

FRANCHISE OPERATIONS CHECKLIST LIBRARY

Franchise Checklist Library

Use this 60-point library to guide franchise candidate approval, new-unit opening, brand standards, daily operations, people, supply chain, finance, field visits, compliance, and corrective-action closure.

Franchise system

Unit / project

Review date

Library owner

1. Franchise checklist governance, system profile, ownership, and library setup

1

Confirm the franchise system, legal entities, concepts, markets, unit formats, ownership models, and teams covered by the checklist library.

FRANCHISE LIBRARY

UNIT / OWNER

Enter

DATE / TIME

Enter

APPROVAL

Sign

Execution tip: Set document ownership, approval, scoring, evidence, and review rules before teams begin using the library.

2

Define checklist owners, intended users, review frequency, approval authority, version control, storage, and communication rules.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Set document ownership, approval, scoring, evidence, and review rules before teams begin using the library.

3

Map each checklist to the correct lifecycle stage, including candidate review, pre-opening, launch, routine operations, field support, renewal, transfer, and closure.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Set document ownership, approval, scoring, evidence, and review rules before teams begin using the library.

4

Confirm current agreements, operations manuals, brand standards, legal requirements, policies, and technology workflows are reflected in the library.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Set document ownership, approval, scoring, evidence, and review rules before teams begin using the library.

5

Define critical-failure rules, scoring, mandatory evidence, escalation, temporary controls, and corrective-action closure requirements.

CRITICAL

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Set document ownership, approval, scoring, evidence, and review rules before teams begin using the library.

6

Review previous audit scores, recurring findings, customer complaints, incidents, support requests, and business priorities to refine the library.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Set document ownership, approval, scoring, evidence, and review rules before teams begin using the library.

2. Franchise candidate, agreement, territory, and onboarding checklist

7

Verify candidate identity, legal entity, ownership, financial capacity, background checks, experience, references, and internal approval.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Complete commercial, legal, operational, and capability due diligence before approving a candidate or committing to a unit.

8

Confirm disclosure, agreement, fees, territory, rights, restrictions, renewal, transfer, termination, and dispute terms are complete and approved.

CRITICAL

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Complete commercial, legal, operational, and capability due diligence before approving a candidate or committing to a unit.

9

Record territory assumptions, unit economics, funding, investment, development timeline, dependencies, risks, and key milestones.

FRANCHISE LIBRARY

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

Execution tip: Complete commercial, legal, operational, and capability due diligence before approving a candidate or committing to a unit.

10

Confirm required advisors, permits, insurance, taxes, banking, corporate registrations, and contractual documents are arranged.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Complete commercial, legal, operational, and capability due diligence before approving a candidate or committing to a unit.

11

Verify onboarding covers the operations manual, brand standards, systems, reporting, training, supply chain, marketing, and support contacts.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Complete commercial, legal, operational, and capability due diligence before approving a candidate or committing to a unit.

12

Record conditions precedent, unresolved dependencies, named owners, due dates, required proof, and final approval before commitment.

CRITICAL

FRANCHISE LIBRARY

UNIT / OWNER

Enter

DATE / TIME

Enter

APPROVAL

Sign

Execution tip: Complete commercial, legal, operational, and capability due diligence before approving a candidate or committing to a unit.

3. Franchise opening, site readiness, launch, and handover checklist

13

Confirm site approval, lease, design, layout, accessibility, utilities, permits, fit-out scope, and opening program are complete.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Do not approve launch while any unresolved critical dependency could affect safety, legality, brand integrity, or customer readiness.

14

Verify signage, fixtures, equipment, safety systems, IT, POS, connectivity, security, and backup arrangements meet approved specifications.

CRITICAL

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Do not approve launch while any unresolved critical dependency could affect safety, legality, brand integrity, or customer readiness.

15

Confirm approved suppliers, initial inventory, packaging, uniforms, marketing materials, consumables, and opening cash are ready.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Do not approve launch while any unresolved critical dependency could affect safety, legality, brand integrity, or customer readiness.

16

Verify recruitment, contracts, staffing coverage, training, certifications, practice shifts, and manager competency are complete.

