

# Potential Franchisee Contact File

Sample Franchise Ltd

## 1. Initial Contact

<b>Personal Details</b>		
<b>Name</b>		
Title	First Name	Surname
<b>Address</b>		
<b>Contact</b>		
Home	Business	
Mobile	Fax	
Email		

<b>Initial Contact</b>		
Initial Contact from		
Franchise Opportunity from		
Initial Verbal Contact by	Date	
Follow up letter and Franchise Overview Sent		Date
Follow up contact made		Date
Notes on Follow up		
Contact moving to next stage on inquiry	Y/N	Date
Meeting Scheduled	Y/N	Date

### 3. Heads of Agreement to Purchase and Training

<b>Heads of Agreement to Purchase</b>		
Final Meeting Scheduled	<input type="text" value="Y/N"/>	Date
Notes on Meeting		
Accountants Acknowledgement Received	<input type="text" value="Y/N"/>	Date
Lawyers Acknowledgement Received	<input type="text" value="Y/N"/>	Date
Heads of Agreement to Purchase Signed	<input type="text" value="Y/N"/>	Date
Deposit Paid	<input type="text" value="Y/N"/>	Date

<b>Training</b>		
Training Scheduled	<input type="text" value="Y/N"/>	Date
Training Undertaken	<input type="text" value="Y/N"/>	Date
Notes on Training		