School is Easy

TUTORING

# Franchise Operations Manual

2023

As per the terms the Franchise Agreement and in part:

You acknowledge that we or our affiliates own the copyright in the School is Easy Operations Manual and that your copy of the Manual remains the property of School is Easy Inc. / School is Easy USA, LLC

- √ You agree to treat the Manual, training materials, and any other manuals or materials created or approved by us for use with the System as secret and confidential.

- √ You agree not to copy, duplicate, record or otherwise reproduce the Manual or other materials provided by us, in whole or in part.

- √ In addition, you agree not to make any confidential information or materials supplied by us available to any unauthorized person.

- √ You may not communicate, divulge or use for any purpose other than the operation of the Franchised Business any confidential information, knowledge, trade secrets or know-how which may be communicated to you or which you may learn by virtue of your relationship with us.

- √ Further, you must require your employees, and any other person or entity to which you wish to disclose any confidential information, to execute agreements, in the form provided in Appendix C to the Franchise Agreement, that they will maintain the confidentiality of the disclosed information.

Also note, this Manual references School is Easy and School is Tutoring which is inclusive of both School is Easy Inc. AND School is Easy USA, LLC

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## How To Use This Manual

Personal Reference Guide - This manual can be useful to refresh your memory on any point of operations of your School is Easy Franchise.

Office Administration Training Guide - Just as you were trained with this manual, so can you train your employees by giving them reading assignments in this manual.

This manual has been provided for all our members to use as a reference to the School is Easy Tutoring standards of operations, policies and procedures.

Throughout the manual are links to additional information and resources. The links will take you to our online School is Easy Support Centre.

Should you have additional questions or queries, please submit a support ticket via the online Support Centre site and a member of the team will respond within 24hrs, if not sooner.

# Part 1: Introduction

## Welcome

Congratulations on becoming a member of the School is Easy Tutoring franchise community. It is our sincere hope that you establish in your community a name and operation as inspiring and successful as the very first School is Easy, started British Columbia, Canada.

Since 2002, School is Easy Tutoring has been helping to support families and advance the learning of students by providing human connection and undivided attention. Below is just a sample of the many testimonials we have received from our parents:

> 'I called your company to find someone to teach daughter math, but we got so much more than that. I watched her grow in confidence and ability that would not have been possible without your tutoring service. Phil was a fantastic tutor. Her never once implied that she was doing something incorrectly but encouraged her to look at it from a different angle. Our experience with School is Easy Tutoring and Phil over the last 2 years has surpassed our expectations.'

> 'School is Easy has save us hours of time and provided expertise by finding the right tutor to meet our needs within one evening. School is Easy conducted the search and reference check for us. The tutor has been marvelous – keepings us posted through regular progress reports and checking with the school teacher on curriculum. Our son has finally mastered some of the math basics that he had been struggling with all year. The tutor has been creative and resourceful – finding a math "rap" song that really inspired our son to learn his multiplication tables.' – S. Walters, Burnaby

> 'We tried other services and School is Easy surpassed them all. Both our daughters have benefited. The turnaround time from asking for a tutor to getting on that works well with personalities and learning levels of the girls was "SUPERB". They were referred to us by a friend and in turn we tell others. I put my name to this comment to show appreciation to the great service they have provided us over the years.' – R. Mitchell, Langley

At School is Easy Tutoring we have traced our steps, reviewed the details and refined our processes. The foundation has been set; our method of assessing needs, recommending solutions and matching students with a tutor is simple and effective, such that both child/student and parents will recognize and appreciate the care and thoughtful service School is Easy has become known for.

Our franchisee training program will guide you through the process of learning our methods and phases of business, giving you the necessary skills for success with your franchise. The degree of your success, however, will depend upon your willingness to learn and communicate with us, as well as your customers, coupled with the amount of time and effort you are willing to devote to learning and executing each phase of the business process.

We hope you are as excited about your decision to become a franchisee with us as we are excited to have you in the School is Easy franchise community, and we look forward to assisting you with your goals and seeing the success of your business.

Sincerely, Your School is Easy Support Team

# Part II: Our Brand

## Vison

Empowering students with confidence and skills to succeed in their personal and career goals.

## Mission

School is Easy Tutoring is a full service, relationship based tutoring service providing personalized, one-to-one support to families struggling to engage and advance in today's education climate.

## Unique Selling / Value Proposition (USP)

In any business, competition is fierce. What is it then that sets the winners apart from the mediocre?

Answer: Successful businesses have identified and defined what it is that is "better" than what their competitors offer. Successful business know how to promote and highlight what it is that is unique about their offering or how what they offer provides value to their audience while those mediocre businesses, do not.

At School is Easy Tutoring, it is the following that we have identified as our Unique Selling or Value Proposition, our USP and it's imperative you learn, understand, incorporate and adopt them into every conversation you have about what it is you do.

1. **At School is Easy, we personalize learning**

   *At School is Easy* we provide in home, one-to-one tutoring. We do not own our own curriculum, rather we personalize our learning, not based on a small group, but based on that individual learner. Everything we do is customized specifically for the needs of that student.

2. **At School is Easy, we are here to meet our students' needs & goals**

   The ultimate goal of our students might be to get into university or get into nursing or to earn a scholarship. At School is Easy Tutoring, our Learning Consultation process informs what it is we need to know about the student's challenges, how to get them to where they need to be and how to work with them to get them there.

