

FRANCHISE SUPPORT AND PERFORMANCE TEMPLATE

Franchise Field Visit Checklist

Use this 60-point checklist to prepare field visits, review performance, observe customer experience, verify standards, coach unit leaders, coordinate support, assign actions, and confirm follow-up.

Franchise / unit

Visit date

Field consultant

Franchisee / manager

1. Visit planning, unit profile, objectives, and previous actions

1

Confirm the franchise unit, franchisee, format, territory, visit date, field consultant, unit manager, operating hours, and areas included in the visit.

FIELD VISIT

UNIT / FRANCHISEE

Enter

DATE / TIME

Enter

APPROVAL

Sign

💡

Execution tip: Review the unit history before arrival so the visit focuses on current risks, performance gaps, overdue actions, and useful support.

2

Review the current franchise agreement, operations manual, brand standards, service expectations, local requirements, and approved unit-specific exceptions.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

💡

Execution tip: Review the unit history before arrival so the visit focuses on current risks, performance gaps, overdue actions, and useful support.

3

Define the visit purpose, priority questions, expected outcomes, required evidence, people to meet, and time allocated for observation and discussion.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

💡

Execution tip: Review the unit history before arrival so the visit focuses on current risks, performance gaps, overdue actions, and useful support.

4

Review recent sales, customer feedback, audit results, complaints, incidents, support tickets, maintenance issues, and operational performance trends.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

💡

Execution tip: Review the unit history before arrival so the visit focuses on current risks, performance gaps, overdue actions, and useful support.

5

Check every open action from the previous visit, including owner, due date, status, evidence, escalation, and reason for any delay.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

💡

Execution tip: Review the unit history before arrival so the visit focuses on current risks, performance gaps, overdue actions, and useful support.

6

Confirm any critical concern requiring immediate attention, including safety, customer impact, unauthorized activity, serious quality failure, or brand risk.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

💡

Execution tip: Review the unit history before arrival so the visit focuses on current risks, performance gaps, overdue actions, and useful support.

2. Arrival, first impression, trading readiness, and immediate risk

7 Assess exterior appearance, signage, access, opening-hours display, parking or approach, entrance condition, cleanliness, and overall first impression.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add



Execution tip: Observe the unit before announcing detailed checks so the first impression reflects the normal customer and employee experience.

8 Confirm the unit is open, staffed, stocked, clean, safe, and operational at the expected time with critical systems and equipment working.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A



Execution tip: Observe the unit before announcing detailed checks so the first impression reflects the normal customer and employee experience.

9 Inspect customer-facing areas, counters, displays, seating, washrooms, service points, lighting, temperature, music, scent, and visible back-of-house areas.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add



Execution tip: Observe the unit before announcing detailed checks so the first impression reflects the normal customer and employee experience.

10 Check current promotions, prices, campaign materials, digital screens, menu boards, local notices, and customer information for accuracy and approval.

CRITICAL

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add



Execution tip: Observe the unit before announcing detailed checks so the first impression reflects the normal customer and employee experience.

11 Identify immediate safety, security, product-quality, accessibility, customer-data, or operational risks and confirm containment before continuing the visit.

CRITICAL

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add



Execution tip: Observe the unit before announcing detailed checks so the first impression reflects the normal customer and employee experience.

12 Record the unit manager's opening summary of current priorities, unusual events, staffing gaps, stock constraints, equipment faults, and customer concerns.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |



Execution tip: Observe the unit before announcing detailed checks so the first impression reflects the normal customer and employee experience.

### 3. Business performance, sales, targets, and commercial drivers

- 13** Review sales against target, prior period, comparable units, seasonality, trading days, local events, closures, and other known business conditions.

FIELD VISIT

ACTUAL | Enter

TARGET | Enter

VARIANCE | Enter

 **Execution tip:** Use a small set of relevant KPIs and connect each variance to the operational cause, local condition, and action that can realistically improve it.

- 14** Assess the relevant commercial drivers, such as transactions, footfall, conversion, average ticket, service volume, memberships, repeat visits, or order frequency.

FIELD VISIT

ACTUAL | Enter

TARGET | Enter

VARIANCE | Enter

 **Execution tip:** Use a small set of relevant KPIs and connect each variance to the operational cause, local condition, and action that can realistically improve it.

- 15** Review sales mix, high- and low-performing categories, product or service availability, attachment rates, upselling, promotions, and missed opportunities.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Use a small set of relevant KPIs and connect each variance to the operational cause, local condition, and action that can realistically improve it.

