

wednesdaywise

WEBINARS

The Five Keys To Unlock Franchise Location Data, Profits, and Expansive Brand Growth

January 22, 2025

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Welcome

Qvinci was founded on a simple idea: Provide franchise brands with a cost-effective, ERP-like solution that delivers:

- Franchise financial insights and data consolidation
- Coaching franchise owners for performance
- Franchise brand compliance and expansion

All with a cost-effective and simple-to-use solution.

The Thought Leadership Agenda



1. The 3 Pillars
2. The Challenges
3. The Keys to Success
4. Next Steps
5. QuickBooks Plus Qvinci
6. Special Discount
7. Q&A

Presenters



John Logan

Chief Sales Officer
Qvinci Software



Brad Adams

CEO / Moderator
Qvinci Software



Charles Nagel

Founder / CIO
Qvinci Software

Top Franchise Brands Trust Qvinci!



The 3 Pillars For Profitably Scaling Franchise Growth

Hundreds of brands, of all sizes, and across all markets utilize the 3 pillars of Qvinci's Franchise Financial Performance Management Solution to profitably scale growth.

PILLAR 1 – Automates the processes around data collection, consolidation, and patented account mapping to a brand standard allowing staff to repurpose time wasted on manual processes towards analyzing near real-time homogeneous data, identifying locations “at risk,” and performance coaching.

PILLAR 2 – Combines communicating financial performance in a manner franchise owners understand and can act on with customizable coaching tools that effectively measure, monitor, and improve unit-level performance.

PILLAR 3 – Provides the enhanced visibility and actionable insights needed to facilitate a culture of transparency, trust, and collaboration proven to deliver improved compliance, increased profits, and sustainable expansion.



The Challenges Brands Face in Unlocking Location Data, Unit Profitability, Compliance, and Scalable Growth

1. Accessing timely and reliable franchise location data
2. Operational over-reliance on time-consuming manual processes, workflows, and spreadsheets
3. Establishing and maintaining brand-defined KPIs, business intelligence, benchmarking, ranking, cashflow, compliance, and predictive analytics standards necessary for driving profitable growth
4. Finding and deploying the right performance management and coaching tools to effectively measure, monitor and , communicate financial performance in a manner everyone can understand and act on
5. Fostering a brand culture of transparency, collaboration, compliance, profits, and expansive growth



1

The Challenges

Accessing Timely and Reliable Franchise Location Data

- a) Excess of manual processes and workflows limit speed, accuracy, and reliability of location data
- b) Disparate processes from one franchise location to the next make analysis difficult, if not impossible
- c) No automated processes for the collection, consolidation, and mapping of franchise location data limits the ability to make data-driven decisions that drive compliance, profits, and growth



2

The Challenges

Over-Reliance on Time-Consuming Manual Processes, Workflows, and Spreadsheets Hinders Brand Compliance, Profits, and Growth

- a) Spreadsheets abound, slowing down workflows and increasing chaos and risk of human error
- b) Slow turnaround time on data needed to drive profitability
- c) Manual processes are not scalable



3

The Challenges

Establishing and Maintaining Brand-Defined KPIs and Business Intelligence Standards

- a) No tools that drive and grade franchise ecosystem compliance
- b) KPIs are too general and not based on specific ecosystem metrics
- c) Lack of franchise-wide standards limit brand ability to scale and grow efficiently

4

The Challenges

Finding and Deploying the Right Tools and Technologies To Identify and Communicate Financial Performance in a Manner Everyone Can Understand and Act On

- a) Complex, mid-market accounting platforms can:
 - Result in loss of data
 - Negatively impact business during long, complex implementations due to inefficiencies and loss of focus
 - Lack integrations, forcing team to abandon familiar applications and train on new ones

- b) Platforms often lead to:
 - Extensive training/steep learning curve, requiring too much time and money
 - Large upfront investment, including initial setup fees and increased operating costs throughout the lifecycle of the platform
 - A negative, costly impact on business during long, complex implementations due to inefficiencies and loss of focus