   For example, it might be organizational skills. Kids are not taught organizational skills, how to organize themselves in order to get things done on time - they might be a smart enough student, if only they could organize themselves. But they don't

know how and that's what we'll work with them on while supporting them in the subject they are behind in.

**3. At School is Easy, we work together to make a difference**

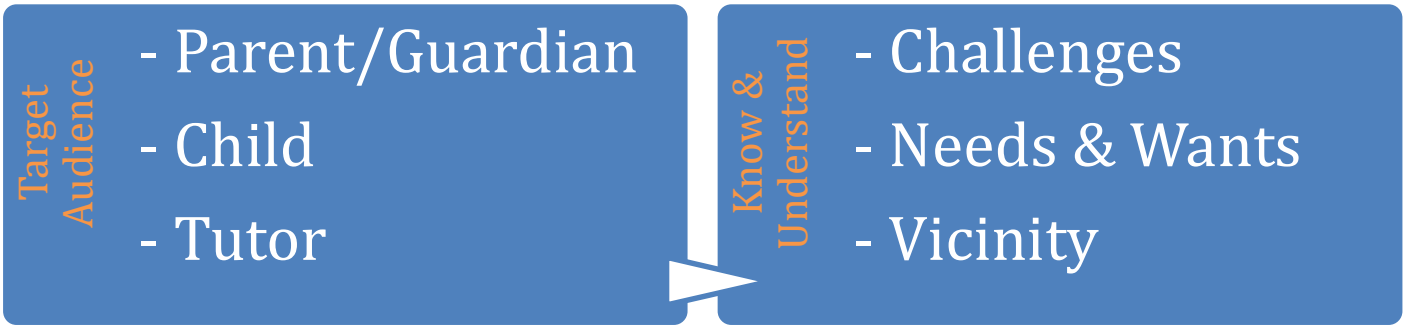
*At School is Easy* we are not the solution – we are PART of the solution. We work together to make a difference. Communication flows between the Parent, Teachers, the Student and School is Easy to ensure we have the right plan in place. We monitor progress and modify the plan as necessary.

**4. At School is Easy, we embrace diversity**

Whether it's background diversity, home situation, learning styles, etc. – all children are different: they behave differently, learn differently, cope differently etc.

At School is Easy, our doors are open to the all children who may be struggling at school.

## Our Target Audience




The School is Easy target audience is an important part of the School is Easy Tutoring brand

Why ?– because how you present or position the School is Easy brand to each audience may be slightly different base on that audience's needs and wants.

For example: When speaking to a parent– Which USP points would you highlight?

Now, how would that change if you are speaking to a prospective tutor?

It's important you know what each group CARES about – what they VALUE.

For more detailed information about our target audience, click on the link below:

Clarity=Success

## Our Key Brand Elements

School is Easy, just like any great brand, is represented by all of the elements that communicate what the brand is, what it stands for, and what it represents.

Honouring and adhering to these standards will deliver a consistent and recognizable message and experience across all franchise locations.

Key elements for the School is Easy brand include but are not limited to the following:

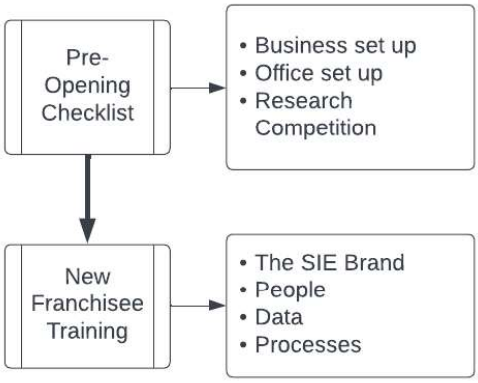
- Using the trademarked logo, without alterations: the approved colors, tag lines and graphics
- Owners driving wrapped or SIE decaled cars, owners, tutors and staff dressed in branded apparel and or caring branded totes
- Staff who are fully trained to communicate with customers (students AND parents) in a knowledgeable, helpful and caring manner
- Advertising (in all media) that is truthful and accurate and uses approved advertising assets—images, logos, taglines, fonts, etc.
- Messaging that is legally correct

Each of the above are ways in which we reach the customer and every one of them should result in a great impression of School is Easy. Each of these elements will attract interest, create a unique experience, and fulfill our main goal: student success at school and satisfied parents.

Refer to School is Easy Brand-Guide for more information and updates

# Part III: Ready your Business

Following the signing of your Franchise Agreement your next step will be to register for School is Easy Training.