- 16** Check operating costs, labour deployment, waste, discounts, refunds, shrinkage, overtime, utilities, delivery charges, and other controllable variances.

FIELD VISIT

ACTUAL | Enter

TARGET | Enter

VARIANCE | Enter

 **Execution tip:** Use a small set of relevant KPIs and connect each variance to the operational cause, local condition, and action that can realistically improve it.

- 17** Confirm business reports are complete, accurate, timely, and supported by approved systems, source records, reconciliations, and manager review.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Use a small set of relevant KPIs and connect each variance to the operational cause, local condition, and action that can realistically improve it.

- 18** Agree the two or three highest-impact commercial priorities for the next review period, with measurable targets, owners, and practical actions.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Use a small set of relevant KPIs and connect each variance to the operational cause, local condition, and action that can realistically improve it.

4. Customer journey, service execution, complaints, and recovery

19

Observe greeting, acknowledgment, queue management, waiting communication, needs discovery, seating or consultation, and the first service interaction.

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Observe complete customer journeys during normal trading and record real waiting, service, handoff, and recovery behaviour rather than relying only on

20

Assess employee product or service knowledge, recommendations, policy explanations, availability updates, expected timelines, and accuracy of customer advice.

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Observe complete customer journeys during normal trading and record real waiting, service, handoff, and recovery behaviour rather than relying only on

21

Check sampled orders, bookings, transactions, production, service delivery, collection, or handoff for accuracy, timing, completeness, and presentation.

CRITICAL

FIELD VISIT

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

 **Execution tip:** Observe complete customer journeys during normal trading and record real waiting, service, handoff, and recovery behaviour rather than relying only on

22

Confirm accessibility needs, privacy, customer consent, loyalty enrolment, payment handling, and treatment of vulnerable customers follow approved standards.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Observe complete customer journeys during normal trading and record real waiting, service, handoff, and recovery behaviour rather than relying only on

23

Review recent complaints, ratings, returns, refunds, warranty issues, service recovery, manager involvement, response time, and customer follow-up.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Observe complete customer journeys during normal trading and record real waiting, service, handoff, and recovery behaviour rather than relying only on

24

Coach the unit manager on one observed service opportunity and record the expected behaviour, responsible person, practice method, and review date.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Observe complete customer journeys during normal trading and record real waiting, service, handoff, and recovery behaviour rather than relying only on

5. Brand standards, product or service quality, merchandising, and promotions

25

Verify logos, colours, signage, layout, fixtures, furniture, graphics, uniforms, packaging, and customer materials match approved brand standards.

CRITICAL

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add

 **Execution tip:** Compare the live unit with current approved references and sample several high-volume or high-visibility products, services, displays, and campaign touchpoints.

26

Inspect visual merchandising, displays, planograms, facings, stock density, hero placement, price communication, cleanliness, and campaign execution.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add

 **Execution tip:** Compare the live unit with current approved references and sample several high-volume or high-visibility products, services, displays, and campaign touchpoints.

27

Confirm the approved assortment, menu, service package, sizes, variants, add-ons, availability rules, and discontinued-item controls are followed.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Compare the live unit with current approved references and sample several high-volume or high-visibility products, services, displays, and campaign touchpoints.

28

Sample product or service quality against approved specification, recipe, quantity, assembly, presentation, packaging, finishing, and customer promise.

CRITICAL

FIELD VISIT

ACTUAL

Enter

TARGET

Enter

VARIANCE

Enter

 **Execution tip:** Compare the live unit with current approved references and sample several high-volume or high-visibility products, services, displays, and campaign touchpoints.

29

Verify only approved suppliers, materials, ingredients, consumables, tools, equipment, and substitutions are used within authorized purchasing channels.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Compare the live unit with current approved references and sample several high-volume or high-visibility products, services, displays, and campaign touchpoints.

30

Check local campaigns, offers, events, partnerships, claims, social content, and community activity have approval and match current terms and dates.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Compare the live unit with current approved references and sample several high-volume or high-visibility products, services, displays, and campaign touchpoints.

## 6. People, staffing, leadership, training, and engagement

- 31** Review staffing levels, manager coverage, role allocation, shift planning, peak demand, leave, overtime, vacancies, and succession for key positions.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Talk with employees at different levels and observe live work so the visit tests leadership, confidence, capability, and culture rather than paperwork alone.

- 32** Confirm new employees complete required induction, brand, product, service, system, safety, privacy, and role training before working independently.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Talk with employees at different levels and observe live work so the visit tests leadership, confidence, capability, and culture rather than paperwork alone.

