THE CANDIDATE QUALIFICATION PLAYBOOK

The questions to answer before you start looking at franchise brands

The best franchise search does not begin with a list of brands. It begins with clarity about the life you want to build, the role you want to play, and the financial and practical boundaries of the decision.

The goal isn't to find a franchise. It's to determine whether there's a business that fits the life you're trying to build.

1. Start With Your Why

- Why are you considering business ownership now?
- What do you want ownership to make possible that your current situation does not?
- Three years from now, what would need to be true for you to call the decision a success?
- What are you trying to move toward—not simply away from?

WHY THIS MATTERS

Your "why" does not choose a franchise for you. It gives us a standard against which opportunities can be evaluated.

2. Know Your Financial Boundaries

- Approximately how much liquid capital do you currently have available to invest?
- How much of that capital are you genuinely comfortable putting at risk?
- What is the maximum total investment you would consider if financing were involved?
- Do you know approximately where your credit score falls?
- How long could you comfortably operate before the business must replace income?

3. Define the Owner Role

- How many hours per week can you realistically devote to the business?
- Do you want to operate the business day to day, lead a manager, or build toward a more executive role?
- How do you feel about managing employees?
- How comfortable are you with sales, networking, local marketing, and business development?
- Which responsibilities do you want to own—and which do you strongly prefer to delegate?

WHY THIS MATTERS

"Semi-absentee" and "passive" are not synonyms. Every business requires ownership; the question is what kind.

4. Define the Business—Without Naming a Brand

- Do you prefer B2B, B2C, or are you open to both?
- How important are recurring or repeat revenue, scalability, or a smaller physical footprint?
- Would you rather manage people, customers, routes, assets, a location, or a manager?
- Are there industries, operating environments, or staffing models you already know you do not want?
- What characteristics matter more to you than the industry itself?

WHY THIS MATTERS

Instead of asking, "What franchise sounds interesting?" ask, "What business model fits how I want to own?"

5. The Reality Check

- Where would you realistically launch the first territory or location?
- What is your actual timeline for making a decision and beginning operations?
- Who else must be aligned with the decision—a spouse, partner, investor, or future operator?
- What income expectations do you have, and on what timeline?
- What would cause you to walk away from an otherwise attractive opportunity?
- Are you prepared to hear that waiting—or deciding not to buy—is the right answer?

WHY THIS MATTERS

A thoughtful “not this one” is progress. So is deciding to wait.

A Better Way to Begin

You do not need to know which franchise you want before we talk. In fact, I would rather you didn't.

My role is not to take a business you have already decided you want and validate the decision. It is to understand what you want ownership to make possible, identify the parameters we are working within, and help you evaluate opportunities through that lens.

Start with the life. Define the parameters. Then evaluate the business.

When you are ready, bring your answers—not perfect answers, just honest ones—to the conversation.