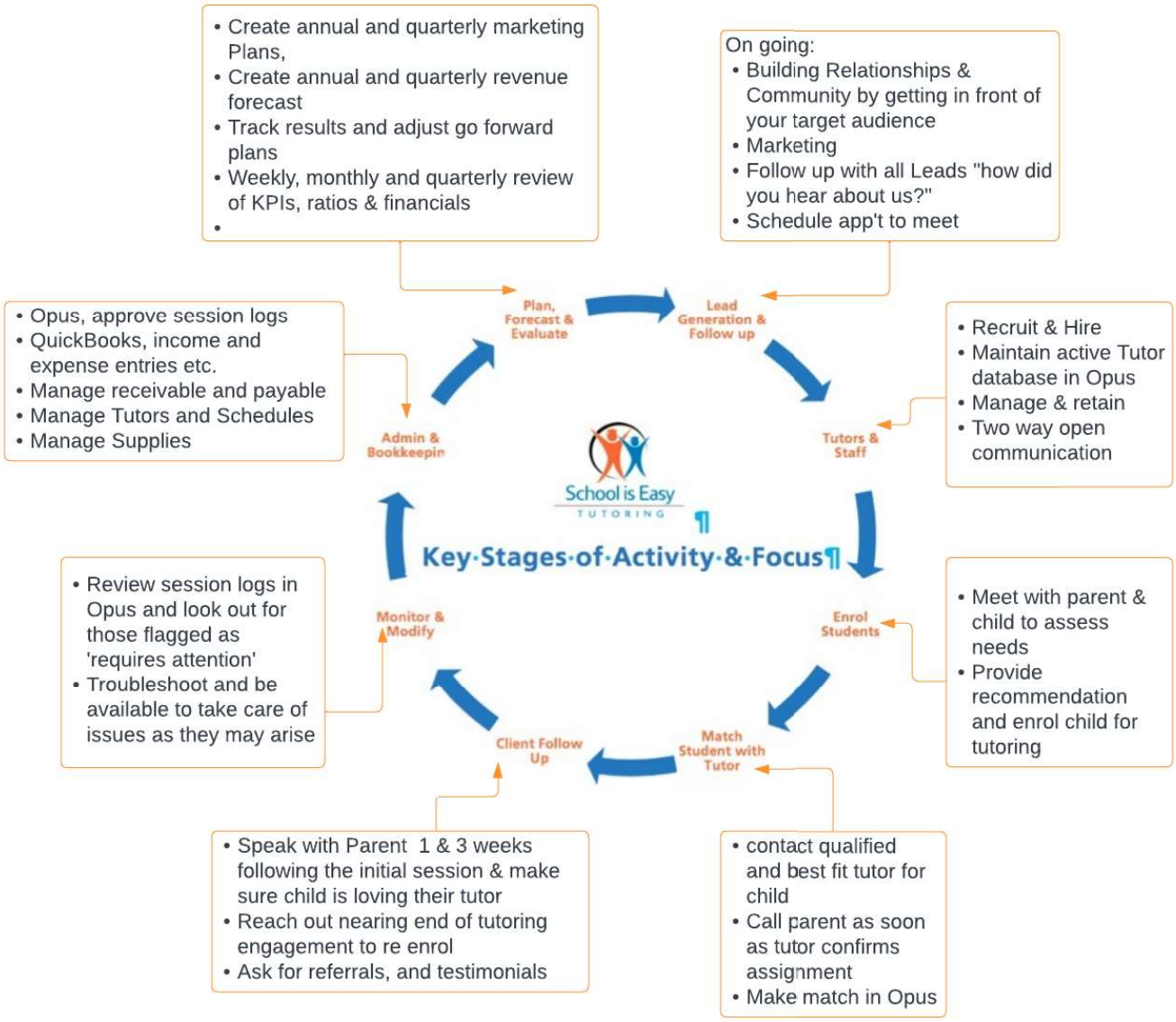

Next, a prework package will be emailed to you including your pre-opening checklist.

This checklist has been prepared to assist you in identifying tasks required in setting up your business.

It's important that a good majority of these tasks be completed by end of training so that you can hit the ground running and begin enrolling students soon thereafter.

## Key Stages of Activity and Focus of Your School is Easy Business

Below is an outline of your main School is Easy areas of focus. During your initial new franchisee training we will be addressing the key activities at each stage.




## Technology, Systems and Email

### Opus

Opus is a School is Easy proprietary web based, end to end, business management system. Opus will help you to manage your business activity from client leads, student enrolment, tutoring schedules, payments and reporting, to name a few.

There are numerous 'How to' guides posted on our on-line Support Centre to assist you along the way.

## Stripe

This module interfaces with Opus to facilitate a seamless receivables & payable process for client payment and tutor payment, thus reducing the time & costs associated with manual processing and follow up.

As part of onboarding we will set up integration on your behalf – we will give you access to so you can login and review transactions

For each transaction processed through Stripe a transaction fee will apply. That means, for each transaction, you will receive the total transaction amount less the fee.

At time of writing the transaction fee is three percent of transaction total.

## School is Easy Homework *App.

Find a tutor instantly through your smartphone or table with our School is Easy® app.

- An **on-demand** tutoring app to get help anytime, anywhere.
- The App is ideal for help with homework, test preparation, last minute questions and to supplement the sessions with your regular tutor.
- It is very easy to use. Just request a tutor for the subject you need with a quick tap and **get connected in less than 60 seconds**.
- It is very affordable. Just Pay by the minute* and you use only as much time as you need!

*Note: To offer the School is Easy Homework App., you must be using the Stripe payment system.

## Email

All School is Easy Franchisees will receive two (2) School is Easy email addresses. Email addresses usually consist of the Franchisee's territory name followed by "@schooliseasy.com. For example "vancouver@schooliseasy.com" and the other is a personal School is Easy account. <firstname.lastname@schooliseasy.com>

### Additional Email Accounts

You may request additional email accounts to be set up for staff.

For more information, submit a support ticket via the online Support Centre and a member from our IT department will reach out within 24hrs.

### Storing Emails

The following is recommended:

All emails should be retained, either in archives or folders, for the ultimate availability and as a potential legal document related to School is Easy Tutoring. Emails may also serve as a reference when needing supporting documents during customer disputes.

