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# SPECIAL SESSIONS

FEBRUARY 7-8, 2020 | ORLANDO WORLD CENTER MARRIOTT | ORLANDO, FL

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INSTITUTE OF CERTIFIED FRANCHISE EXECUTIVES™  
PRE-CONVENTION EDUCATIONAL SEMINARS

IFA  
2020 CONVENTION

  
IFA FOUNDATION  
INTERNATIONAL FRANCHISE ASSOCIATION EDUCATION. RESEARCH. IMPACT.



## MISSION STATEMENT

The mission of the Institute of Certified Franchise Executives™ (ICFE) is to certify and educate individuals & organizations to the highest standards. We will:

- Be a leading resource to accelerate individual & organizational growth.
- Provide applicable, forward-thinking education and learning opportunities that only we can provide.
- Facilitate a lifelong, continuous improvement network of trusted colleagues.

**PLEASE NOTE THAT REGISTRATION FOR THE ICFE SPECIAL SESSIONS IS NOT INCLUDED IN IFA CONVENTION REGISTRATION. THERE IS A SEPARATE AND ADDITIONAL REGISTRATION FEE FOR THE ICFE SPECIAL SESSIONS.**

Registrants understand and consent that ICFE may record, edit and reproduce the courses, and use such recordings for educational, promotional and other purposes, all at its discretion.

**Certified Franchise Executives™**

**Better Preparation  
Better Performance**

## **WELCOME TO THE 2020 ICFE SPECIAL SESSIONS!**



Of all the certifications you'll earn in your life, becoming a Certified Franchise Executive™ (CFE) is among the top! Making the decision to earn your CFE is the first step in skyrocketing your franchising career. You know your franchise brand and product line; the CFE educates you and gives you the powerful franchising knowledge you need, thus the combination of the knowledge of your brand and the franchising industry equips you to propel your company.

The CFE is for everyone: franchisors, franchisees, and suppliers alike. There is education and benefits for all. As a CFE, you're taking on a new leadership role for you and your company. Becoming a CFE opens a new entitlement to you into the membership of franchising. And the CFE Special Sessions are just the place to help you obtain your CFE.

During the two-day Special Sessions, you're in store for a wealth of knowledge and courses. By attending both Friday, February 7, 2020 and Saturday, February 8, 2020, 9:00 a.m. to 5:00 p.m., you earn up to 500 CFE credits. While attending, you'll learn an array of information for more information on the sessions go to [www.franchise.org/cfe](http://www.franchise.org/cfe).

In 2019, we awarded 212 franchise executives their CFE certificates. Last year, our ICFE Board of Governors committed to developing more courses tailored to franchisees as well as more online courses; both are now a reality and continue to grow, with more to come.

On the heels of the Special Sessions, you have the 2020 IFA Annual Convention in Orlando, FL at your fingertips! The convention gives you the best educational franchise opportunities and networking opportunities available. Starting out at the Special Sessions, then continuing your education and journey to the convention, is a true plan for success. Take advantage of all you can from the educational sessions to EXPO events to networking and special event opportunities at the convention. And you can earn up to another 400 CFE credits!

Whether you're a new CFE candidate or a current CFE working towards recertification, IFA is here for you. We all invite you to continue your journey and maintain your CFE. And, if you're still debating whether to take the CFE jump, just do it now. Enroll in the program by using the application form, part of this online booklet, or enroll online at our website [www.franchise.org/cfe](http://www.franchise.org/cfe).

All of us with our CFE certification look forward to watching you and your brand grow as you take on and maintain the CFE Certification. We look forward to meeting you in Orlando, FL!

A handwritten signature in black ink that reads "Harvey H. H. Homsey".

