

5 Steps to Franchising

**Your Roadmap from
Local Business to National Brand**



FOCUS

***Food &
Beverage***

Turn Your Local Business into a National Brand

How to use this guide

This booklet explains the franchising process in a simple, practical way—especially for Food & Beverage concepts where consistency, training, and supply chain matter.

You'll learn:

- What each step typically includes
- Key decisions you'll need to make
- Common pitfalls to avoid

Note

This guide is informational and not legal, financial, or regulatory advice.

Why franchising (and why it's different)

Franchising can be a way to expand your footprint without owning and operating every new location yourself. Instead of building each new unit with your own capital and management bandwidth, you build a system that qualified franchisees can operate under your brand standards.

In Food & Beverage, the opportunity is real—but so is the complexity:

- Staffing and training affect the guest experience immediately
- Food costs and vendor reliability impact margins
- Execution consistency drives positive reviews, repeat visits, and brand trust

This is why franchising is best approached as a step-by-step build, not a quick expansion tactic.

Are you franchise-ready?

Many strong franchise brands share a few readiness indicators.

Concept Indicators

- Consistent demand and repeatable sales patterns
- A menu that can be executed consistently by trained teams
- Clear brand uniqueness

System Indicators

- Documented recipes, portioning, and service steps
- Training that works without the founder present
- Vendor specs and ordering routines that can scale

Business Indicators

- Unit economics you understand and can explain
- Realistic labor model and management coverage plan
- A clear picture of what makes a great operator in your system

The 5 Steps (Overview)

1



Legal

Build the foundation and compliance structure

2



Operations

Make the business teachable and repeatable

3



Marketing

Position the opportunity and attract the right candidates

4



Sales

Use a consistent process to award the right franchisees

5



Support

Help franchisees launch, perform, and stay consistent over time

Step 1

Legal

Build the Foundation

Franchising is regulated and document driven. The legal step defines the franchisor–franchisee relationship and sets expectations that protect both the brand and the franchisee.

What typically gets built:

- Franchise Disclosure Document (23 Items/Federally Mandated)
- Franchise Agreement (Governs the franchisee relationship)
- Brand protection basics (e.g., trademarks and usage rules)
- A compliance approach for how/where you offer and sell franchises

Food & Beverage Considerations

- Standards tied to food safety and guest experience
- Use and protection of proprietary recipes/processes
- Required equipment packages and approved vendor structure

Output

A legal foundation that supports responsible growth.

Step 2

Operations *Make It Replicable*

Operations is where franchising becomes real. Your goal is to turn what works in one (or a few) locations into a system that delivers the same experience across many.

What typically gets built:

- Operations manuals (real estate guidelines, accounting/insurance standards, open/close, prep, service, sanitation, cash handling)
- Recipe system (portioning, build guides, allergens, holding times)
- Training program (FOH, BOH, managers; initial + ongoing)
- Vendor/spec system (approved suppliers, specs, alternates, ordering cadence)
- Quality assurance (checklists, audits, KPIs)

Output

A system that can be taught, measured, and repeated.

Step 3

Marketing *Position the Opportunity*

Franchise marketing is not the same as customer marketing. You're communicating the opportunity to potential operators and filtering for fit.

What typically gets built:

- Ideal franchisee profile (who succeeds here—and who won't)
- Opportunity messaging and materials (overview, FAQs, unit story, pitch deck, website landing page)
- Legal disclaimers
- Lead channels (content, referrals, events, outreach, brokers as applicable)
- A qualification pipeline that screens early and consistently

Food & Beverage Considerations

- Clearly define the model: QSR, fast-casual, café, dessert, kiosk, truck, etc.
- Be specific about operator involvement and labor realities
- Set expectations on seasonality, peak periods, and local marketing effort

Output

A message + pipeline that attracts qualified candidates.

Step 4

Sales

Award the Right Partners

Awarding a franchise is a long-term partnership decision. A defined sales process protects the brand and improves franchisee outcomes.

What typically gets built:

- Sales stages (inquiry → qualification → disclosures → discover → award)
- Candidate scorecard (financial readiness, culture fit, capability)
- Discovery process (structured calls/meetings and decision milestones)
- Ethical guardrails (clear “no-go” criteria and consistent disclosures)

Food & Beverage Considerations

- Owner-operator vs. multi-unit suitability
- Staffing/management plan requirements
- Site expectations (visibility, access, delivery potential, trade area fit)

Output

A repeatable process to award franchises aligned with brand standards.