## Technology

For you and your tutors to operate efficiently we suggest the following equipment specs:

When purchasing laptops, please refer to the system requirements section below. Using this knowledge you will be able to reduce the risk of ordering incompatible systems. If you have any questions on the systems you are purchasing please submit a support ticket via the School is Easy Support Centre and How to submit a support request

The following are School is Easy minimum system requirements and are subject to change at any time:

**CPU:** Intel core I5 (5 is more recent than the I3's and for longevity we recommend an I5) – Quad Core 3.20 GHZ

**Operating System:** Windows 10 Professional Memory: 4GB

**Hard Drive:** 120 GB SSD

**Office:** Microsoft 365 A1 licenses (Access To email, Word, Excel)

**Printer**: Epson WorkForce Pro WF-4830DTWF A4 Color Multifunction Inkjet Printer

**Browser**: Updated version of Edge, Chrome, Firefox

### Usage of Software

During the operation of School is Easy, franchisees are required to utilize the following software for the expressed tasks. Any deviations must be explicitly approved in writing by School is Easy Support Office.

**SIE Website:** (no software or scripts may be added without authorization from Support Office)

**School is Easy on-line Support Centre:** Used by franchisees to search and download SIE business related support documents as well as submission of support tickets for help with specific queries.

**QuickBooks:** the most up to date, online, "plus" version of QuickBooks is recommended for bookkeeping. At time of writing and as a small business owner, you will receive a 30% subscription discount off the list price.

**Zoom or Teams** are the preferred platforms for on-line tutoring.

At this time, Franchisees are permitted to choose their own software for use in the following tasks:

Centralized Lead Database (we suggest HubSpot or Mail Chimp)

Email Marketing (we suggest HubSpot or Mail Chimp)

Office Document Production (MS Office is recommended)

# Part IV: How We Do What We Do

## The School is Easy Process

At School is Easy, we follow the "5M" process to help our students' journey be a successful one.

1. **Meet*:*** At School is Easy, we meet with parent (& child) and conduct a Learning Consultation (LC) and assessment.

2. **Make a plan**: During LC we evaluate the child's needs and goals. Based on your findings, you make a plan to help child reach defined the goals.

3. **Match**: At School is Easy, we match the child with a tutor who is the best suited for his/her academic needs, personality and learning style.

4. **Monitor**: Session Logs are emailed to the parent after every session. Session Logs allow you and the parent to monitor the child's progress at every stage.

5. **Modify**: As you get to know the child, or as things change, you may suggest modifications to the plan to better address the child's needs and goals.

During training, this process is addressed in more detail and supplemental resources are available here: What we do & How we do it

### Session Logs/ Reports

The session log is your best opportunity to create ongoing meaningful communication with your customers. Session logs are completed in Opus by School is Easy tutors following each tutoring session. The following is what you will expect your tutors to address with each session log written:

1. Specific information about what was worked on during the session.

2. Comment on if student is on or off path towards their goals. If off path, tutor should report on how they are addressing this with the student.

3. Outline strategies or actions parents may need to take to support their child.

4. Session Rating: Tutors will rate the student based on their level of Engagement, Preparation and Progress for that session.

And perhaps most importantly, your tutors will be expected to report on any deviation from expected progress. These sessions may be flagged by tutors for administrative attention. As part of our 5M process, it's important you monitor each log and view those which are flagged; modification to the child's learning plan may be in order.

For more information and support documentation, click on link below:

Writing a Session log

## School is Easy Tutoring Process

Commitment, Collaboration, Communication, Consistency, together they create a successful School is Easy tutoring relationship – also known as the 4Cs.

1. **Commitment** – from both sides, parent/child commit to the process, to the schedule and to doing the work (child) – SIE commits to doing what we say we're going do and show up when we say we're going to show up.

2. **Collaboration -Parents** know their child best, their personality, their likes and dislikes, behaviours, etc. and the **Child** can tell us from his/her perspective what's happening at school and **Teachers** can provide insight into current progress child is making at school. Armed with these insights SIE has a more complete picture and understanding of the situation and can design a more well rounded plan and approach to helping your child with the struggles he/she is having at school.

3. **Communication** - On-going communication between all stakeholders to ensure we are making progress on the tutoring plan (monitor and modify as outlined in SIE process)

4. **Consistency -** Consistency of schedule. A session here and a session there is not going to solve anything. SIE is not a "homework" machine. (consistent practice makes perfect)

## The Learning Consultation

At School is Easy we conduct a comprehensive Learning Consultation to best understand and adapt to all learning styles, personalities and learning challenges.

Purpose and goal of the Learning Consultation:

1. **Provide Assurance to Parent / Guardian**: "You have come to the right place!" "We're here to help!"

2. **Introduction to School is Easy**: What we do and how we do it

    *why?* In case they are shopping around

*Tools & discussion points:* SIE system / process: 5M's and 4C's

3. **Getting to know you**: Parent & Child

   *why?* Because, at School is Easy we personalize the learning and want to fully understand the current situation and the desired outcomes of the child and parents.

   *Tools & discussion point*s: USP talking points, Learning Style assessment / Student Profile form

4. **Ensure Parent is educated & informed**

   *why?* So they have an understanding of what it takes to achieve results / how child will benefit

   *Tools & discussion points:* SIE tutoring process: 4C's, SIE Unique Value / Selling Proposition / Learning Loss diagram & Academic Foundation form

5. **Summarize conversation**

   *why?* Gain agreement on what the challenges, pain points and goals are

6. **Provide Recommendation**

   *why?* Because you are the expert and that's why they called you.

