Velva Krajcik

McKenziemouth, GA

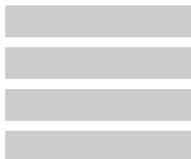
Tenure: 10+ years

Outlets: 2 units / territories

Training & Support

0 25 50 75 100

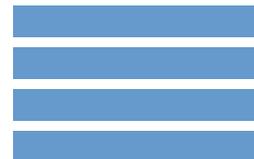
Training & Support
Marketing & Promotions
Effective Technology
Communications



Franchise System

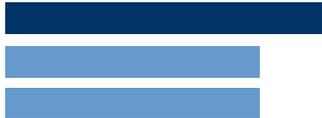
0 25 50 75 100

Ops & Systems
Products & Services
Competition
Innovation



Leadership

Team Culture
Involves Franchisees
Effective in Driving



Core Values

Trust
Respect
Honesty & Integrity
Cares About My Success



Franchisee Community

Support Brand
Support Management
Support Each Other
Active Community



Self-Evaluation

Enjoy the Business
Enjoy the Organization
Active Participant
Valued Member



Financial Opportunity

Fees
Total Investment
Financial Picture
Long-Term Growth



General Satisfaction

Overall Opportunity
My Overall Performance
Overall Satisfaction
Do It Again
Recommend



Individual Scorecards

Overall FSI Score



Velva Krajcik

McKenziesmouth, GA

Tenure: 10+ years

Outlets: 2 units / territories

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Hillard Prohaska

South Stuart, SD

Tenure: less than 2 years

Outlets: single unit / territory

Training & Support

0 25 50 75 100

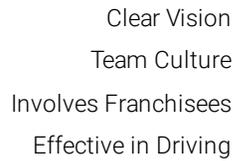


Franchise System

0 25 50 75 100



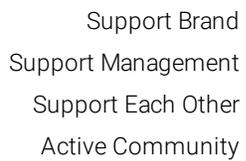
Leadership



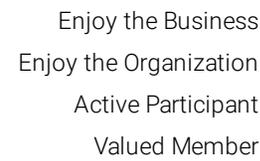
Core Values



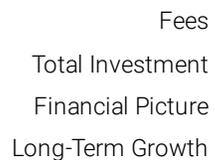
Franchisee Community



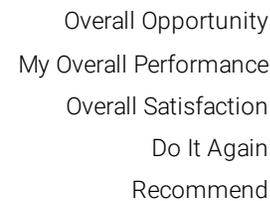
Self-Evaluation



Financial Opportunity



General Satisfaction



Individual Scorecards

Overall FSI Score



Hillard Prohaska

South Stuart, SD

Tenure: less than 2 years

Outlets: single unit / territory

Training, Support, Marketing

The onboarding process when taking over an existing store was poor at best, as I was not provided with any information concerning who to call, etc. Also, completing erasing all historical sales data doesn't make sense at any level, as the historical sales data is essential to effective day-to-day store management.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Chester Rau

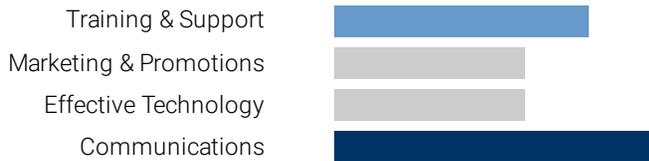
West Madeline, NV

Tenure: 6 - 9 years

Outlets: 2 units / territories

Training & Support

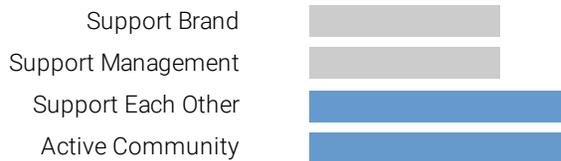
0 25 50 75 100



Leadership



Franchisee Community

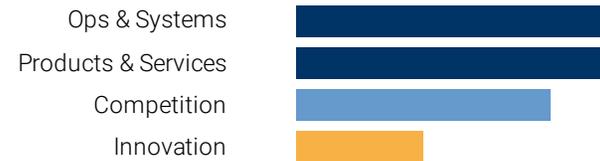


Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Chester Rau

West Madeline, NV

Tenure: 6 - 9 years

Outlets: 2 units / territories

If you could make one recommendation to Senior Management, what would it be?