- 33** Check competency observations, coaching, refresher training, authorizations, performance discussions, retraining, and closure of known skill gaps.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Talk with employees at different levels and observe live work so the visit tests leadership, confidence, capability, and culture rather than paperwork alone.

- 34** Inspect uniforms, name badges, grooming, task-specific PPE, employee conduct, personal devices, and presentation against approved standards.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO Add

 **Execution tip:** Talk with employees at different levels and observe live work so the visit tests leadership, confidence, capability, and culture rather than paperwork alone.

- 35** Assess the unit manager's briefing, delegation, floor presence, problem solving, feedback, action follow-up, communication, and accountability.

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Talk with employees at different levels and observe live work so the visit tests leadership, confidence, capability, and culture rather than paperwork alone.

- 36** Speak with employees about workload, tools, clarity, recognition, concerns, support, safety, and improvement ideas, then record themes requiring action.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Talk with employees at different levels and observe live work so the visit tests leadership, confidence, capability, and culture rather than paperwork alone.

## 7. Inventory, procurement, waste, cash, and record controls

**37** Inspect receiving records, quantities, condition, specifications, batch or serial details, temperatures where relevant, shortages, damage, and rejection decisions.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Trace a sample item or transaction from approved source through receipt, storage, sale or use, payment, adjustment, and retained evidence.

**38** Verify storage, segregation, security, labels, expiry or shelf-life, FIFO or FEFO, replenishment, quarantined items, returns, and employee property controls.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add

 **Execution tip:** Trace a sample item or transaction from approved source through receipt, storage, sale or use, payment, adjustment, and retained evidence.

**39** Compare sampled physical stock with system balances and review waste, spoilage, shrinkage, breakage, transfers, giveaways, and unexplained adjustments.

CRITICAL

FIELD VISIT

ACTUAL Enter

TARGET Enter

VARIANCE Enter

 **Execution tip:** Trace a sample item or transaction from approved source through receipt, storage, sale or use, payment, adjustment, and retained evidence.

**40** Check approved prices, taxes, fees, discounts, bundles, loyalty benefits, refunds, voids, overrides, complimentary items, and supporting authorization.

CRITICAL

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Trace a sample item or transaction from approved source through receipt, storage, sale or use, payment, adjustment, and retained evidence.

**41** Verify cash counts, tills, safe access, deposits, payment terminals, settlements, petty cash, chargebacks, and end-of-shift reconciliation are controlled.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Trace a sample item or transaction from approved source through receipt, storage, sale or use, payment, adjustment, and retained evidence.

**42** Confirm checklists, logs, approvals, timestamps, photos, transaction records, support tickets, and exception reports are complete and traceable.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Trace a sample item or transaction from approved source through receipt, storage, sale or use, payment, adjustment, and retained evidence.

8. Facilities, systems, maintenance, safety, and security

43

Inspect fixtures, counters, furniture, displays, production or service equipment, lighting, HVAC, utilities, and customer touchpoints for condition and safe operation.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add

 **Execution tip:** Test a representative sample of customer-facing equipment, critical systems, and safeguards, then raise immediate action for anything affecting safety or trading.

44

Review preventive maintenance, calibration, cleaning services, repair history, vendor visits, open work orders, repeat defects, downtime, and spare-part needs.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Test a representative sample of customer-facing equipment, critical systems, and safeguards, then raise immediate action for anything affecting safety or trading.

45

Confirm internet, POS, booking, CRM, loyalty, ordering, payment, screens, printers, communications, and backup processes work reliably.

CRITICAL

FIELD VISIT

SYSTEM / DEVICE

Enter

OBSERVED

Enter

EXPECTED

Enter

 **Execution tip:** Test a representative sample of customer-facing equipment, critical systems, and safeguards, then raise immediate action for anything affecting safety or trading.

46

Check fire, emergency, first-aid, accessibility, health, safety, evacuation, incident, and mandatory signage and controls are current and unobstructed.

CRITICAL

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add

 **Execution tip:** Test a representative sample of customer-facing equipment, critical systems, and safeguards, then raise immediate action for anything affecting safety or trading.

47

Verify CCTV, keys, access cards, doors, cash areas, stock rooms, passwords, customer-data locations, and opening or closing security controls.

CRITICAL

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Test a representative sample of customer-facing equipment, critical systems, and safeguards, then raise immediate action for anything affecting safety or trading.

48

Inspect staff areas, storage, waste zones, delivery access, washrooms, utilities, and service spaces for cleanliness, supplies, damage, odour, and organization.

