



## 5-Minute Franchise Ops Audit Worksheet

# Is Your Franchise Set Up to Scale?

**Score yourself across 9 critical systems every multi-location brand needs to run efficiently and grow with confidence.**

### Instructions:

- Answer Yes or No to each question.
- For every “Yes,” give yourself 1 point.
- Tally your total score to see where your operations stand.

## 9 SYSTEM AREAS (3 Questions Each)



01

## Brand Reputation (Listings & Reviews)

- YES/NO ☐ Are business hours, services, and info synced across all listing platforms?
- YES/NO ☐ Do you receive alerts for negative reviews across locations?
- YES/NO ☐ Can you monitor brand reputation trends by market?

02

## Marketing Execution

- YES/NO ☐ Can you launch both global and location-specific campaigns from one system?
- YES/NO ☐ Are SMS, email, and app campaigns tracked together?
- YES/NO ☐ Do you have clear ROI on promos and flash sales?

03

## Booking & Client Access

- YES/NO ☐ Can clients book multiple services or people in one flow?
- YES/NO ☐ Is booking available 24/7 across web, app, and social?
- YES/NO ☐ Are upsells and rebooking options built into the flow?

04

## Staff Scheduling & Labor Management

- YES/NO ☐ Are you forecasting labor needs based on demand?
- YES/NO ☐ Can staff availability, PTO, and resources be managed together?
- YES/NO ☐ Are labor costs and variance tracked in real time?



## **05 POS & Financial Reporting**

- YES/NO** \_\_\_\_\_ Is your POS system integrated with accounting and payroll?
- YES/NO** \_\_\_\_\_ Are transactions (tips, taxes, refunds) tracked automatically?
- YES/NO** \_\_\_\_\_ Can you view revenue breakdowns by service, location, and time?

## **06 Branded Mobile App**

- YES/NO** \_\_\_\_\_ Do clients have access to a branded app for booking, payments, and perks?
- YES/NO** \_\_\_\_\_ Can you send targeted notifications from the app?
- YES/NO** \_\_\_\_\_ Is in-app behavior tracked to improve retention?

## **07 Inventory Management**

- YES/NO** \_\_\_\_\_ Do you track inventory usage and trends in real time?
- YES/NO** \_\_\_\_\_ Are low-stock alerts and auto-reordering in place?
- YES/NO** \_\_\_\_\_ Can you view inventory by location and product type?

## **08 Staff & Client Record Management**

- YES/NO** \_\_\_\_\_ Are client notes, preferences, and visit history stored and accessible?
- YES/NO** \_\_\_\_\_ Can staff performance be tracked by service and revenue?
- YES/NO** \_\_\_\_\_ Can you monitor brand reputation trends by market?



09

Data & Insights

YES/NO \_\_\_\_\_ Can you access real-time dashboards for all major KPIs?

YES/NO \_\_\_\_\_ Do you track bookings, labor, marketing, and sales in one place?

YES/NO \_\_\_\_\_ Are location-level trends visible to leadership and managers?

Your Score: \_\_\_\_\_ / 27  
Where Do You Stand?

Score	Stage	What It Means
0–9	Fractured Ops	You’re likely juggling too many disconnected systems and fighting fires daily. Time to regroup.
10–18	Systemizing	You’ve built a solid base but have blind spots. There’s massive efficiency and revenue potential ahead.
19–27	Scalable Powerhouse	You’ve got the tools and workflows to grow fast—now it’s time to optimize and expand.