**Harvey H. H. Homsey, CFE**  
Chair, Institute of Certified Franchise Executives™  
Vice President – Franchise Systems  
Express Employment Professionals International Headquarters

**Friday FEBRUARY 7, 2020 | 9:00 AM - 5:00 PM**

**200 CFE EDUCATION CREDITS**

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Kay Ansley, CFE



Joe Bourdow, CFE



Barry Heller, CFE



Mark Liston, CFE



Bret Lowell, CFE

## Principles Of Franchising

This intensive one-day course will provide an overview of key issues faced by franchise executives in managing franchise operations. Using real-life scenarios, and hypothetical formats, the course will present a series of problems that are faced by franchise executives every day. Executives will learn about the serious problems franchisors typically face, how others are solving them, and how to make good decisions concerning difficult issues.

### Presenters:

**Kay Ansley, CFE**, Managing Director, MSA Worldwide; **Joe Bourdow, CFE**, Senior Advisor, Valpak; **Barry Heller, CFE**, Partner, DLA Piper LLP (US); **Mark Liston, CFE**, President, Glass Doctor; **Bret Lowell, CFE**, Partner, DLA Piper LLP (US)

**Friday FEBRUARY 7, 2020 | 9:00 AM - 5:00 PM**

**200 CFE EDUCATION CREDITS**

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Steve LeFever, MBA, CFE

## **Profit Mastery: Financial Boot Camp – Improving Network Unit Profitability and Performance**

Profit Mastery turns standard financial statements into powerful financial intelligence, and you will find that the Financial Report Card - combined with the unique Financial Performance Road Map – to be unusually effective in pinpointing and quantifying the dollar impact of improved efficiency. Furthermore, the intriguing Cup Theory will point the way to use Break Even Analysis to manage the revenue/cost Analysis to manage the revenue/cost relationship and prove to be an invaluable strategic tool in managing costs and, ultimately, profitability.

**Presenter:**

**Steve LeFever, MBA, CFE**, Chairman & Founder, Profit Mastery

**Friday FEBRUARY 7, 2020 | 9:00 AM - 5:00 PM**

**200 CFE EDUCATION CREDITS**

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Janet Muhleman, CFE



Michael Sugg

## **Understanding, Choosing, and Using Media for your System**

Media options can seem endless, ever-changing, and confusing. Do you know your options? How do you know what is “correct?” Learn the lingo and hear from channel experts as we discuss what is media, what it can achieve, and how to think strategically about activating. You’ll walk away with media planning basics, and a better understanding of how to build your media mix to serve your franchise goals.

### **Key Attendee Takeaways:**

- Better understanding of media and its role in the marketing plan
- Questions to ask before you activate
- How to prepare for challenges

### **Presenters:**

**Janet Muhleman, CFE**, President, re:group, inc.;

**Michael Sugg**, Integrated Media Director, re:group, inc.

**Friday FEBRUARY 7, 2020 | 9:00 AM - 5:00 PM**

**200 CFE EDUCATION CREDITS**

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Kory Kogon



Suzette Blakemore, CFE

## Create a Culture of Extraordinary Productivity (FranklinCovey)

21st-century knowledge workers and leaders are paid to think, plan, communicate, and execute with excellence. Franchise executives know this better than most. Trying to do these vitally important things and grow revenue is even more difficult in the midst of overwhelming demands, distractions, crises, and more. It can be hard work to represent the brand effectively, develop leads, build long-term winning strategies, foster key relationships, and improve systems. In this session, be prepared to learn the measurable processes to consistently make high value decisions; focus attention in the midst of unprecedented distractions; and create the energy required to execute with excellence.

**Presenters:**

**Kory Kogon**, Global Productivity Practice Leader, FranklinCovey; **Suzette Blakemore, CFE**, Managing Director, FranklinCovey

**Friday FEBRUARY 7, 2020 | 9:00 AM - 5:00 PM**

**300 CFE EDUCATION CREDITS**

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Cynthia Gartman, CFE

## **IFA Fran-Guard™: IFA's Franchise Sales Management and Compliance Program**



Rick Morey, CFE



Will Woods, CFE

IFA FRAN-GUARD™ is IFA's Franchise Sales Management and Compliance program. Through this program, we demonstrate the business case for compliance and how a culture of compliance will help you and your staff build a vibrant company while assisting you to protect your system and avoid costly mistakes. This session is especially designed for senior executives to show how you can take proactive steps to reduce risks, manage growth, and build a stronger, healthier franchise system.