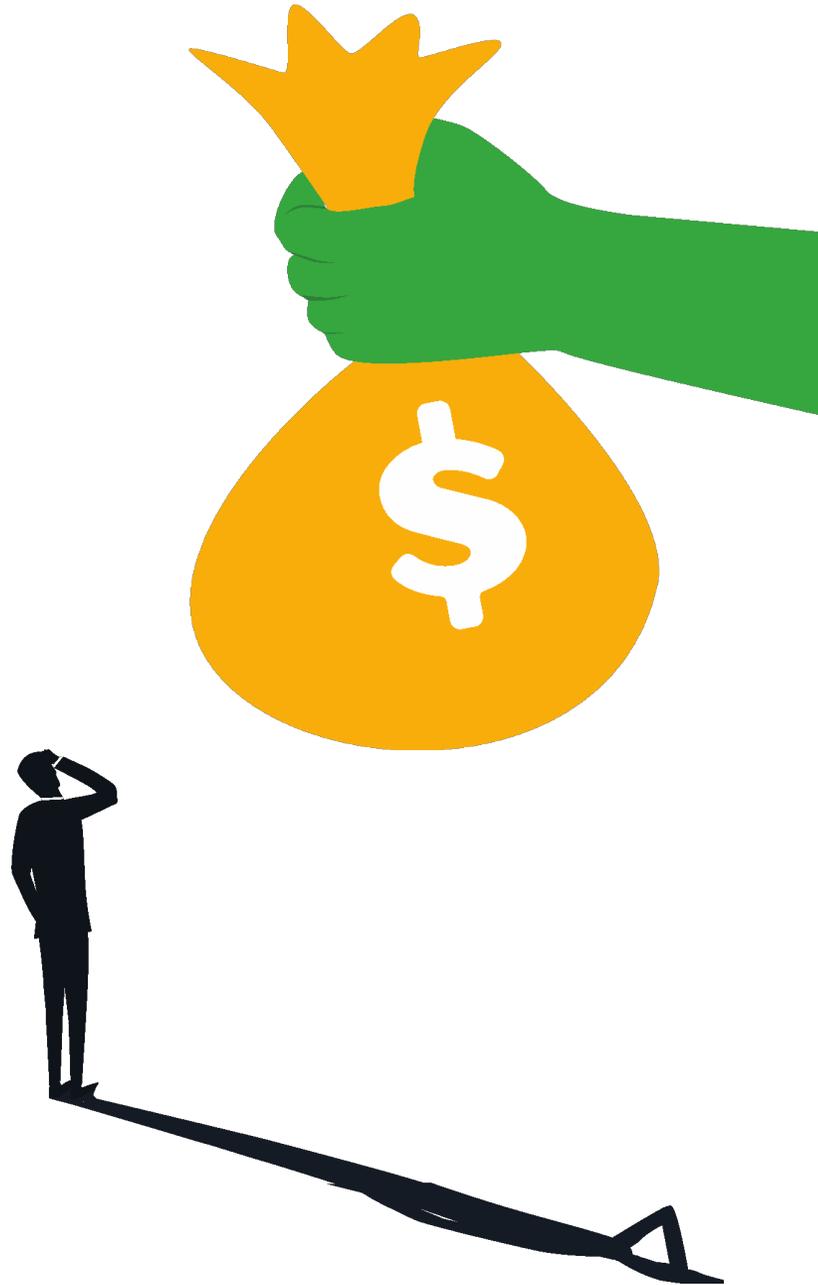


5

The Challenges

Fostering a Brand Culture of Transparency, Collaboration, Compliance, Profits, and Expansive Growth

- a) Limited tools that are easy to understand and implement, and that drive a culture of brand growth and franchise owner profitability
- b) No automated processes for the collection, consolidation, and mapping of franchise location data to a brand-defined standard for accurate comparisons
- c) Lack of customization leads to a one-size-fits-all platform that is not scalable
- d) Difficulty identifying and communicating best practices to all franchise owners



The Five Keys To Amplifying Location Data, Brand Compliance, Profits, and Expansive Growth

1. **Near real-time data collection, consolidation, and mapping** solution that provides the financial insights everyone can understand, make sense of, and act on
2. **Automate manual processes**, workflows, and spreadsheets to streamline operations and franchise owner collaboration
3. **Implement a solution** that will establish and maintain brand-defined standards for KPIs, business intelligence, and predictive analytics standards necessary for driving profitable growth
4. **Utilize tools and technologies to** effectively communicate and monitor profitability, growth, and brand compliance in a manner everyone can understand, make sense of, and act on
5. **Cultivate a brand culture** of transparency, collaboration, compliance, profits, and expansive growth

1

The Key

Implement a Near Real-Time Data Collection, Consolidation, and Mapping Solution

- Unifies data in one place
- Integrates easily with commonly used business solutions
- Fast implementation and adoption
- Has a user-friendly interface for easy adoption
- Presented in the Franchise Wellness Dashboard
- Provides the financial insights everyone can understand, make sense of, and act on

2

The Key

Automate Manual Processes, Workflows, and Spreadsheets To Streamline Operations and Franchise Owner Collaboration

- Create cohesion across your franchise data ecosystem to optimize processes, uncover inefficiencies, and improve expense management
- Leverage data-driven insights to increase operational collaboration, efficiencies, and profits
- Identify at-risk locations and take proactive steps to correct
- Identify optimum franchise owners for expansion to drive profitability

3

The Key

Implement a Solution That Establishes, Maintains, and Tracks Brand-Defined Standards

- Gets everyone on the "same page"
- Time saved can be repurposed to focus on culture and profitable growth
- Empowers brand with actionable data and insights
- Necessary for driving compliance, profits, and growth
- Presented in the KPI Scorecard package and *What If* Cashflow & Forecasting Optimizer

4

The Key

Utilize Tools and Technologies for Effective Communication in a Manner Everyone Can Understand, Make Sense of, and Act On