CRITICAL

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Do not approve launch while any unresolved critical dependency could affect safety, legality, brand integrity, or customer readiness.

17

Test the customer journey, product or service execution, order flow, payments, returns, complaints, cleaning, opening, and closing controls.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Do not approve launch while any unresolved critical dependency could affect safety, legality, brand integrity, or customer readiness.

18

Complete opening readiness review with critical gaps, launch conditions, approvals, support coverage, and post-opening review dates.

CRITICAL

FRANCHISE LIBRARY

UNIT / OWNER

Enter

DATE / TIME

Enter

APPROVAL

Sign

Execution tip: Do not approve launch while any unresolved critical dependency could affect safety, legality, brand integrity, or customer readiness.

4. Franchise brand standards, customer journey, and local marketing checklist

19

Inspect exterior identity, signage, logos, colours, lighting, opening hours, accessibility, cleanliness, and local approvals.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Audit the customer journey from outside the unit through service completion and capture evidence of unauthorized brand changes.

20

Verify interior layout, fixtures, wayfinding, displays, menus, collateral, digital screens, ambience, and maintenance reflect the standard.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Audit the customer journey from outside the unit through service completion and capture evidence of unauthorized brand changes.

21

Confirm products or services, packaging, uniforms, grooming, scripts, presentation, and customer communication follow approved standards.

CRITICAL

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Audit the customer journey from outside the unit through service completion and capture evidence of unauthorized brand changes.

22

Check prices, promotions, local marketing, social media, listings, campaigns, and third-party channels are approved and accurate.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Audit the customer journey from outside the unit through service completion and capture evidence of unauthorized brand changes.

23

Capture customer-journey evidence covering arrival, greeting, selection, order, payment, fulfilment, complaint handling, and farewell.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Audit the customer journey from outside the unit through service completion and capture evidence of unauthorized brand changes.

24

Record unauthorized changes, temporary exceptions, damaged brand assets, owner, due date, approval route, and required closure evidence.

FRANCHISE LIBRARY

Finding	Priority	Owner	Due	Proof

Execution tip: Audit the customer journey from outside the unit through service completion and capture evidence of unauthorized brand changes.

5. Franchise daily operations, quality, service, and customer experience checklist

- 25 Confirm opening, shift, peak-period, handover, closing, and management checks are completed by the assigned roles.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Observe live operations during a normal trading period and compare execution with the current SOP, quality, and service standard.

- 26 Verify SOPs, quality specifications, product or service availability, order accuracy, service time, and customer recovery meet targets.

CRITICAL

FRANCHISE LIBRARY

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

Execution tip: Observe live operations during a normal trading period and compare execution with the current SOP, quality, and service standard.

- 27 Check cleaning, hygiene, maintenance, waste, environmental, safety, and emergency controls are followed throughout the shift.

CRITICAL

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Observe live operations during a normal trading period and compare execution with the current SOP, quality, and service standard.

- 28 Review customer feedback, complaints, refunds, returns, incidents, service recovery, and repeat failures requiring management action.

FRANCHISE LIBRARY

Requirement / record

Current status

Owner

Evidence

Action

Execution tip: Observe live operations during a normal trading period and compare execution with the current SOP, quality, and service standard.

- 29 Confirm daily sales, labour, productivity, inventory, waste, downtime, availability, and service KPIs are reviewed and explained.

FRANCHISE LIBRARY

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

Execution tip: Observe live operations during a normal trading period and compare execution with the current SOP, quality, and service standard.

- 30 Verify operational deviations trigger containment, named ownership, due date, proof, escalation, and manager approval.

CRITICAL

FRANCHISE LIBRARY

Finding

Priority

Owner

Due

Proof

Execution tip: Observe live operations during a normal trading period and compare execution with the current SOP, quality, and service standard.

6. Franchise people, training, staffing, conduct, and support checklist

31

Confirm organization structure, staffing plan, contracts, schedules, attendance, breaks, role coverage, and employment controls are current.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Validate competence through observation and records, then link every capability gap to coaching, retraining, or staffing action.