### **Presenters:**

**Cynthia Gartman, CFE**, CSA, NCG, Tx, Publisher, Seniors Blue Book Franchising; **Rick Morey, CFE**, Partner, DLA Piper US LLP; **Will Woods, CFE**, Partner, Baker & McKenzie



**Saturday FEBRUARY 8, 2019 | 9:00 AM - 5:00 PM**

## **200 CFE EDUCATION CREDITS**

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William Edwards, CFE,

### **Taking Your Franchise Global In Interesting Times**

In 2014, the last year figures are available, US \$6.1 billion in fees and royalties were received by U.S. franchisors from their international licensees. A more recent IFA survey of franchisor Members showed that fully 85% were international to some extent or planned to Go Global. Some large U.S. F&B franchisors receive the majority of their profits from international license operations. Even small IFA franchisor Members have gone global in recent years.

However, a number of surveys indicate that 40% or more of the international franchise agreement unit development schedules are not realized, resulting in lower fees and royalties for the franchisors.

This CFE course will be taught by international executives who have actually done international franchise operations and development and will also include highly experienced international lawyers and consultants. The first part of this course will focus on the why, how, when, where and with whom of taking a franchise global. The second half of the course will focus on how best to train, support and grow international licensees with a goal to show how to realize the highest return on investment over time for Going Global with a franchise brand.

#### **Presenter:**

**William Edwards, CFE**, Chief Executive Officer, Edwards Global Services

**Saturday FEBRUARY 8, 2019 | 9:00 AM - 5:00 PM**

## **200 CFE EDUCATION CREDITS**

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Brian Schnell, CFE



Greg Nathan, CFE

### **FranTogether: How to Create Healthy Franchise Relations**

It is simply impossible to achieve sustainable success in franchising without healthy franchise relations.

FranTogether is a practical workshop that teaches proven franchise relationship skills and strategies based on cutting edge psychology, decades of real-world experience, and research from hundreds of franchise networks.

You will experience an engaging and impactful day of interactive learning, with lots of opportunity to discuss and share your insights on hot topics of importance to you. You will also learn powerful evidence-based tools and processes for building trust and improving communication at the personal and organizational level.

FranTogether is led by two passionate and respected franchise practitioners - an attorney and a psychologist – both recipients of the prestigious Crystal Compass Award for Franchise Leadership, and both highly experienced in the real world of managing the inherent challenges of franchising.

Whether you are a seasoned CEO, or someone relatively new to franchising, you'll find this program useful, enjoyable and inspiring.

#### **Presenters:**

**Brian Schnell, CFE**, Partner, Faegre Baker Daniels LLP;

**Greg Nathan, CFE**, Founder, Franchise Relationships Institute

**Saturday FEBRUARY 8, 2019 | 9:00 AM - 5:00 PM**

**200 CFE EDUCATION CREDITS**

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Rod Bristol, CFE



Barbara Nuss



Stuart Donaldson

## **Advanced Financial Essentials: Driving Profitable Growth Through Multi-Unit Expansion Logistics**

We all aim to support the profitable growth of franchises and franchise networks. In this session we'll apply financial tools and skills to establish a pathway to successful expansion through multi-unit ownership.

We'll begin by exploring valuation methods and strategies for building business value. Then, based on your cost structure and the value you seek to build, we will determine the investments and multi-unit growth plan to produce the real returns your investment requires.

We'll also identify the skills, aptitudes and mind sets of successful multi-unit franchisees and hear how the best in the business create an investor's mind-set and prepare their franchise system and support teams to facilitate successful multi-unit ownership.

Each attendee leaves the session with his or her own traction plan aimed at profitable growth through multi-unit expansion.