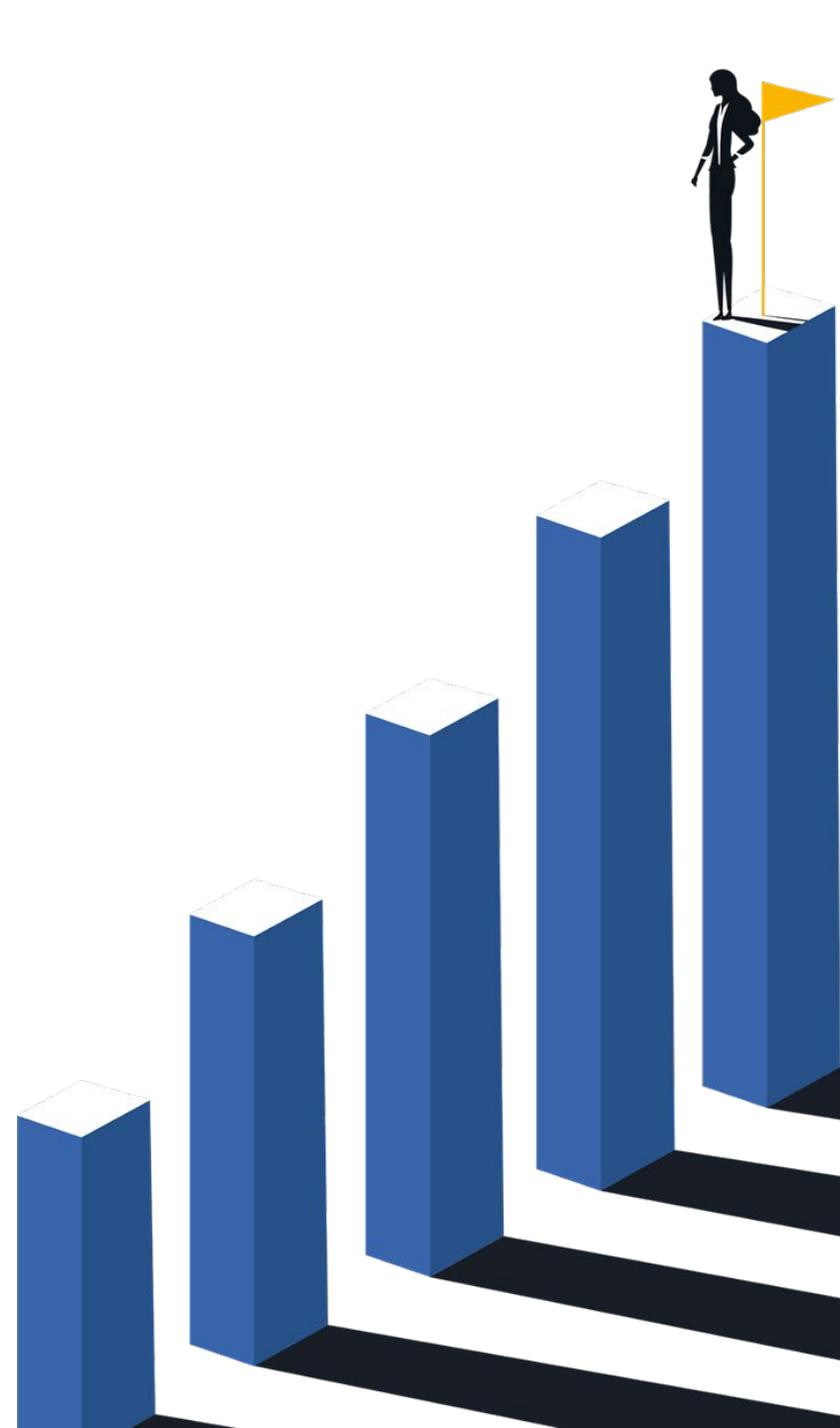
- Solutions are only effective when everyone can take part
- Avoid platforms with steep learning curves and extended onboarding
- Do not adopt one-size-fits-all applications - customization is a must
- Opt for user-friendly interfaces with a focus on collaboration and communication
- Make sure everyone understands the ROI of deploying a new solution

5

The Key

Cultivate a Brand Culture of Transparency, Collaboration, Compliance, Profits, and Expansive Growth

- Communicate vision, mission, and goals
- The right solution is easy to understand and implement, and drives a culture of brand growth and franchise owner profitability:
 - Provides the visibility needed to easily spot at-risk locations
 - Enables the monitoring, ranking, and benchmarking of specifics against the average and top 20% of all locations
 - Gives you the ability to easily identify and clearly communicate best practices to all franchise owners



How the Right Tools and Technologies Drive Brand Compliance, Profits, and Expansive Growth

1

Franchise Financial Insights and Data Collection

2

Franchise Owner Performance Coaching

3

Brand Compliance and Expansion



How the Right Tools and Technologies Drive Brand Compliance, Profits, and Expansive Growth

1

Franchise Financial Insights and Data Collection

Franchise Wellness Dashboard



Franchise Wellness Dashboard



- Focuses on the 10 key ratios that drive profitable growth
- Displays **GREEN** & **RED** percentage changes that alert leadership and franchisees to **favorable** / **unfavorable** trending across multiple time periods
- Users can drill down to an advisory analysis card for trending details
- Identifies which franchise owners have their books accurate and up-to-date



Franchise Wellness Dashboard

Profit & Loss						Balance Sheet			
Total Income	COGS	Gross Profit Margin	Top 10 Expen...	Net Income	Net Profit Margin	Months of Cash	Cash	A/R	A/P
34%	0%	0%	50%	(47)%	(60)%	(51)%	(0)%	2%	6%
0%	2%	(0)%	0%	(1)%	(1)%	2%	3%	1%	3%
7%	(2)%	4%	1%	82%	70%	(3)%	0%	8%	3%