32

Verify induction, role training, brand knowledge, product or service skills, systems, safety, compliance, and refresher training are complete.

CRITICAL

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Validate competence through observation and records, then link every capability gap to coaching, retraining, or staffing action.

33

Observe grooming, uniforms, conduct, customer interaction, teamwork, supervision, and coaching against the approved standard.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Validate competence through observation and records, then link every capability gap to coaching, retraining, or staffing action.

34

Review competency, certification, performance, recognition, discipline, turnover, absence, and succession records.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Validate competence through observation and records, then link every capability gap to coaching, retraining, or staffing action.

35

Confirm franchisees and unit managers receive current updates, support contacts, meeting cadence, issue routes, and escalation access.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Validate competence through observation and records, then link every capability gap to coaching, retraining, or staffing action.

36

Record capability gaps, coaching or recruitment actions, owners, deadlines, support required, and evidence of improved performance.

FRANCHISE LIBRARY

Finding	Priority	Owner	Due	Proof

Execution tip: Validate competence through observation and records, then link every capability gap to coaching, retraining, or staffing action.

7. Franchise supply chain, inventory, pricing, systems, and technology checklist

37

Confirm only approved suppliers, products, ingredients, materials, equipment, packaging, and service vendors are used.

CRITICAL

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Trace a sample item and transaction from approved source through receipt, storage, sale, system record, and final reconciliation.

38

Verify receiving controls cover quantity, quality, damage, condition, temperature where applicable, invoices, traceability, and rejection.

FRANCHISE LIBRARY

READING

Enter

LIMIT

Enter

DEVICE ID

Enter

Execution tip: Trace a sample item and transaction from approved source through receipt, storage, sale, system record, and final reconciliation.

39

Check storage, stock rotation, counts, transfers, adjustments, shrinkage, waste, replenishment, and inventory reconciliation.

FRANCHISE LIBRARY

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

Execution tip: Trace a sample item and transaction from approved source through receipt, storage, sale, system record, and final reconciliation.

40

Confirm pricing, product master data, promotions, tax, modifiers, availability, and channel information match approved records.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Trace a sample item and transaction from approved source through receipt, storage, sale, system record, and final reconciliation.

41

Test POS, ERP, ordering, loyalty, delivery, scheduling, reporting, user access, backups, security, and integrations.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Trace a sample item and transaction from approved source through receipt, storage, sale, system record, and final reconciliation.

42

Record outages, unauthorized purchases, inventory variances, data mismatches, owners, due dates, and corrective actions.

FRANCHISE LIBRARY

Finding	Priority	Owner	Due	Proof

Execution tip: Trace a sample item and transaction from approved source through receipt, storage, sale, system record, and final reconciliation.

8. Franchise financial controls, royalties, reporting, cash, and data checklist

43

Verify sales are fully captured across cash, cards, apps, delivery, invoices, vouchers, credits, and other approved channels.

CRITICAL

FRANCHISE LIBRARY

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

Execution tip: Reconcile source records to reported figures and investigate every unexplained sales, cash, fee, inventory, or settlement variance.

44

Check royalties, marketing fund, fees, taxes, discounts, refunds, voids, complimentary items, and settlements are calculated and supported.

FRANCHISE LIBRARY

Requirement / record

Current status

Owner

Evidence

Action

Execution tip: Reconcile source records to reported figures and investigate every unexplained sales, cash, fee, inventory, or settlement variance.

45

Review cash floats, safe drops, deposits, petty cash, access, handovers, reconciliations, approvals, and variance investigation.

CRITICAL

FRANCHISE LIBRARY

Requirement / record

Current status

Owner

Evidence

Action

Execution tip: Reconcile source records to reported figures and investigate every unexplained sales, cash, fee, inventory, or settlement variance.

46

Confirm required financial reports, supporting records, submission deadlines, retention periods, and franchisor access are maintained.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Reconcile source records to reported figures and investigate every unexplained sales, cash, fee, inventory, or settlement variance.

47

Review unit economics, margin, labour cost, waste, inventory variance, overdue payments, liquidity, and financial risk indicators.

