

ANNUAL UNIT TRACKING CHART FOR YEAR _____

Many small Franchisors struggle with keeping up with the paperwork necessary to track what is happening in the franchise system as they grow. Keeping accurate records is essential to updating the Franchise Disclosure Document. There are many automated systems and resources that a franchisor can use to track unit growth, but franchisors that have not yet budgeted for those resources might consider using a simple chart like the one below.

Instructions: Start a new Chart at the beginning of each fiscal year and record only one year on each chart. Use one line for each action, checking only one of the red boxes. So for example, if Kalamazoo is terminated but you resell this territory in the same year, there would be two line entries, rather than a check in both the Opened and Terminated boxes. Place a “C” or an “F” in the blue box designating the unit as a company affiliate (under the same control as the Franchisor) or an unaffiliated Franchise.

UNIT DESIGNATION	STATE	COMPANY AFFILIATE OR FRANCHISE (place a C or F in the box)	UNIT OPENED	UNIT TERMINATED	UNIT NOT RENEWED	UNIT REACQUIRED BY FRANCHISOR	UNIT TRANSFERED TO NEW OWNER	DATE OF ACTION