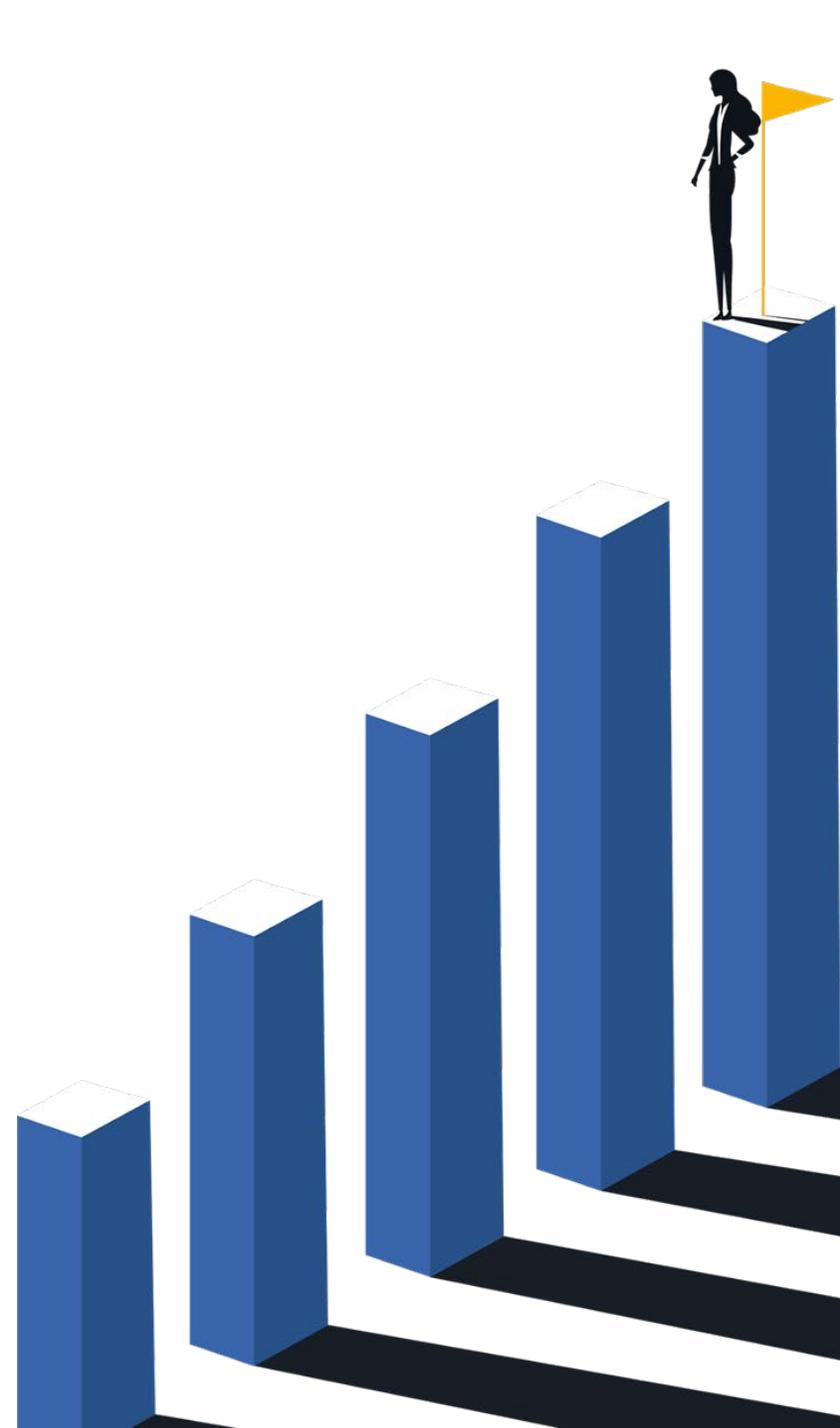


Advisory Analysis
50.05% ×

Advisory Analysis Card

- Click on any cell
- See what's causing the trend

Top 10 Expenses			
	Reporting Month		Prior Month
	Dec 2023		Nov 2023
Dental Supplies	8.32 %	Dental Supplies	5.55 %
Associate Salary Expense	7.99 %	Associate Salary Expense	5.34 %
Consulting	5.37 %	Consulting	3.59 %
Staff Expenses	5.34 %	Staff Expenses	3.56 %
Admin Staff Payroll	4.55 %	Admin Staff Payroll	2.98 %
Rent Expense	4.44 %	Rent Expense	2.96 %
Hygienist Wages	4.02 %	Hygienist Wages	2.69 %
Assistant Payroll	3.65 %	Assistant Payroll	2.44 %
Laboratory Fees	3.52 %	Laboratory Fees	2.35 %
Associate Contract Labor	2.20 %	Associate Contract Labor	1.47 %
Top 10 Expenses	49.41 %	Top 10 Expenses	32.93 %



How the Right Tools and Technologies Drive Brand Compliance, Profits, and Expansive Growth

2

Franchise Owner Performance Coaching

- KPI Scorecard
- Performance Dashboard
- Big 4 / Top 10 Analysis
- Actual + Budget Forecasting
- And More!

PC

The KPI Scorecard



- Customizable to highlight the KPIs and ideal ranges that most impact location-level profitable growth
- View dollars (\$) and percentage (%) of income from the same scorecard
- Period-over-period trend analysis
- Reporting month, rolling 3-month, and FYTD comparative scorecard versions
- Includes an expense control analysis and graphed income, net income, and cashflow (tabs not shown)



The KPI Scorecard

	Ideal Range ^(?)		Entity Performance ^{****}			
Income Analysis**	Low	High	Reporting FYTD	Prior FYTD	Trend	Last 12 Months Avg
Ortho Sales	\$979,231	\$1,019,200	\$995,792	\$934,953	✓	\$999,216
Cleaning	\$858,582	\$893,626	\$908,783	\$828,697	✓	\$876,104
Prosthetic Sales	\$513,508	\$534,467	\$544,183	\$446,480	✓	\$523,988
Teeth Whitening	\$297,551	\$309,696	\$295,320	\$271,750	✓	\$303,624
Lab Results	\$189,803	\$197,550	\$194,734	\$167,734	✓	\$193,677
COGS Analysis	Low	High	Reporting FYTD	Prior FYTD	Trend	Last 12 Months Avg
Ortho Costs	\$443,377	\$461,474	\$443,221	\$457,428	✓	\$452,426
Prosthetic Costs	\$225,650	\$234,861	\$240,386	\$195,900	✗	\$230,255
Hygienists Salary	\$89,700	\$93,361	\$92,121	\$88,578	✗	\$91,531
Laboratory Costs	\$78,961	\$82,184	\$85,712	\$46,420	✗	\$80,573
Teeth Whitening Costs	\$32,691	\$34,025	\$33,308	\$23,234	✗	\$33,358
Expense Analysis***	Low	High	Reporting FYTD	Prior FYTD	Trend	Last 12 Months Avg
Dentist Salary	\$163,091	\$169,748	\$167,493	\$161,051	✗	\$166,419
Dental Assistants Salary	\$109,271	\$113,731	\$112,220	\$107,904	✗	\$111,501
Various Costs	\$81,411	\$84,734	\$82,031	\$66,929	✗	\$83,073
Rent Expense	\$72,520	\$75,479	\$73,110	\$72,091	✗	\$74,000
Staff Salary	\$70,618	\$73,501	\$72,525	\$69,735	✗	\$72,060
KPI Analysis	Low	High	Reporting FYTD	Prior FYTD	Trend	Last 12 Months Avg
COGS Ratio	29.1%	30.3%	29.6%	29.7%	✓	29.7%
Gross Margin Ratio	68.9%	71.7%	70.4%	70.3%	✓	70.3%
Expense Ratio	21.5%	22.4%	21.8%	25.6%	✓	21.9%
Profitability Ratio (Net Income)	48.7%	50.7%	49.7%	46.4%	✓	49.7%
Months of Cash	3.0	6.0	68.8	65.7	✓	69.0