Best leadership team we have had.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Donnie Satterfield

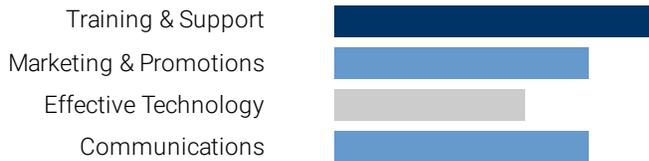
Feeneyport, SD

Tenure: 6 - 9 years

Outlets: 3 units / territories

Training & Support

0 25 50 75 100



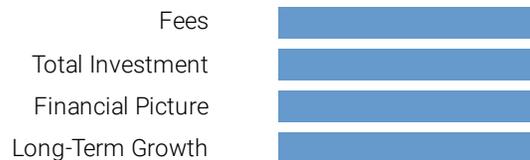
Leadership



Franchisee Community



Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Donnie Satterfield

Feeneyport, SD

Tenure: 6 - 9 years

Outlets: 3 units / territories

Competition, Products/Services, Creativity

It has improved but there were locations I missed out on due to previous management decisions

Please give any constructive feedback you have related to your franchisor's

Core Values:

With the company up for sale, I'm not sure that the current owner is that concerned about franchisee success. Keith and his team are definitely driven to improve our sales and performance.

Please give any constructive feedback you have related to your Franchisee

Community:

I don't really know the other franchisees that well to give a fair assessment

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Trisha Sporer

West Adolphberg, VA

Tenure: 6 - 9 years

Outlets: 2 units / territories

Training & Support

0 25 50 75 100



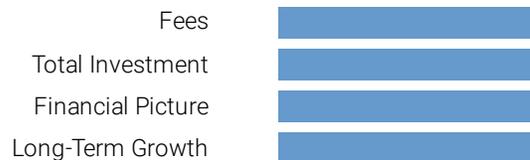
Leadership



Franchisee Community



Financial Opportunity



Franchise System

0 25 50 75 100



Core Values



Self-Evaluation



General Satisfaction



Individual Scorecards

Overall FSI Score



Trisha Sporer

West Adolphberg, VA

Tenure: 6 - 9 years

Outlets: 2 units / territories

Financial Opportunity

I feel good about the investment in the business. I only wish we could find/have an owner that is as passionate about the brand as senior management and the franchise community.

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Kristy Wisoky

Langoshmouth, MO

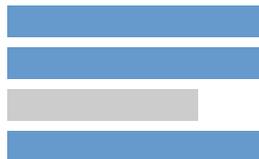
Tenure: 10+ years

Outlets: 4 units / territories

Training & Support

0 25 50 75 100

- Training & Support
- Marketing & Promotions
- Effective Technology
- Communications



Franchise System

0 25 50 75 100

- Ops & Systems
- Products & Services
- Competition
- Innovation



Leadership

- Clear Vision
- Team Culture
- Involves Franchisees
- Effective in Driving



Core Values

- Trust
- Respect
- Honesty & Integrity
- Cares About My Success



Franchisee Community

- Support Brand
- Support Management
- Support Each Other
- Active Community



Self-Evaluation

- Enjoy the Business
- Enjoy the Organization
- Active Participant
- Valued Member



Financial Opportunity

- Fees
- Total Investment
- Financial Picture
- Long-Term Growth



General Satisfaction

- Overall Opportunity
- My Overall Performance
- Overall Satisfaction
- Do It Again
- Recommend



Individual Scorecards

Overall FSI Score



Kristy Wisoky

Langoshmouth, MO

Tenure: 10+ years

Outlets: 4 units / territories

Training, Support, Marketing

We feel the training and support from Molly Wally's Corp is in need of improvement. Especially IT...we know improvements are on the way with IT, but we need new BOH software and chip and pin technology

Competition, Products/Services, Creativity

Have a lot of confidence that the current management team will address and "fix" any current deficiencies in the franchise system

If you could make one recommendation to Senior Management, what would it be?