   *Tools & discussion points:* Linking back to the tutoring C's

It is imperative to your success that you know, understand and can confidently speak to all aforementioned points.

It will be the care and conversations you have about How We Do What We Do, that will foster relationships and set you apart from other tutoring services in your territory.

For more information and support documentation, click on link below:

The Learning Consultation

## Customer Service

Growing your business is about relationships; understanding your clients' motivations, objectives, wishes and desires, and then exceeding your customer's expectations with outstanding customer service.

To do this, deliver an exceptional first experience and then look for meaningful opportunities to connect with your existing customers and build upon the relationship. Be aware of challenges the student is facing as they arise and respond to these challenges quickly and with care. After all, in the eyes of your client parents and the students', school-is-easy.

### Pricing Strategy

At School is Easy, we are committed to helping students be successful at school. As such we offer and sell our lessons in packages, multiple lessons at a time for a set price. A purchase of just one lesson is not going to provide results. That being said however, if it is the goal of our engagement with the parent & child is to help him/her prepare for a test, or the like, we will offer a one lesson at a time option. This option has each individual lesson priced at a higher rate than the average lesson rate of a package.

Before setting your prices, be sure to research what competitors are charging, the market rate for tutor pay, and know your overhead costs.

It's important to keep in mind that your profitability depends on your margins, the difference between what you charge clients and what you pay your tutors + your overhead costs.

### Satisfaction Guarantee & Refund Policy

At School is Easy, if your customer is not satisfied after one specific lesson, for whatever reason; providing a one time, one lesson refund is a good-will option we highly support. However, this policy would not apply to those customers who, after numerous tutoring sessions, state dissatisfaction with the tutoring engagement to date.

# Part V: Our Tutors

### Introduction

At School is Easy, our tutors work one-to-one with each student. Our tutors are motivated and qualified to support learning in a fun and memorable way for our students.

The School is Easy tutor team is generally made up of a group of individuals from different backgrounds, diverse skill sets and experiences. Some may be high school graduates, skilled at leading, coaching and engaging primary school children or some may be subject matter experts working with students on complex math, while others may be certified teachers with years of classroom experience.

Whichever the tutor's experience or background, the goal will always be; match the child with the qualified tutor who is the best fit in helping them achieve the desired outcome.

Here is why tutors love working with School is Easy.

At School is Easy,

1. We have a**n easy** and **quick** matching process. Tutors do not have to find their own clients.

2. We offer a **flexible** schedule. Tutors can choose assignments that fit their schedule.

3. We are **convenient**. Tutors can choose assignments close to their home.

4. Our tutors are not "locked-in" to a specific contract commitment. Upon hire, we do request tutors commit to a minimum of one semester and other that that, Tutors can stop tutoring with School is Easy without penalty.

5. We have **a high standard** of tutoring requirements.

6. We offer a **safe** environment. Tutors only go into a home when other family members are at home. If not, the tutoring will take place in a public place.

7. At School is Easy, our tutors are a **part of our team.** Franchise directors/owners actively and regularly communicate with their tutors to resolve issues and discuss student progress.

8. Our tutors can make **extra money** when registered as a tutor on our School is Easy Homework App.

## Criminal Record Checks:

All tutors **must** have a criminal record check. The criminal record check must cover the past 5 years and must be updated every 2 years. If the tutor has been living in the country for less than 5 years, a criminal record check should be obtained from their last country of residence.

> **Note:** Check employee laws of your Country including work permits and or residency requirements – for example, in Canada, all non-citizen tutors must have a valid working visa for Canada and a Social Insurance number. In the USA, All US non-citizen tutors must have a valid working visa for the USA and a Social Security number.

## Tutor Pay Rates

Both your tutoring fees and tutor pay largely depend on local markets. You'll need to do some local market analysis. Don't worry about what independent tutors are charging as they are not only tutoring but are also managing the scheduling, prospecting, paperwork, dealing directly with clients who may be dissatisfied, etc. At School is Easy, our tutors are not responsible for any of those tasks. Instead, look at what similar in-home tutoring businesses are charging and paying, Tutor Doctor and ClubZ! are likely your closest competitors with similar business models.

It's important to keep in mind that your profitability depends on your margins, the difference between what you charge clients and what you pay your tutors.

Click on link below for additional information and support documents.

Our Tutors

# Part VI: Lead Generation & Marketing

## Introduction

As a School is Easy Tutoring business owner, you are in the Relationship Business.

Being out in your community, being known in your community, and building relationships within your community is what will bring your School is Easy business to life. YOU are the face of your business and people do business with people they like – so get up from behind that desk and go out and meet people!!

Remember, word travels fast and favorable relationships with others will help generate leads for your business.

So, what is marketing?

> *Marketing is the process of getting people interested in your company's product or service. This happens through market research, analysis, and understanding your ideal customer's interests. Marketing pertains to all aspects of a business journey including service offerings, service delivery, sales and advertising.
>
> *https://blog.hubspot.com/marketing/what-is-marketing

Where does marketing fit with 'being in the relationship business'?