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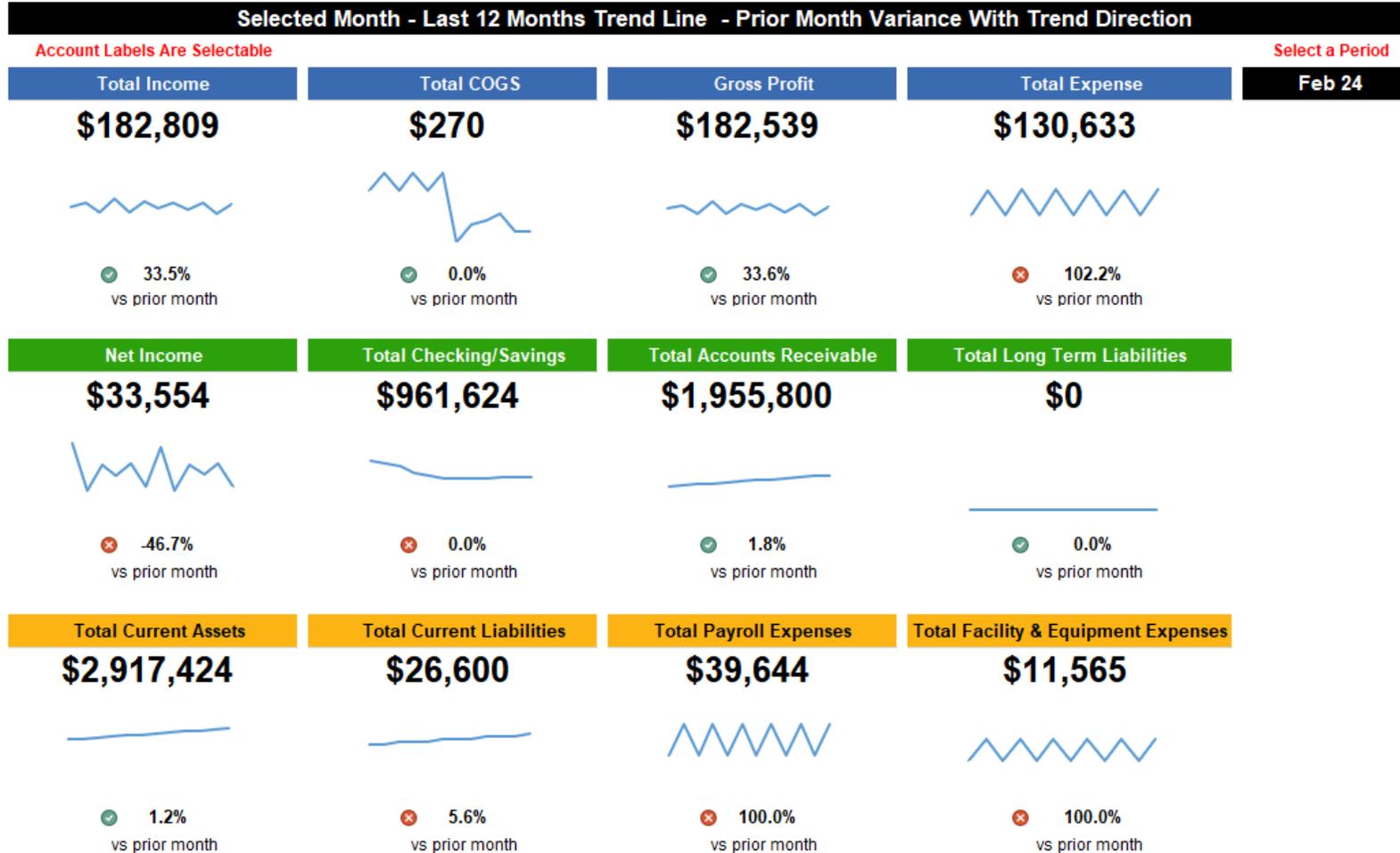
Performance Dashboards



- Customizable to highlight the KPIs that most impact location-level profitable growth
- Selectable periods let users see trending for previous periods
- Has monthly, rolling 3-months, and fiscal YTD views (tabs not shown)