Continue to be open and continue to work with franchisees

Please give any constructive feedback you have related to your franchisor's

Core Values:

Franchisor's core values are generally in alignment with our (franchisee) values

Please give any constructive feedback you have related to your Franchisee

Community:

Believe we have a very strong franchise community

Financial Opportunity

We are very confident that Molly Wally's will be the brand we want to invest our time and money with in the upcoming years...

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Individual Scorecards

Overall FSI Score



Magdalena Wyman

Lake Carlotta, MN

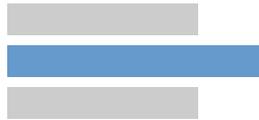
Tenure: 10+ years

Outlets: 2 units / territories

Training & Support

0 25 50 75 100

Training & Support
Marketing & Promotions
Effective Technology



Franchise System

0 25 50 75 100

Ops & Systems
Products & Services
Competition
Innovation



Leadership

Clear Vision
Team Culture
Involves Franchisees
Effective in Driving



Core Values

Trust
Respect
Honesty & Integrity
Cares About My Success



Franchisee Community

Support Brand
Support Management
Support Each Other
Active Community



Self-Evaluation

Enjoy the Business
Enjoy the Organization
Active Participant
Valued Member



Financial Opportunity

Fees
Total Investment
Financial Picture
Long-Term Growth



General Satisfaction

Overall Opportunity
My Overall Performance
Overall Satisfaction
Do It Again
Recommend



Individual Scorecards

Overall FSI Score



Magdalena Wyman

Lake Carlotta, MN

Tenure: 10+ years

Outlets: 2 units / territories

Discussing franchise with others:

When asked, I recommend that others join the franchise system

Open Text Responses

Please give any constructive feedback you have related to the overall quality of your franchisor's Training and Support:

Anonymous: Is getting better I like to see help with marketing I feel we r not getting enough help from u guys open two stores last year still haven't seen any visits from any marketing people

Anonymous: To many changes back and forth - paper to tablets, back to paper, etc.

Estelle Hessel: Molly Wally's is far behind on technology, especially in the back of house and POS systems. Reporting tools in share point are a mess and the franchisee must go to multiple sources to get performance data. Everything needs to be accessed from one portal.

Erna Gusikowski: love the hybrid approach as well as the Molly Wally's Recipe and use of hospitality pillars.

Anonymous: Too much information thrown at the Franchisee. Too many departments doing webinars. To much data and too many changes thrown at the franchisee such that we are lost most of the time. Very frustrating. Seems like Corporate is not much more than a depository for Royalty and Marketing fees and the ever increasing IT monthly fees. Our margins are shrinking because of this! We can't keep passing it on to our customers. We are not competitive price wise.

Hillard Prohaska: The onboarding process when taking over an existing store was poor at best, as I was not provided with any information concerning who to call, etc. Also, completing erasing all historical sales data doesn't make sense at any level, as the historical sales data is essential to effective day-to-day store management.

Open Text Responses

Please give any constructive feedback you have related to the overall quality of your franchisor's Training and Support:

Kieran Hettinger: Training - I really like the improvements on the tablet based training for new roll-outs. It is very detailed and well packaged. I would like to see new employee and manager training to be more organized. I feel it jumps between tablet, paper, and restaurant too much. It becomes confusing for trainer and trainee. Marketing has been looking really good! I wish we were further ahead on getting new creative. We are looking to do a Spring campaign, but only have the same creative that we used last spring. Technology - New app is a big improvement. We are still way behind on our POS and BOH systems.

Anonymous: OVERALL THE training is good but the material is a bit confusing in some materials. electronic searching is difficult although the actual content is good. search functions and flow of training materials could improve. also there are areas that are difficult to find in the website on what is available and what support is available. sometimes it's also difficult on what materials are actually available.

