

The Franchisee Coaching Planner Checklist

Ready to Build a Franchisee Coaching Planner That Will Help Guide Your Coaching Sessions with Franchise Owners?

Use the checklist below to build a spreadsheet you can bring into every Field Coaching call with your franchisees to vision plan, map out action steps, and hold owners accountable!

*Scan for a free
downloadable coaching
planner spreadsheet!*



What You'll Need in Your Planner:

- ☐ Their big, hairy, audacious goal (BHAG)
- ☐ Last date completed & upcoming review date
- ☐ The long term vision for their business/life
- ☐ 3 year goals for their business
- ☐ 1 year goals for their business
- ☐ Space to map out quarterly goals for the year
- ☐ Action steps to accomplish each quarter's goals
- ☐ INC (issues, needs, challenges) list
- ☐ Steps to solve the challenges in the INC list
- ☐ A place for you (the coach) to take notes

How This Tool Helps You:

The Strategic Growth Coaching Planner is the spreadsheet we train Field Coaches to use when they are coaching franchisees.

The vision planning part is completed with your franchisee every quarter, and the INC list is what you review with franchisees in your weekly/monthly calls.