Performance Dashboard





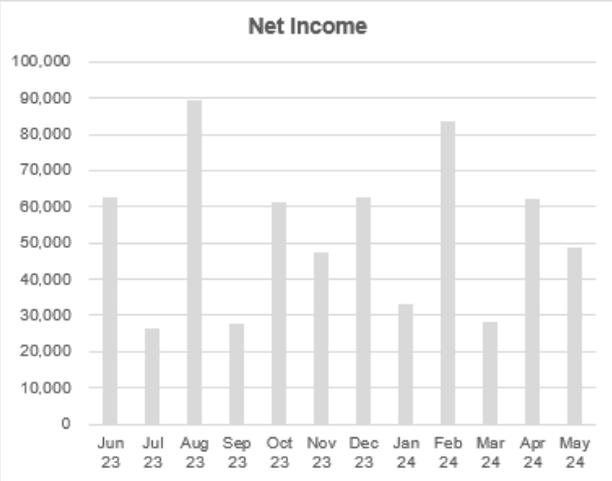
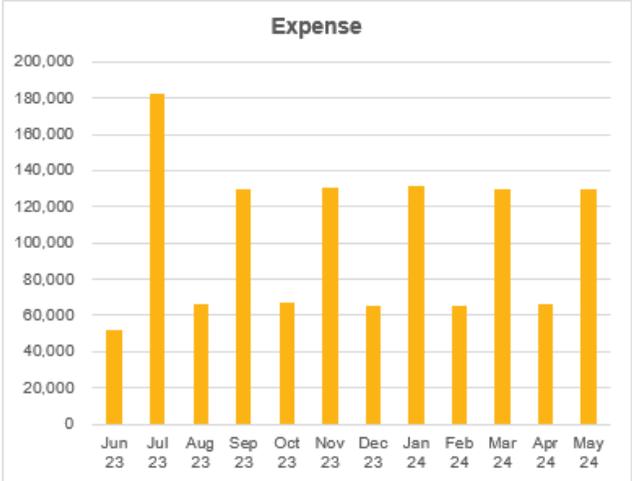
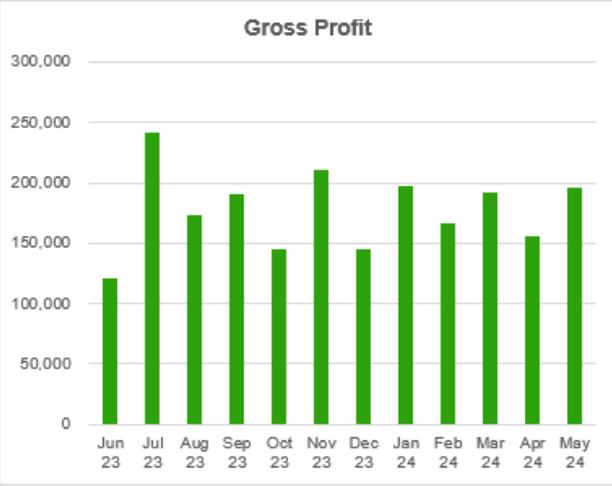
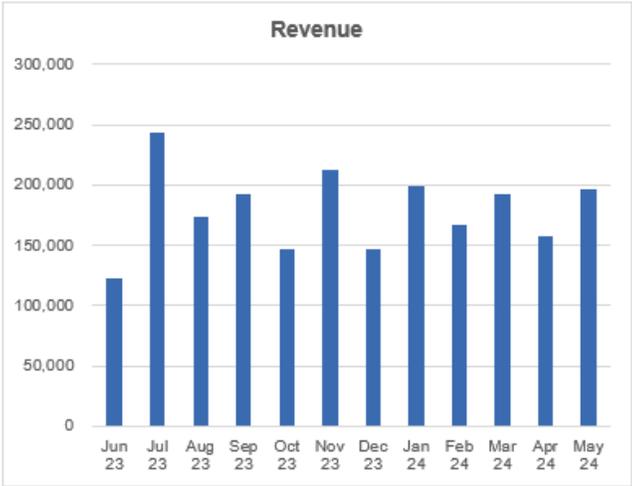
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Big 4 / Top 10 Analysis

- Illustrates trending for revenue, gross profit, expenses, and net income
- Selectable periods (this FYTD; prior FYTD; rolling 12-months)
- View income, CoGS, and expenses from the drop-down
- Hover bar chart to see financial data