Kristy Wisoky: We feel the training and support from Molly Wally's Corp is in need of improvement. Especially IT...we know improvements are on the way with IT, but we need new BOH software and chip and pin technology

Gabriel Brown: Too many training tools. Need to get rid of Molly Wally's net, focus Molly Wally's training.com on essential tools and make it easier to navigate (simplify verbiage, group by things like orientation, first day, etc). We have never had a strong marketing effort. Technology-we are upgrading pos to because our systems are obsolete. We should have simple information tools that have been available for 20 years or more. I had better technology in another concept in 2006. I know this takes time but this is where we are today. I will say that the 3rd party integration was a huge step forward. Best thing we have done in years.

Anonymous: Good. Excellent company culture. Responsive.

Anonymous: Haven't LLC ha to use personally.

Anonymous: I feel that the training programs are excessive and very difficult for the average new employee to retain all of the material that is presented. In my opinion a simpler, streamlined program would have more impact.

Open Text Responses

Please give any constructive feedback you have related to the overall quality of your franchisor's Training and Support:

Devin Conroy: 45-60 minutes to train employees for each promo is too long. New FBC wasn't responsive to emails and Franchise VP wasn't either. It seems to be getting better but in all the transition over the 2020 summer there was some frustration with the communication.

Open Text Responses

Please give any constructive feedback you have related to the overall quality of your Franchise System:

Anonymous: It's good I like chef Kati I think she is going to help a lot I was impressed with the new salsa

Collin Feil: Would like to see more incentives for franchisees to grow store count

Anonymous: they are catching up after years of being behind.

Anonymous: I regret getting involved with Molly Wally's. I have not been happy with the way things are heading for some time. As a franchisee in the system for numerous years, I have seen the leadership team come and go. And as always, with the new leadership team they make the same mistakes as the previous team thus costing me time and money.

Kieran Hettinger: I feel like we took a big step back on this new lettuce. It is large for a salad and takes longer to shred for the line as it is hard to bunch up for fast cutting. It also does not look great. The new steak is also odd sizes which makes the cooking time longer, and makes cutting it to a 1/2" difficult. Our chicken did not change, so I am happy about that. Other products have been solid!

Donnie Satterfield: It has improved but there were locations I missed out on due to previous management decisions

Kristy Wisoky: Have a lot of confidence that the current management team will address and "fix" any current deficiencies in the franchise system

Open Text Responses

Please give any constructive feedback you have related to the overall quality of your Franchise System:

Devin Conroy: We need to be able to provide free offers to our guest. Free chips and queso for your first online order. New salsa came out in Oct.2020 and we should be offering free chips and salsa to guest to try the new (amazing) roasted tomato salsa. We could do monthly challenges for rewards customers. Come in 4 times in the month of November and receive 2000 bonus points etc... the GDR process is a pain and cumbersome. Takes too long.. need editable generic GDRs we can easily edit and use. The LRM tool is broken. Would be great if Adrienne would offer a quarterly webinar about marketing....lunch and learn session

Open Text Responses

If you could make one recommendation to Senior Management, what would it be?

Anonymous: Continue to be very innovative Bc the competition is very fierce

Collin Feil: Making huge gains in the last year. Keith has surrounded himself with a very strong team.

Anonymous: Tell the truth

Estelle Hessel: Don't wait for the franchise association to put together a meeting. Molly Wally's Corp needs to have regular business meetings with the franchisees and corporate operation.

Anonymous: I really do not think Senior Management really knows what is going on. They need a serious reality check. There may be two separate agendas involved. Franchisee advisory counsel is a "yes man" to corporate desires. The counsel does not have a way to independently analyze what corporate presents to them. They take it a "face value". I do not trust what Corporate says.

Loma Kohler: Poor interaction communication with long time franchise owners

Chester Rau: Best leadership team we have had.