Step 5

Support *Launch and Scale Consistently*

Support is how you protect the guest experience across markets and help franchisees thrive.

What typically gets built:

- Pre-opening timeline and responsibilities
- Opening playbook (training, staffing, soft opening, first 30 days)
- Ongoing support cadence (check-ins, field support, reporting)
- Performance coaching + brand compliance approach
- Knowledge base and franchisee communication rhythms

Output

A support model that scales with unit growth.

THE CHALLENGE

In 2014, Jersey Shore locals Rob Giuliani and Abby Taylor launched a simple smoothie stand with a blender, a table, and a beach-town dream.

Inspired by their travels to Panama and Hawaii, they served superfruit bowls outside a pizza shop in Belmar, New Jersey. The community response was immediate — lines, buzz, and loyal fans.

As momentum grew and their first store opened in 2015, the founders realized they had something much bigger on their hands. But scaling a concept rooted in lifestyle, freshness, and surf culture meant more than opening more shops. They needed a way to preserve what made Playa Bowls special — while expanding it to dozens, then hundreds, of locations across the country.

What they needed was infrastructure, systems, and strategy — without losing the soul of the brand.



OUR ROLE

We served as Playa Bowls' behind-the-scenes builders — architecting the franchise foundation that powered their national breakout.

Franchise Development Group partnered with Rob, Abby, and their executive team to engineer a fully functional franchise system that aligned with the founders' vision.

Our work included:

- Drafting a strategic **Franchise Disclosure Document (FDD)** built for both brand protection and rapid growth.
- Creating a full operational playbook to standardize customer experience across all markets.
- Designing a franchise development system that attracted purpose-driven, lifestyle-aligned franchisees (including multi-unit operators).
- Advising on organizational structure and scalability as interest exploded.

With the right legal, operational, and marketing frameworks in place, Playa Bowls could scale without compromising quality or culture.

THE RESULTS

- Surpassed 200 open locations nationwide by 2024.
- Signed 195 franchise agreements in a single year, with over 50% from existing franchisees.
- Attracted private equity investment from Tamarix Equity Partners and Pacific General Holdings.
- Rolled out loyalty tech, enhanced systems, and accelerated expansion into new territories.

Playa Bowls started with a blender and a beach chair. Today, it's a leader in the health-focused QSR space — and it's only getting started.



Cousin Maine Lobsters

From One Food Truck to a National Seafood Sensation

THE CHALLENGE

Jim Tselikis and Sabin Lomac launched Cousins Maine Lobster in 2012 with a single food truck in Los Angeles and a big idea: bring authentic Maine lobster to the masses. The response was overwhelming — long lines, loyal customers, and soon, national fame after landing a deal with Barbara Corcoran on Shark Tank.

But explosive growth came with real challenges.

How do you maintain product integrity across multiple states? How do you train new owners to deliver not just lobster, but the brand story, experience, and hospitality that made it special? And how do you build a system that can scale — while preserving the soul of a family-run brand?

They needed a growth partner who understood more than franchising — they needed someone who could translate heart into systems.



OUR ROLE

We didn't hand them a playbook — we helped them write their own.

Franchise Development Group partnered with Cousins Maine Lobster to transform their early momentum into a scalable, sustainable franchise system. Our approach focused on codifying what made them great — and giving franchisees the tools to replicate it.

We worked closely with the founders to:

- Build a custom FDD that covered both mobile and storefront models
- Create a hands-on training program rooted in Maine, ensuring cultural buy-in and operational confidence
- Develop onboarding and support systems that guided franchisees through everything from truck setup to product sourcing
- Shape a franchise development strategy aimed at attracting passionate operators — not just investors

Our job wasn't just to formalize the business — it was to protect the soul of the brand as it scaled.

THE RESULTS

- Expanded to **85+ franchise units** across the U.S.
- Achieved estimated **\$60M+ in annual revenue**
- Maintained \$1.3M average sales per food truck
- Earned recognition with the **Franchise Innovation Award** for operational excellence
- Continued strong media presence (*Good Morning America, The Today Show, MasterChef*)

Today, Cousins Maine Lobster is more than a food brand — it's a national success story. And the systems behind it are just as strong as the story in front of it.



Roni's Mac Bar

From Local Favorite to Fast-Growing Comfort Food Franchise

THE CHALLENGE

What started as a quirky mac-and-cheese concept in Waco, Texas quickly went viral.

Founders Frank and Mary Senese launched Roni's Mac Bar with one goal: reimagine comfort food with customizable mac and cheese bowls. Thanks to a mix of great branding, bold flavors, and a massive TikTok following (800,000+ fans), demand exploded.