Big 4 Analysis



Select a Period

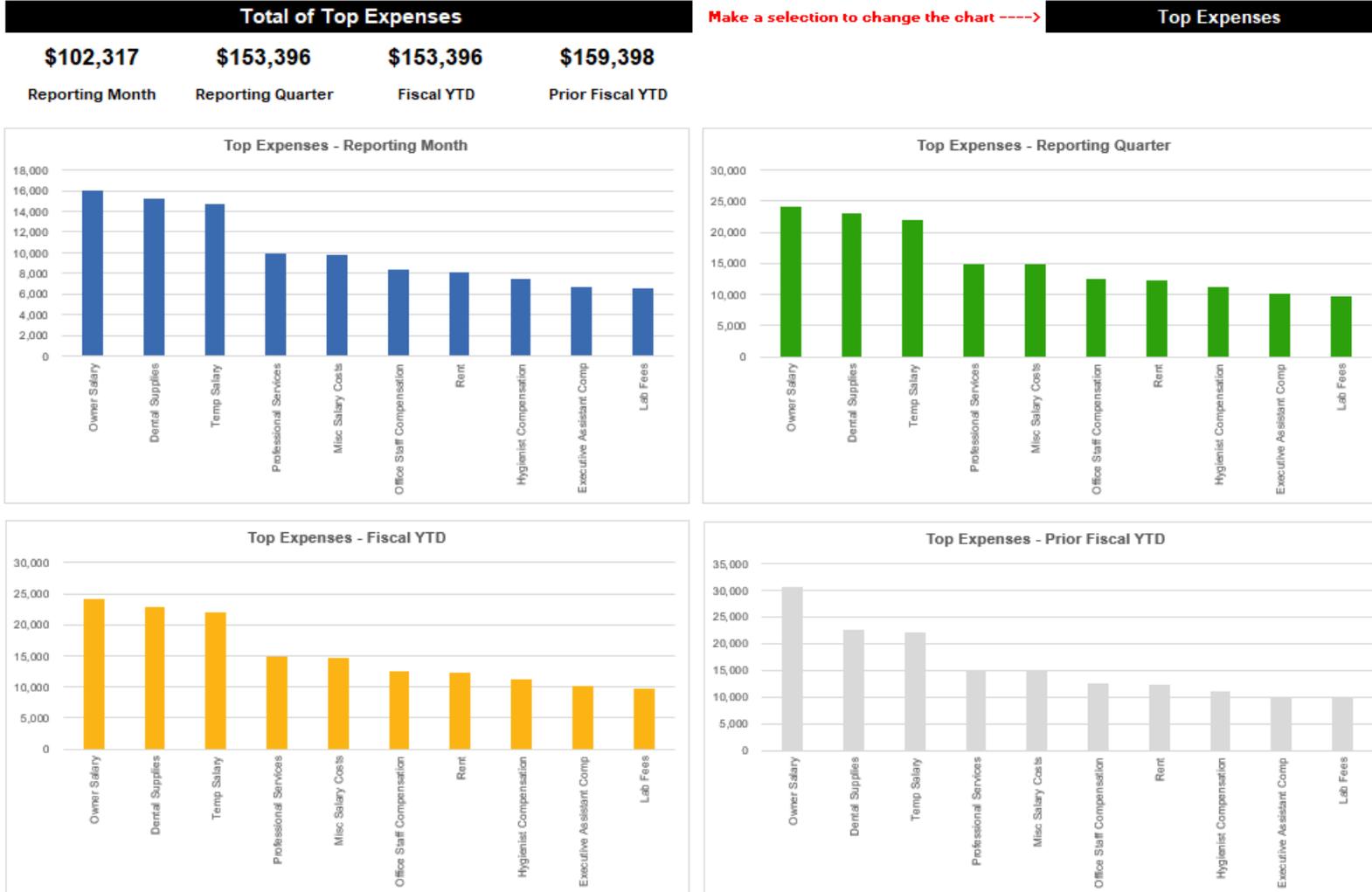
Last 12 Months

Months Sorted

- Jun 23
- Jul 23
- Aug 23
- Sep 23
- Oct 23
- Nov 23
- Dec 23
- Jan 24
- Feb 24
- Mar 24
- Apr 24
- May 24



Top 10 Analysis





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Budget Forecasting

- Upload budget from Excel into Qvinci or upload them into QuickBooks
- Enables efficient knowledge sharing between coaches and franchise owners via Qvinci's collaborative tools
- Supports a culture of continuous learning and improvement
- Data-driven insights to increase collaboration, efficiencies, and profits



Actual + Budget Forecasting

	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2023 - Dec 2023	Budget	\$ Diff
	Actual	Budget	Budget	Budget	Total										
Ordinary Income/Expense															
Income															
Other Income	194	388	194	388	194	388	194	388	194	194	194	581	3,488	3,269	219
Patient Fees	173,299	191,549	145,999	211,849	145,999	198,549	166,299	191,549	156,127	115,211	121,911	242,332	2,060,670	1,998,038	62,632
Total Income	173,492	191,937	146,192	212,237	146,192	198,937	166,492	191,937	156,320	115,404	122,104	242,913	2,064,158	2,001,307	62,851
Cost of Goods Sold															
Product Material	800	942	800	942	800	942	0	142	181	942	800	942	8,235	6,863	(1,372)
Widget Assembly ¹	543	858	543	858	543	858	0	316	359	858	543	858	7,138	5,608	(1,530)
Total COGS	1,343	1,801	1,343	1,801	1,343	1,801	0	458	540	1,801	1,343	1,801	15,373	12,470	(2,903)
Gross Profit	172,150	190,136	144,850	210,436	144,850	197,136	166,492	191,479	155,780	113,604	120,762	241,112	2,048,784	1,988,836	59,948
Expense															
Business Expenses															
Accounting	0	0	0	0	0	0	0	0	0	0	0	0	0	10,672	10,672
Bank Charges	583	1,166	583	1,166	583	1,166	583	1,166	583	583	583	1,750	10,498	905	(9,593)
Building Costs	51	102	51	102	51	102	51	102	51	51	51	153	916	12,216	11,300
Disposal Costs	744	1,488	744	1,488	744	1,488	744	1,488	744	744	744	2,232	13,394	633	(12,760)
Equipment	553	1,107	553	1,107	553	1,107	553	1,107	553	553	553	1,260	8,759	2,616	(6,143)
Insurance – Worker's Comp	155	310	155	310	155	310	155	310	155	155	155	465	2,793	2,045	(748)
Interest Expense	101	202	101	202	101	202	101	202	101	101	101	303	1,820	28,819	26,999
Office Supply	943	1,886	943	1,886	943	1,886	943	1,886	943	943	943	2,828	16,970	6,622	(10,347)
Other Insurance	362	724	362	724	362	724	362	724	362	362	362	1,085	6,512	1,095	(5,417)
Postage and Delivery	69	138	69	138	69	138	69	138	69	69	69	208	1,245	1,356	111
Printing Costs	76	152	76	152	76	152	76	152	76	76	76	228	1,370	688	(683)
Processing Costs	39	78	39	78	39	78	39	78	39	39	39	118	706	3,965	3,259
Professional Services	76	153	76	153	76	153	76	153	76	76	76	229	1,373	25,592	24,219
Retirement Plan Costs	4,909	9,817	4,909	9,817	4,909	9,817	4,909	9,817	4,909	909	909	10,726	76,357	346	(76,011)
Taxes	18	37	18	37	18	37	18	37	18	18	18	55	332	5,302	4,969
Tech Expenses	666	1,332	666	1,332	666	1,332	666	1,332	666	266	266	1,598	10,786	8,716	(2,071)
Uniforms	612	1,225	612	1,225	612	1,225	612	1,225	612	612	612	1,837	11,022	1,555	(9,467)
Total Business Expenses	76	152	176	152	76	252	76	152	176	76	76	328	1,769	150,057	148,288

How the Right Tools and Technologies Drive Brand Compliance, Profits, and Expansive Growth



3

Brand Compliance and Expansion



Break-Even Analysis



- Designed to allow brand leadership and franchise coaches to partner with new or underperforming franchisees to illustrate the operational adjustments needed to attain and exceed financial break-even
- Automatically populates *controllable* and *non-controllable* expenditures
- The “*What If*” side allows franchise coaches and franchise owners to collaborate by manually adjusting income, CoGS, expenses, and other expenses until a break-even game plan is agreed upon

PM

Ranking and Benchmarking Analysis

- Customizable to highlight the KPIs that most impact unit-level profitable growth for your business model
- Filterable to compare like-type peer performance comparisons
- Shows trending for the reporting month, rolling 3-months, and FYTD with a click of your mouse
- Identifies both top performers and locations “at risk”
- Proven to cultivate a brand culture of competitive, profitable growth