Kristy Wisoky: Continue to be open and continue to work with franchisees

Gabriel Brown: Partner with a capital provider you allow easy access to capital fir new stores and remodels. This will propel the concept forward exponentially. And continue to focus on reducing new store cost.

Devin Conroy: State of the business is nice, continue to do these quarterly.

Open Text Responses

Please give any constructive feedback you have related to your franchisor's Core Values:

Collin Feil: Good partnership that they work very hard to cultivate

Anonymous: They are focusing on short term gains/growth at the expense of the franchisee

Anonymous: Enough said already. Do not wish to repeat myself.

Donnie Satterfield: With the company up for sale, I'm not sure that the current owner is that concerned about franchisee success. Keith and his team are definitely driven to improve our sales and performance.

Kristy Wisoky: Franchisor's core values are generally in alignment with our (franchisee) values

Open Text Responses

Please give any constructive feedback you have related to your Franchisee Community:

Anonymous: Continue to help each other n share ideas

Anonymous: NA

Anonymous: The franchisee community is the only thing keeping this brand alive.

Kieran Hettinger: Some are really good and some are not. Hard to group in one answer.

Donnie Satterfield: I don't really know the other franchisees that well to give a fair assessment

Kristy Wisoky: Believe we have a very strong franchise community

Devin Conroy: FBC needs to have quarterly zoom meetings with regional franchisees to go over challenges, best practices, successes etc...

Open Text Responses

Please give any constructive feedback you have related to the Financial Opportunity of your business:

Anonymous: I need to increase sales n improve profit margin Bc I like to keep building Bc I need more penetration

Anonymous: The company is focusing on 3rd party and other digital platforms for growth with little or no regard for our financials. Increase revenue for QRC equals increased royalties, regardless of franchisee margins.

Estelle Hessel: The billing of fees and the Reimbursement payment of gift cards is in disarray and I feel that it's not going to be resolved. Costs for support have risen dramatically.

Anonymous: The franchisor loves to spend the franchisees' money. Every moment I turn around, there is another required item that I am having to purchase or another fee that is assessed. This is killing my bottom line. If the franchisor is so head strong with all of these new items needed to operate our restaurants (i.e. blenders, bluetooth thermometers, restaurant tablets, ect...), then they should buy this for the franchisee community.

Santa Crist: There is a feeling of being nickel and dime by all the fees and charges with a visual positive return on investment. The pace and communication add to this feeling.

Anonymous: Hopeful on the future but it has been very long and financially heavy.

Kristy Wisoky: We are very confident that Molly Wally's will be the brand we want to invest our time and money with in the upcoming years....

Open Text Responses

Please give any constructive feedback you have related to the Financial Opportunity of your business:

Anonymous: Food cost challenges in Canada continue to be the biggest challenge. Growth in the Canadian system needs to accelerate to build brand awareness and help the Canadian franchisees grow as a brand. However, the challenge is current franchisees investing with a high food cost model, as well as recruiting new franchisees.

Devin Conroy: No where to grow even though I'm doing well.

Trisha Sporer: I feel good about the investment in the business. I only wish we could find/have an owner that is as passionate about the brand as senior management and the franchise community.

Recommendations & Next Steps

Thank Franchisees

If you haven't already done so, send a system-wide broadcast thanking all your franchisees for taking part in the survey project. Show your appreciation for all the feedback they shared. You can explain that you and your team are working with Franchise Business Review to analyze the many responses from franchise owners, and you will circle back soon to share the results. This will help reinforce the value of the survey project and encourage even higher participation next time around.

Share Survey Results

You and your team obviously need time to digest and analyze your survey results. That said, the sooner you can share some high-level insights with franchise owners, the better engagement you will receive. Thank franchisees again for participating and sharing their feedback. Highlight the strong franchisee community and strengths of the brand and be honest about any challenges. Don't worry about solutions yet; franchisees just want to know their voices have been heard and you are taking their feedback seriously. Explain there is work to be done, but TOGETHER you can build a better franchise system.

Engage Franchisees in the Solutions

Whenever possible, allow franchisees to participate in the solutions and action planning that develops post-survey. The more franchisees can "own the process," the more active and engaged they will be in implementing any changes or system improvements presented.