> **Relationship marketing is a strategy that focuses on forging long-term partnerships with customers. Companies build relationships with customers by offering value and providing customer satisfaction. Once relationships are built with customers, customers tend to continue to purchase from the same company, even if the prices of the competitors are less or if the competition offers sales promotions or incentives. Customers (both organizations and consumers) tend to buy products from suppliers whom they trust and feel a kinship with, regardless of offerings of unknown competitors. Companies benefit from repeat sales and referrals that lead to increases in sales, market share, and profits. Costs fall because it is less expensive to serve existing customers than to attract new ones. Focusing on customer retention can be a winning tactic; studies show that increasing customer retention rates by 5 percent increases profits by anywhere from 25 to 95 percent.
>
> **https://opentextbc.ca/businessopenstax/chapter/the-marketing-concept/

## Marketing Streams / Channels

Generate leads via a variety of channels. Marketing using only one channel will not produce optimum results. Remember, you are in the relationship business so investing all resources into only online or only print advertising for example, will not get you out in front of people.

Click on the link below for the seven (7) marketing streams and tactics you will want to consider when developing your marketing plan for lead generation.

Marketing Streams / Channels and Tactics

## Lead Generation

Leads are generated via marketing and marketing events and efforts…. such as getting in front of people and building relationships.

The goal of lead generation is to collect contact information from those in your target audience. Those who may want your service now or in the future or know someone who may want or need your service now or in the future. This contact information forms your data base from which you actively follow up and keep in touch with via one on one contact, email, events, campaigns etc.

Contact information and following up with leads is extremely important because step #2 is scheduling an appointment to meet. The appointment is followed by the meeting to provide a Learning Consultation and Recommendation. The recommendation is based on your conversation and is customized to help and assist the parents and the child currently struggling with school work.

The overall objective then, is to turn leads into enrolments!

Remember, you will be investing time and money into marketing your School is Easy Tutoring business, essentially generating leads via marketing and building relationships.

You never want a lead to slip through the cracks!

Leads cost money!

Leads are GOLD!

Always Follow up and track your conversion ratios!

## Lead Follow up and Conversion Ratios

With leads now in hand, the growth of your business will come down to converting these leads first into an appointment, then an interview, converting to an enrolment and from there, into new long-term relationships and customers which would then convert into additional enrolment contracts, referrals and a health reputation of being known in your community as the place to go for tutoring and working as a tutor.

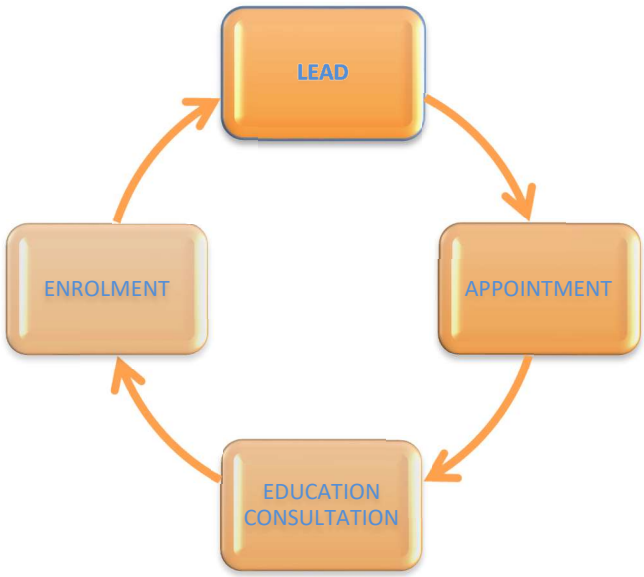
We call this the, Lead Generation Cycle.

### Lead Generation Cycle

**Key Performance Indicators**

Lead Generation Ratios:

- Lead : Appointment
- Appointment : Interview
- Interview : Enrolment
- Enrolment : referral (lead)
- Enrolment : reenrolment (lead)
- Leads : Enrolment




Conversion Ratios are a key performance indicator (KPI) of your business. They will help identify areas where more focus, practice and skill may be required to move each lead through the cycle and ultimate enrolment.

For example, let's say your goal is to enroll 30 students within your first three months of business. The number of leads you need to generate will all depend on your ratios:

Below is an example, assuming your conversion ratios are as highlighted in yellow.

| KPI'S - your RATIOS | |
|---|---|
| What is your conversion rate from Lead to Appointment? | 60% |
| Conversion from Appointments to Interview? | 55.0% |
| What is your conversion rate from Interview to Enrolment? | 30% |
| *Note: "interview" is same thing as an Education Consultation* | |
| | |
| **Total number of Leads required to reach your goal** | **303** |
| Number of Appointments required | **182** |
| Number of Interviews required | **100** |
| Number of **Enrolments** I need | 30 |

Notice the number or Leads you need to generate (303) in order to enroll 30 students.

Therefore, to increase your number of enrolments, you have two avenues:

1. Generate more leads or
2. Improve your ratios.

And here's how:

1. Be diligent and disciplined in your lead generation efforts. Always be networking, building relationships, and letting everyone know what you do, why you do it and what it would mean to them and their family.

2. Practice! Practice! Practice! Learn all aspects of the School is Easy process inside and out – our 5Ms, 4Cs, USP, our learning assessments and what they mean. Become proficient at recommending a solution that is customized and specific to the student & family with whom you are looking to assist.

At School is Easy, you are in the relationship and lead generation business.

## Inquiry (lead) Follow Up

Studies show that you have 60 seconds to engage with your lead

longer than that and you run the risk of losing them.