Ranking and Benchmarking Analysis

Peer Benchmarking Results	Total Income		Total COGS		Gross Profit		Total Expense		Net Income	
	\$		\$	%	\$	%	\$	%	\$	%
Top 10%	275,531		38	-1.4%	163,987	352.1%	(1,381)	-2.1%	52,880	123.0%
Top 20%	218,942		2,461	1.7%	85,030	182.6%	4,853	5.5%	51,343	104.2%
Average	77,315		12,581	41.0%	64,734	59.0%	64,392	346.2%	1,342	-278.6%
Total Benchmark Entities - 136										

Ranked

Ranked
Not Ranked

Filter out 0 to remove unused rows, here ->	Total Income	Total Income Rank	Total COGS	COGS %	COGS % Rank	Gross Profit	Gross Margin %	Gross Margin % Rank	Total Expense	Expense %	Expense % Rank	Net Income	Net Inc %	Net Inc % Rank
KY - Florence - Scott McGarvey	525,064	1	163,816	31.2%	70	361,248	68.8%	114	295,439	56.3%	41	66,344	12.6%	58
TX - Austin North - Paul Casterlin	374,054	2	106,627	28.5%	67	267,427	71.5%	111	327,686	87.6%	65	(65,043)	-17.4%	84
TN - Chattanooga - Keith Sands	290,328	3	21,168	7.3%	26	269,160	92.7%	70	197,625	68.1%	48	71,535	24.6%	51
MN - Edina - Paul Kahler	276,434	4	90,225	32.6%	73	186,209	67.4%	117	177,229	64.1%	43	8,980	3.2%	68
WA - Seattle Bridge West - Taylor Collyer	267,742	5	22,607	8.4%	30	245,136	91.6%	74	214,622	80.2%	60	34,874	13.0%	57
MA - Woburn - Matt Pappas	262,649	6	74,997	28.6%	68	187,652	71.4%	112	118,995	45.3%	37	68,656	26.1%	50
VA - Salem - Denis Tebit	248,901	7	59,241	23.8%	59	189,660	76.2%	103	31,342	12.6%	19	158,528	63.7%	36
FL - West Palm Beach - Chris Mayer	244,454	8	61,018	25.0%	63	183,436	75.0%	107	267,378	109.4%	80	(91,898)	-37.6%	93
SC - Greenville - Byron Berry	240,754	9	59,309	24.6%	61	181,446	75.4%	105	302,690	125.7%	89	(121,244)	-50.4%	102
TX - Irving - Scott Callis	235,029	10	0	0.0%		235,029	100.0%	6	98,838	42.1%	35	136,191	57.9%	39
MA - Southborough-Framingham - Gauri Bhalakia	228,878	11	42,272	18.5%	50	186,606	81.5%	94	32,688	14.3%	22	153,918	67.2%	34
NV - Las Vegas Metro - Jimmy Platt	226,344	12	63,898	28.2%	65	162,445	71.8%	109	153,622	67.9%	47	(13,667)	-6.0%	75
AL - Birmingham Greystone - Terry Pouncey	219,980	13	54,339	24.7%	62	165,640	75.3%	106	159,901	72.7%	56	5,739	2.6%	69
AZ - Scottsdale North - Kevin Concannon	216,824	14	0	0.0%		216,824	100.0%	6	3,547	1.6%	15	213,277	98.4%	25
DC - Washington DC Spring Valley - Didi Barzacka	189,882	15	21,624	11.4%	36	168,258	88.6%	80	155,934	82.1%	61	12,324	6.5%	64
PA - Doylestown - Bob Kondraske	182,628	16	41,834	22.9%	55	140,794	77.1%	99	134,070	73.4%	57	11,166	6.1%	65
NE - Omaha - Scott Kaminski	176,875	17	18,166	10.3%	32	158,709	89.7%	76	202,036	114.2%	84	(43,201)	-24.4%	88
CA - Monterey Bay - Belle Smith	171,809	18	9,379	5.5%	23	162,431	94.5%	67	226,605	131.9%	93	(63,204)	-36.8%	91
AZ - Tucson Metro - Wendell Long	170,089	19	128,719	75.7%	90	41,370	24.3%	134	118,062	69.4%	53	(76,692)	-45.1%	96
WA - Marysville-Arlington - Brett Kinney	169,534	20	30,652	18.1%	49	138,882	81.9%	93	116,333	68.6%	51	22,549	13.3%	56



Recap

How Qvinci addresses common challenges and helps brands apply the Five Keys for improving compliance, performance, and expansive growth:

- **Near real-time collection** and consolidation of franchise data
- Enables the defining, establishing, and monitoring of **brand-defined standards**
- **Automates manual processes**
- Enables effective and clear communication of **financial insights everyone understands**
- Empowers franchise brands to create a **culture of transparency, collaboration, compliance, profits, and expansive growth**
- All with a **cost-effective and simple-to-use solution**

Next Steps

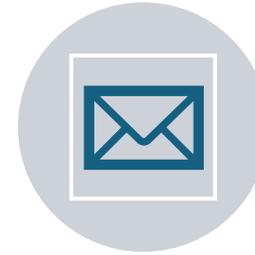
1. Schedule a [Private Demonstration](#) with one of our expert Solution Consultants
2. Attend one of our [Live Product-Focused Webinars](#) on Thursdays
3. Visit our [Learning Center](#)



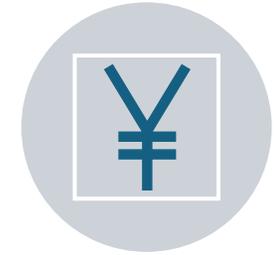
Qvinci Is Your Single-Source Provider of Simple, Cost-Effective Franchise FinTech Solutions



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Q&A Session

January 22, 2025

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