Make Unit-Level Economics Priority #1

Create an internal strategy and marketing campaign with the top priority of boosting franchisee revenue and profitability. It would be good to have a 3-5 year stretch goal that gets franchisees excited. Driving revenue growth is obviously the goal of every company, but you'll want to tweak internal communications to place an emphasis on driving "franchisee sales and profitability." This messaging will need to be at the core of all your business strategies and communicated frequently across the network.

Keep Communicating Your Progress

Clearly communicate goals and action plans that result from this project, and report back to the entire network regularly on your progress toward these goals. Whenever possible, highlight franchisees who have been involved and celebrate project milestones at both annual and regional meetings. Keep reminding franchisees that these activities and accomplishments are a direct result of their feedback. Franchisee engagement will continue to grow.

Win-Win Not "Us vs Them"

Remind corporate employees, field support staff, business coaches, vendors, and other partners that many of your franchisees have invested their life savings into your brand, and they don't get a paycheck at the end of the week until all their employees and bills are paid. Inflation and labor costs are driving up costs for every business owner, and profit margins are getting leaner in many cases. Do not tolerate anyone on your team talking negatively to or about a franchisee, even when a franchisee is angry or frustrated. Demonstrate to your franchisees that EVERYONE in your organization is working for them, not the other way around.

Press the Flesh

Get senior leadership out in the field and in your franchise locations as much as possible. Launch a new listening tour and meet face-to-face with as many franchisees as possible. Find a few key areas to highlight to franchisees that corporate is listening. Having leadership widely visible in your locations is more important than ever.

Spend Time on the Front Lines

Everyone throughout the organization should spend time working in a franchise location several times a year. Being on the front lines on a regular basis will bring a new and fresh perspective to every role. Engage with employees, managers, franchisees, and customers for feedback and ideas to address key challenges. The best insights often come from working on the front lines and serving customers.

Recommendations & Next Steps

Reinforce Franchisee Leadership

From your Franchise Advisory Council all the way down to local and regional franchisee committees and boards, thank all your owners for serving, and remind everyone of the importance of two-way communication with their “constituents.” All too often, franchisee leaders serve on various committees but rarely communicate with the franchisees they represent. Franchisees at all levels of the organization need to be directly engaged by their local franchisee leaders, and regular communication needs to flow both ways. Assess that your franchisee leadership is diverse and representative of all ownership segments, and most importantly, viewed positively by the franchisee community. Engage new and younger franchisees to step up into leadership roles to ensure fresh ideas and new perspectives.

Celebrate the Wins... Big and Small

Today's business environment is challenging and stressful. Look for ways to identify and celebrate the heroes within your organization and share their stories with the world. Franchisees, employees, and customers will all appreciate hearing about your success.

Individual Follow-up

Once the overall results have been shared with your system, schedule one-on-one time with each franchisee for individual follow-up. Clarify any outstanding questions or concerns, and clearly identify each franchisee's key priorities. Set realistic timeframes around each priority and identify some “easy wins” to show short-term, bottom-line results.

Measure... Adjust... Repeat

The days of doing a single annual survey with franchisees or employees are over. Your organization needs to engage your key stakeholders more frequently to create a constant performance feedback loop. Shorter, more frequent pulse surveys will help keep franchisees and employees more engaged and give your entire organization additional insights to improve performance and grow.

For us, driving better results is much more than a tagline. It's about helping the very best brands – and their franchisees – achieve greater success.

Congratulations on Taking a Big Step Toward Building Stronger Franchisee Relations.

Running a successful franchise organization is challenging. We hope this report provides you with a few actionable insights and ideas to help move your company forward.

The FBR team is here for you. If you need additional feedback from your franchisees, your employees, your candidates, or your customers, we'll help you get the insights you need. Please don't hesitate to reach out with any questions about our research, or ideas on how you and your team can continue to drive better results.

Happy Franchising!

Your Team at Franchise Business Review