For example: When a lead/prospect calls, they are very likely looking for an immediate solution to a pressing problem. Remember - you are not the only provider in town. The longer you wait to solve the parent's problem, the greater the chance that you will lose that customer to a competitor.

- If the phone rings, answer it! – even if you're "off duty" – it could be a parent in need.

- If an inquiry is submitted on the website, reply within an hour or less – even if you're "off duty" – it could be a parent in need.
- If a parent emails your office directly: reply within an hour or less – even if you are "off duty"- it could be a parent in need.

**REMEMBER to Always Ask: "How did you hear about us / School is Easy?"**

Record the answer to this question, it will help inform future marketing initiatives.

## Lead Management & Opus

Opus will create reports about student registrations and will give you valuable information about which subjects, locations etc. are the most popular.

Click on reports in OPUS and research. This information will help you make marketing decisions and hire tutors.

In order to learn valuable information about your business it is important to track all inquiries (inquiry = lead).

Remember, always ask: How did you hear about us? Tracking the answer to this question will help inform your marketing.

With each inquiry / lead write in as much information as possible. In the comments section make a note of whether or not they enrolled. This will help determine your conversion ratios.

## Annual & Quarterly Marketing Plans

Marketing isn't a just-in-time activity. As a business owner, set aside time to complete your plan & evaluate results. When creating your plan, consider: what is the competition doing? What time of year is it and what is happening in the education arena in your area (seasonality); exams, parent teacher nights, term change, holidays, school breaks etc. What is my mix of 'passive' advertising versus 'active' marketing? Which marketing categories will best highlight your services and generate leads, etc.?

Ask yourself: *Who is my target audience and to whom is this particular marketing initiative directed?* Identifying this first and through planning, will set the tone for the message you'd like to communicate.
For example, rather than marketing for students, think of working to attract and retain the families you want to serve.
Why? Because families are made up of parents, grandparents, aunts, uncles, and often multiple children. What marketing will you do to peak their interest and move them to action? That ideal action being, to reach out to you for more information.

No matter what marketing you do, it's essential that you always track the success of your marketing efforts. Collecting data and measuring results will help you determine which marketing efforts, campaigns, channels, etc, were effective and which were not. With a completed marketing plan at your fingertips, you will be able to effectively reflect on the why

or why not, success of each initiative based on what, where, when and how of each initiative – thus informing your Marketing Plan and Marketing Spend going forward.

Click on link below for additional information and support documents.

Plan, Forecast, and Evaluate

## Marketing Ideas

### 1.Generating Leads in your Community

Be creative in how you can get the word out. We call it the hustle because it largely depends on your entrepreneurial spirit. It depends on you knowing yourself, knowing your community, getting creative, and most importantly, getting out there!

Listed below are a few ideas to get you started:

1. Leverage the relationships you have.
    - Networking - Get by Giving
    - Donate to charities
    - Speak at meetings
    - Sponsor youth sports.
    - Connect with the coaches of these teams and help them see how School is Easy can support their athletes through academic support and mentoring
    - AND attend the games & events. Get to know the parents and families.

**2. Strategic Alliances**

- Contact organizations by sending an introduction letter and follow up with a phone call.

**3. Hair salons, nail salons, orthodontists, dance studios, hockey rinks etc.**

- These are places where mothers go.

For additional information, click on links below:

Generating Leads in Your Community

School is Easy Tutoring, Brand Guide

### 2.Car Signage

- **Full Car Wrap -** When you compare cost of impressions, car signage is one of the best values. A full car wrap can be a powerful attention getter and remember, it goes where you go. You'll have your own personal and roaming bill board.

- **Perforated Rear Window Ads -** Most people see your car from behind, rear window signage can make a great impact at a fraction of the cost of a full wrap. Based on your qualified car and for local installation, we will send you the design file to have a car sign printed.

- **Car Magnets -** Car magnets can also help promote School is Easy, particularly in the neighborhoods where your students live.

- **Tutor owned cars -** A good strategy is to approach active tutors to see if they are willing to put the rear window sign and car magnet on their qualified car for $50/month (sample amount).

**3.Website**

School is Easy Tutoring maintains a national as well as local franchise websites. Inquiries via the website's lead generation form will be forwarded, to each respective franchise location.

**4.Facebook and Instagram**

School is Easy maintains both national and local franchise Facebook pages. Posts to the national site are automatically posted to each franchises Facebook page. Franchises can also post to their Facebook page. School is Easy also maintains a national Instagram account.

See the School is Easy article below for more information on social media standards and guidelines.

Online and Social Media

## Testimonials & Reviews

Online reviews and testimonials are very important. Many people prioritize online reviews as high or higher than direct referrals. You don't have to have hundreds for reviews to be effective. On the other hand, no reviews look awfully stark. Here is how you can cultivate and grow your reviews and testimonials.

**Great Customer Service**

No getting around it. You only get great reviews if you provide a great customer experience. The first step is to make sure that you are on top of your business. Pay attention to the session logs. Pay special attention to the session logs flagged as requiring attention. These sessions are gold as it will allow you to gain insight into what's not going well and help to correct the problem. Work with parents as a trusted family advisor and earn their respect. Relationship.

**Confirm Happiness**

Have you cultivated a RAVING FAN!? Is your customer really happy about the services they are receiving? Ask, don't assume. Note: Discovering a challenge a student is having from a session log & conversation with the tutor, and then following up with a parent is a great first step, but it's incomplete. Before you ask the parent for a review, wait till you get results.