FIELD VISIT

Meets standard

Needs action

Critical

LIVE PHOTO

Add

 **Execution tip:** Test a representative sample of customer-facing equipment, critical systems, and safeguards, then raise immediate action for anything affecting safety or trading.

9. Franchisee discussion, local market opportunities, support, and action

49

Discuss the franchisee's view of current performance, operational barriers, customer trends, competition, local demand, team capability, and investment priorities.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Separate issues the unit can solve locally from issues requiring franchisor support, then agree a focused plan instead of creating a long unprioritized list.

50

Review local market activity, nearby competition, community opportunities, catchment changes, delivery demand, partnerships, and approved growth opportunities.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Separate issues the unit can solve locally from issues requiring franchisor support, then agree a focused plan instead of creating a long unprioritized list.

51

Identify support needed from operations, training, marketing, supply chain, finance, IT, maintenance, product, quality, or senior management.

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Separate issues the unit can solve locally from issues requiring franchisor support, then agree a focused plan instead of creating a long unprioritized list.

52

Confirm required franchisor decisions, approvals, resources, visits, training, repairs, campaign support, or commercial follow-up have clear owners and dates.

FIELD VISIT

On track

Needs action

Critical

N/A

 **Execution tip:** Separate issues the unit can solve locally from issues requiring franchisor support, then agree a focused plan instead of creating a long unprioritized list.

53

Agree a short prioritized action plan balancing immediate risk, customer impact, business performance, brand standards, people capability, and long-term improvement.

CRITICAL

FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|                   |        |       |          |        |

 **Execution tip:** Separate issues the unit can solve locally from issues requiring franchisor support, then agree a focused plan instead of creating a long unprioritized list.

54

Confirm the franchisee and unit manager understand each commitment, success measure, evidence requirement, escalation route, and next review date.

FIELD VISIT

UNIT / FRANCHISEE

Enter

DATE / TIME

Enter

APPROVAL

Sign

 **Execution tip:** Separate issues the unit can solve locally from issues requiring franchisor support, then agree a focused plan instead of creating a long unprioritized list.

## 10. Findings, ownership, verification, follow-up, and sign-off

- 55** Record each finding with the requirement or objective, observed condition, business or customer impact, location, evidence, and immediate correction completed. FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|-------------------|--------|-------|----------|--------|

 **Execution tip:** Keep actions open until objective evidence confirms the issue is corrected, the result is sustained, and repeat causes have been addressed.

- 56** Classify findings as critical, high, medium, low, opportunity, or support request using approved priority, escalation, and reporting rules. CRITICAL FIELD VISIT

On track Needs action Critical N/A

 **Execution tip:** Keep actions open until objective evidence confirms the issue is corrected, the result is sustained, and repeat causes have been addressed.

- 57** Assign every action to a named owner with priority, due date, measurable outcome, required proof, support dependency, and escalation route. CRITICAL FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|-------------------|--------|-------|----------|--------|

 **Execution tip:** Keep actions open until objective evidence confirms the issue is corrected, the result is sustained, and repeat causes have been addressed.

- 58** Verify closure through repeat visit, live photos, system data, sales results, repair proof, retraining, customer recovery, or reviewer approval. CRITICAL FIELD VISIT

Meets standard Needs action Critical LIVE PHOTO Add

 **Execution tip:** Keep actions open until objective evidence confirms the issue is corrected, the result is sustained, and repeat causes have been addressed.

- 59** Summarize strengths, priority gaps, franchisee commitments, franchisor commitments, unresolved risks, and the focus for the next field visit. FIELD VISIT

| Observation / KPI | Status | Owner | Evidence | Action |
|-------------------|--------|-------|----------|--------|
|-------------------|--------|-------|----------|--------|

 **Execution tip:** Keep actions open until objective evidence confirms the issue is corrected, the result is sustained, and repeat causes have been addressed.

- 60** Record the final visit status, critical issues, agreed actions, next review date, franchisee or manager, field consultant, reviewer, date, time, and signatures. CRITICAL FIELD VISIT

UNIT / FRANCHISEE Enter

DATE / TIME Enter

APPROVAL Sign

 **Execution tip:** Keep actions open until objective evidence confirms the issue is corrected, the result is sustained, and repeat causes have been addressed.

RUN THIS CHECKLIST DIGITALLY

Turn field visit observations into verified improvement

Capture KPIs and evidence, coordinate support, assign actions, and verify progress.

Try This Checklist  
in Taqtics