### **Presenters:**

**Rod Bristol, CFE**, Director, Business Development, Profit Soup; **Barbara Nuss**, President & Founder, Profit Soup; **Stuart Donaldson**, Profit Soup Australia doing business as Banyan Co.

# Saturday FEBRUARY 8, 2019 | 9:00 AM - 5:00 PM

## 200 CFE EDUCATION CREDITS

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Kory Kogon



Suzette Blakemore, CFE

### Six Critical Practices of Leading a Team (FranklinCovey)

First-level leaders make a significant impact on every metric in your business: employee productivity and engagement, customer satisfaction and loyalty, problem solving and financial performance. They are frequently responsible for the quality of the customer experience, and whether top talent stays or leaves. People skills typically account for 80 percent of success in this role. Yet many people are promoted because of their technical capabilities and some franchisees become franchisees because of their love of a product or service, not because of their people or leadership skills. The role of the first-level leader, whether new or experienced, has always been tough and today's realities make the role even tougher.

#### Presenters:

**Kory Kogon**, Global Productivity Practice Leader, FranklinCovey; **Suzette Blakemore, CFE**, Managing Director, FranklinCovey

**Saturday FEBRUARY 8, 2019 | 9:00 AM - 5:00 PM**

**300 CFE EDUCATION CREDITS**

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Cynthia Gartman, CFE

## **IFA Fran-Guard™: IFA's Franchise Sales Management and Compliance Program**



Rick Morey, CFE



Will Woods, CFE

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### **Presenters:**

**Cynthia Gartman, CFE**, CSA, NCG, Tx, Publisher, Seniors Blue Book Franchising; **Rick Morey, CFE**, Partner, DLA Piper US LLP; **Will Woods, CFE**, Partner, Baker & McKenzie



# TOP 8 QUESTIONS

## About the Certified Franchise Executives™ Program

### 1. Where is the CFE website?

The CFE section of the IFA website can be reached directly at [www.franchise.org/cfe](http://www.franchise.org/cfe).

### 2. How do I log in to see my CFE credits?

Go to [www.franchise.org/cfe](http://www.franchise.org/cfe). Click on “My CFE”. Your username is your email address as it appears in the IFA membership records. Your password is your individual IFA ID number. If you change your email or password and do not notify us you won’t be able to log in until we make the changes to your record.

### 3. Where are the online courses?

The online training portal is Franchise University located at [ifa.tortal.net](http://ifa.tortal.net). Check the most current CFE calendar for details on all CFE credited programs. The CFE calendar is regularly updated and can be found at [www.franchise.org/cfe](http://www.franchise.org/cfe).

### 4. I can't log in to my online courses—why do I get a message that my username/password are wrong?

Every online training portal is independent and separate. When you first decide to take a course at one of the online training sites, you must register as a new user and create a unique username and password to access the site going forward. You need to save the login information for later access to the site.

### 5. When must I complete my CFE credits in order to graduate?

Graduation takes place once a year at IFA’s Annual Convention. In order to be eligible to graduate, candidates must complete all the required credits by November 20th of the preceding year.

### 6. How long do I have to complete the program?

Candidates have three years from enrollment to complete the certification program. If you do not finish within that time period, you may re-enroll (additional fee applies) once more for another 3 years with no forfeiture of credits earned to date.

### 7. Where can I find information about course offerings?

The current CFE Calendar is available at [www.franchise.org/cfe](http://www.franchise.org/cfe) and is updated on a regular basis. You can also check the “Events” section of the IFA website – [www.franchise.org](http://www.franchise.org). You should also watch for the monthly “CFE Enews” electronic newsletter sent to all members on a monthly basis.

### 8. Can you explain the types and difference in CFE credits?

There are three types of CFE credits: Experience (500 maximum can be credited); Participation (500 maximum can be credited); Education (minimum of 2500 needed).