But viral buzz doesn't automatically translate to long-term growth. The Roni's team needed to capitalize on the momentum — before it cooled off. They wanted to franchise quickly, but they didn't have the backend systems or legal foundation in place to do it safely, confidently, or at scale.



Roni's Mac Bar

From Local Favorite to Fast-Growing Comfort Food Franchise

OUR ROLE

We didn't just launch a franchise — we bottled the buzz and made it sustainable.

Franchise Development Group worked closely with Roni's Mac Bar to turn their one-location success into a scalable national model.

We helped them go from viral to viable with:

- A custom-crafted Franchise Disclosure Document (FDD) that balanced speed-to-market with legal durability.
- An operations manual that turned TikTok magic into repeatable, scalable systems.
- A startup-to-scale training structure for onboarding new franchisees in multiple states.
- A go-to-market franchise marketing strategy targeting early adopters and food-first operators.

Everything we built was designed to preserve the energy of the brand while enabling serious, sustainable expansion.

THE RESULTS

- Launched 20+ locations across Texas, Iowa, Missouri, New Mexico, and Utah — with plans to reach 40+ franchise units
- Maintained strong unit-level economics and early franchisee satisfaction
- Generated ongoing local media coverage and customer buzz in each new market
- Created a scalable franchise framework that supports national rollout without sacrificing quality or brand voice

Roni's proved that comfort food can scale — and that with the right systems, a viral concept can become a lasting brand.



Puffy Cotton Candy

From a Sweet Side Hustle to a National Experience Brand

THE CHALLENGE

In late 2021, Brendon and Holland Curtis were on a winter stroll in downtown Franklin, Tennessee, when they noticed something strange: a long line at a cotton candy cart — in 30-degree weather. That moment sparked a question that wouldn't go away: What if we reimaged cotton candy as a full-blown experience brand?

By 2022, Puffy Cotton Candy was born.

Hand-spun in small batches and sculpted into whimsical creations, Puffy wasn't just another treat — it was a show, a feeling, a photo op, and a memory. From birthday parties and weddings to pop-ups and retail, the brand took off. But with success came pressure: how do you scale something this artistic without losing its magic?

Puffy needed a growth partner that understood how to take a product built on nostalgia and turn it into a franchise system without turning it into just another dessert shop.



Puffy Cotton Candy

From a Sweet Side Hustle to a National Experience Brand

OUR ROLE

We didn't just help launch a franchise — we helped capture lightning in a bottle and turn it into a business that could scale without losing its sparkle.

Franchise Development Group partnered directly with Brendon and Holland to build the infrastructure that would allow Puffy to grow fast — and grow right.

Our team:

- Crafted a Franchise Disclosure Document (FDD) that protected their IP, brand story, and business flexibility
- Translated Puffy's highly visual, artisanal process into a step-by-step operations manual that new owners could confidently execute
- Designed a franchise marketing and recruitment funnel that spoke to emotionally-driven, experience-first entrepreneurs — not just investors
- Advised on pricing, expansion cadence, and launch strategy to preserve excitement with each new market while keeping operations lean

This wasn't just about spinning sugar. It was about scaling delight.

THE RESULTS

- Puffy launched its first franchise location in Freehold, NJ in early 2025
- Signed 17 additional franchise agreements, with stores opening in Orlando, Las Vegas, Tampa, Dallas, Jacksonville, and more
- Generated ongoing social media buzz and local press coverage in nearly every new market
- Created a scalable franchise system that balances handcrafted charm with operational efficiency

Puffy Cotton Candy is living proof that a simple idea — executed with heart and strategy — can become a brand that brings joy across the country.



Ready to Turn Your Restaurant Into a Franchise Success Story?

Whether you're running a buzz-worthy concept, a beloved local restaurant, or a proven brand ready to grow beyond one market, Franchise Development Group helps restaurant owners scale the right way.

We've partnered with founders across the food and beverage space — from fast casual and QSR to coffee, dessert, and chef-driven concepts — to build franchise systems that protect the heart of the brand while fueling sustainable growth.

At Franchise Development Group, we don't just create FDDs or hand over templates. We help restaurants build the operational playbooks, unit economics, and growth strategy needed to turn great concepts into franchise brands with long-term staying power.

You've seen what's possible. Now it's your turn.

Book a free strategy call and let's talk about what it would take to franchise your restaurant the right way — with confidence, clarity, and real momentum.

Book Your Free Strategy Call



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