FRANCHISE LIBRARY

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

Execution tip: Reconcile source records to reported figures and investigate every unexplained sales, cash, fee, inventory, or settlement variance.

48

Verify customer, employee, franchisee, payment, and system data are protected and accessed only by authorized users.

CRITICAL

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Reconcile source records to reported figures and investigate every unexplained sales, cash, fee, inventory, or settlement variance.

9. Franchise field visit, compliance, facilities, safety, and support checklist

49

Prepare the visit using previous scores, open actions, complaints, incidents, business performance, support history, and current priorities.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Use each field visit to verify objective evidence, contain urgent risk, support the franchisee, and agree practical follow-up.

50

Verify licences, insurance, notices, inspections, legal obligations, franchise permissions, certifications, and required records.

CRITICAL

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Use each field visit to verify objective evidence, contain urgent risk, support the franchisee, and agree practical follow-up.

51

Inspect facilities, maintenance, fire, electrical, gas, first aid, exits, security, CCTV, keys, alarms, and emergency readiness.

CRITICAL

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Use each field visit to verify objective evidence, contain urgent risk, support the franchisee, and agree practical follow-up.

52

Observe live operations, interview employees, sample transactions, review records, and capture objective time-stamped evidence.

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Use each field visit to verify objective evidence, contain urgent risk, support the franchisee, and agree practical follow-up.

53

Discuss unit performance, franchisee support needs, local risks, investment priorities, growth opportunities, and agreed assistance.

FRANCHISE LIBRARY

Requirement / record	Current status	Owner	Evidence	Action

Execution tip: Use each field visit to verify objective evidence, contain urgent risk, support the franchisee, and agree practical follow-up.

54

Classify findings, contain critical risks, assign owners, set deadlines, define support, and confirm follow-up and escalation.

CRITICAL

FRANCHISE LIBRARY

Finding	Priority	Owner	Due	Proof

Execution tip: Use each field visit to verify objective evidence, contain urgent risk, support the franchisee, and agree practical follow-up.

10. Franchise findings, corrective actions, verification, trends, and sign-off checklist

55

Record each finding with the requirement, observed condition, risk, affected unit or process, evidence, and immediate containment.

FRANCHISE LIBRARY

Finding	Priority	Owner	Due	Proof

Execution tip: Keep actions open until objective proof confirms the fix is complete, sustained, and effective across the affected process.

56

Classify findings as critical, major, minor, or observation and calculate scores using the approved rules.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Keep actions open until objective proof confirms the fix is complete, sustained, and effective across the affected process.

57

Assign every corrective action with owner, priority, due date, proof, temporary control, support, and escalation route.

CRITICAL

FRANCHISE LIBRARY

Finding	Priority	Owner	Due	Proof

Execution tip: Keep actions open until objective proof confirms the fix is complete, sustained, and effective across the affected process.

58

Verify closure through repeat visit, live evidence, records, training, maintenance, reconciliation, customer recovery, or updated process.

CRITICAL

FRANCHISE LIBRARY

Meets standard

Needs action

Critical

LIVE PHOTO

Add

Execution tip: Keep actions open until objective proof confirms the fix is complete, sustained, and effective across the affected process.

59

Review recurring brand, quality, people, inventory, financial, safety, data, and support trends across franchise units.

FRANCHISE LIBRARY

Compliant

Partial

Non-compliant

N/A

Execution tip: Keep actions open until objective proof confirms the fix is complete, sustained, and effective across the affected process.

60

Record final status, unresolved risk, support commitments, next review, franchisee representative, reviewer, date, and approvals.

CRITICAL

FRANCHISE LIBRARY

UNIT / OWNER | Enter

DATE / TIME | Enter

APPROVAL | Sign

Execution tip: Keep actions open until objective proof confirms the fix is complete, sustained, and effective across the affected process.

RUN THIS CHECKLIST LIBRARY DIGITALLY

Turn franchise controls into verified improvement

Schedule focused checklists, capture evidence, flag critical gaps, assign actions, and verify closure.

Run the Franchise
Library in Taqtics