# ICFE CERTIFICATION REQUIREMENTS

A minimum of 3500 credits is required to qualify for the Certified Franchise Executive™ (CFE) designation. Granting of the CFE designation to qualified candidates is determined by the ICFE Board of Governors. CFE candidates earn credits that are applied toward certification. These credits are earned in the following three areas:

## 1. EXPERIENCE (500 credits maximum)

This area allows credit for past experience gained through work or training experiences in the area of franchising. CFE candidates will earn 100 credits (to a maximum of 500) for each year of work experience in franchising. CFE candidates may earn a maximum of 500 credits for experience in career/work experiences as a franchisor, franchisee, or other franchising professional experience.

## 1. PARTICIPATION (500 credits maximum)

This area will provide practical experience gained from participation in events conducted by the International Franchise Association (IFA). CFE candidates must attend at least one IFA approved event each year. CFE candidates may earn a maximum of 500 credits:

- Membership in IFA or membership in other national franchise association recognized by the World Franchise Council (WFC) (100 credits per year)
- IFA Annual Convention (100 credits)
- IFA Franchise Action Network Annual Meeting (100 credits)
- IFA Franchise Business Network (50 credits per meeting)
- Women in Franchise Network (50 credits per meeting)
- International Franchise Expos (IFE) (50 credits per event)
- Other programs as designated
- IFA Webinars (e.g. WednesdayWise, etc.) (50 credits per event)
- IFA Legal Symposium (100 credits)

## 1. EDUCATION (2500 credits minimum)

Education credits are earned by taking ICFE approved courses or sessions that cover fundamental skills and knowledge considered essential for a franchise executive. These topics include:

- Fran-Guard™ (required)
- Diversity
- Economics, Accounting or Financing
- Franchisee Recruitment and Training
- Franchisor/Franchisee Relations
- Franchise Law Regulations
- Human Resource Management
- Management & Operations
- Marketing
- Social Media
- CFE Final Exam (required)

In addition candidates may earn credits in ICFE approved courses or sessions in special interest areas such as:

- Franchising Concepts
- Franchise Conventions
- Franchising Trends
- Insurance
- International Franchising
- Public Relations/ Communications
- Real Estate and site selection
- Resource Management

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All Candidates who enroll in the Certified Franchise Executives™ program must successfully complete the CFE Study Guide Exam and the IFA FRAN-GUARD™ courses (online) as part of their requirements to receive their CFE designation.



INSTITUTE OF CERTIFIED  
FRANCHISE EXECUTIVES

BETTER PREPARATION.  
BETTER PERFORMANCE.



### I AM A CFE BECAUSE...

"...it's where education meets ambition; giving me the power to align with others and charge forward in the world of franchising.

The CFE is an investment in a journey where through online learning, in person education, and event engagement you will uncover the world of franchising and the wonderful like-minded people that inhabit it. The CFE path lays a foundation to create exponential change within your organization and provides a stepping stone to interact and impact an industry that will charge centuries into the future."



**Tim Katsch, CFE**  
K-9 Resorts Daycare & Luxury Hotel

For more information about getting your CFE,  
contact Rose DuPont at 202-628-8000 or visit [www.franchise.org/cfe](http://www.franchise.org/cfe).

The Institute for Certified Franchise Executives (ICFE) offers a wide range of continuing education programs for professional development culminating in the Certified Franchise Executives (CFE) designation. Our mission is to enhance the professionalism of franchising by certifying the highest standards of quality training and education.



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BETTER PERFORMANCE.



Devin Bevis, CFE



Jeff Bevis, CFE



Larry France, CFE

"We value the CFE curriculum and achieving its designation has a direct impact on all service levels provided to our franchise owners. Earning and renewing our CFE equates to the highest level of franchising knowledge and expertise. It also assists us in staying on the leading edge of best practices and insuring the highest level of ethical business practice all across our FirstLight HomeCare system."

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## INSTITUTE OF CERTIFIED FRANCHISE EXECUTIVES

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Telephone: 202.628.8000 | Fax: 202.628.0812  
Email: [rduPont@franchise.org](mailto:rduPont@franchise.org) | [www.franchise.org/cfe](http://www.franchise.org/cfe)

## 2020 ICFE SPECIAL SESSIONS REGISTRATION FORM

FEBRUARY 7-8, 2020 | ORLANDO WORLD CENTER MARRIOTT | ORLANDO, FL

Registration for the ICFE Special Sessions is not included in your IFA Convention registration. There is a separate and additional registration fee for the ICFE Special Sessions. REGISTRATION FOR ALL SESSIONS IS ON FIRST COME-FIRST SERVED BASIS. Registrants understand and consent that ICFE may record, edit and reproduce the courses, and use such recordings for educational, promotional and other purposes, all at its discretion. NOTE: A test will be distributed at the conclusion of each Special Session which must be completed and submitted by attendees to the course presenter. CFE credits will only be granted to those who submit and pass the test. No exceptions will be made.

Full Name \_\_\_\_\_ Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

**CFE CREDITS:** IFA FRAN-GUARD™ program: 300 CFE education credits. All other full-day programs: 200 CFE Education credits.

**REGISTRATION FEES:** IFA Member: \$675.00 per session, Non-Member: \$875.00 per session. Registration includes: Program, program material, lunch & breaks.

- Check here if you require special assistance to fully participate.
- Please register me for the following ICFE Special Session(s).

Name (for badge): \_\_\_\_\_

### FRIDAY FEBRUARY 7, 2020

Select only one session on each day. (9am-5pm)

- Principles of Franchising
- Profit Mastery: Financial Bootcamp - Improving Network Unit Profitability and Performance
- Understanding, Choosing, and Using Media for your System
- Create a Culture of Extraordinary Productivity
- IFA Fran-Guard™: IFA's Franchise Sales Management and Compliance Program

IFA Member Fee	Non-Member Fee
<input type="checkbox"/> \$675	<input type="checkbox"/> \$875
<input type="checkbox"/> \$675	<input type="checkbox"/> \$875
<input type="checkbox"/> \$675	<input type="checkbox"/> \$875
<input type="checkbox"/> \$675	<input type="checkbox"/> \$875
<input type="checkbox"/> \$675	<input type="checkbox"/> \$875

### SATURDAY, FEBRUARY 8, 2020

Select only one session on each day. (9am-5pm)

- Taking Your Franchise Global In Interesting Times
- FranTogether: How to Create Healthy Franchise Relations
- Advanced Financial Essentials: Driving Profitable Growth Through Multi-Unit Expansion Logistics
- Six Critical Practices of Leading a Team
- IFA Fran-Guard™: IFA's Franchise Sales Management and Compliance Program

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<input type="checkbox"/> \$675	<input type="checkbox"/> \$875
<input type="checkbox"/> \$675	<input type="checkbox"/> \$875

**TOTAL REGISTRATION FEE \$** \_\_\_\_\_

### PAYMENT

I want to pay by:  Check Please make checks payable to: Institute of Certified Franchise Executives (Federal Tax #01-062-7992)

Credit Card:  VISA  MasterCard  American Express

Name \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_ Signature \_\_\_\_\_

Card Billing Address \_\_\_\_\_

Please email [rduPont@franchise.org](mailto:rduPont@franchise.org) or mail to: INSTITUTE OF CERTIFIED FRANCHISE EXECUTIVES, Attn: Rose DuPont, 1900 K Street, NW, Suite 700 Washington, D.C., 20006.

Telephone: 202/628-8000 • Email: [rduPont@franchise.org](mailto:rduPont@franchise.org) • [www.franchise.org/cfe](http://www.franchise.org/cfe)

**CANCELLATION POLICY:** Full refunds for cancellations received in writing by December 6, 2019! Cancellations received after that date subject to a 50% penalty. No refunds after January 4, 2020. Substitutions permitted.