**Ask**

Once you have confirmed the customer's happiness, then ask them if they would share their experience by writing or posting a review / testimonial.

For more information click on the link below

How to Obtain Testimonials

# Part VII: Finance & Administration

## Introduction

As a business owner you are jack-of-all-trades. It is important to be realistic about your strengths, weaknesses, likes, dislikes and knowing what to get help with, or assign to another person. You may think you can do it all but inevitably something will go left unattended to.

As a School is Easy business owner YOU need to know your business better than anyone else!

- Unearned Revenue – have you really earned it?
- Seasonality – should you be growing faster?
- How can you generate more leads and how can you convert them better?

At School is Easy we strongly recommended you hire a bookkeeper very early in the process. Your bookkeeper would be responsible for the day to day finances of the business; working in QuickBooks (QB), providing timely statements on an accrual basis and running critical reports to help you run your business. BTY, because you will know your business better than anyone, you will know which reports you want your bookkeeper to run and when, to enable you in your weekly, monthly and quarterly evaluation of data and your business.

Once your business starts growing you will come to a point when you feel it a struggle to manage the operation by yourself. At this point, you will want to consider hiring office help. The great thing about the School is Easy system is that it is portable. Remember, Opus is web based and someone can answer your phone from another location, schedule Learning

Consultations for you and make matches once student has been enrolled. That means you could have someone work from home or come into your home office and work. Completely up to you.

## Business & Office Administration

A good majority of your business operations and administration will involve working directly in Opus. Tasks will include those which are Tutor related, Client related as well as those which are Accounts receivable and payable related.

Below is a sample of such Opus related Admin tasks.

<u>Tutor Related</u>

Entering Tutors

Searching for a tutor

Provide tutor with access to Opus

Tutor Matching

Making a Match

<u>Client Related</u>

Entering Students / Parents

Bookkeeping & Acc'ts related

Entering Income

Receiving and entering payment

Ending a tutoring session

Refer to this outline and checklist for an overview of the main daily, weekly and monthly activities. Admin Tasks & Checklist

All Opus related tasks and guides can be found here: Franchisee Support Centre using the Search window.

## Finance, Best Practices

**#1 – Ready yourself for business**

- Set up the company, licenses, & tax accounts using professionals (lawyers and accountants are not bookkeepers)
- Establish a company calendar with aforementioned professionals, it will save time – then update it every month
- Hire the right bookkeeper and schedule time weekly & outside business hours, for entering data.

**#2 – Schedule time to review & evaluate**

Set a time to review critical reports that won't interrupt business:

- your initial projections for years 1 and 2 are critical (and wrong) so adjust them monthly
- you should update these monthly yourself to really know the numbers

**#3 – Financial Help**

- Have your bookkeeper use SIE Chart of Accounts and do the bank recs at the first of each month
- Meet with your FDD as close to month end (scheduled) and update your forecast – 1 hour
- Meet with your accountant each quarter with your financial reports to discuss ratios

**#4 – Unearned Revenue**

- Know yourself and address your strengths and weaknesses (as it relates to unearned revenue)
- If you are an accounting type – keep a spreadsheet or use QuickBooks to track your unearned revenue
- If you are the opposite – consider a second bank account – but keep track of unearned revenue.

**#5 – Onward and Upward**

- Join the Support Office calls for collaboration and companionship – you are not alone!
- Learn from your mistakes – if you don't make any then you may not be pushing hard enough
- Think constantly about improvements – more leads, more conversions, more students, = + profit!

# Part VIII: Summary of Your Obligations & Operating Requirements

## Responsibility of Franchisee

In addition to the mutually agreed upon terms in the Franchise Agreement, it is important to understand the roles and responsibilities of being a School is Easy Franchisee.

It is vital to realize that you are indeed an independent business person and as with any other businesses, you can expect to succeed through your own efforts, acumen and time put into your business.

**Specific Responsibilities**

- Maintain the corporate image of School is Easy in every detail on the premises, vehicle, signs, stationary, social media platforms, community events etc.… All advertising must bear an approved School is Easy logo.

- Work with professionals for accounting, legal issues etc. Protect the interest of your business and of the franchise group.

- The franchisee agrees to manage all relevant data through SIE's OPUS system, including all lead management information, customer and tutor information, schedules, and payment processing. Session logs must be posted by tutors on the same day of the session.

- Communicate relevant information monthly and annually in accordance with this manual and your franchise agreement

- Pay franchise royalties, branding contributions, technology fees, liability insurance and all accounts on time to strengthen the franchise group and preserve School is Easy integrity in the marketplace.

- Independently promote the business within your Territory.

- Monitor and strive to better the service provided by you and your staff.

- Provide School is Easy standards of service to your customers.

- Inform Support Office of any problems occurring within your business.

- Communicate freely with your franchisor support person.

## FRANCHISEE REPORTING REQUIREMENTS

As outlined within you Franchise Agreement, there are a number of requirements which are to be consistently adhered to and executed on a timely bases. In addition to all clauses within your Agreement, please make yourself intimately familiar with the following and review your Franchise Agreement for additional details.

### 1. Payments to Franchisor

All Franchisees shall refer to their Franchise Agreement as it relates to their fees.

**Due Dates:** by the fifth (5th) day of each Month

Requirement: Royalty Fee, Branding Fund Contribution, Technology Fee, and Website Fee

**2. Bookkeeping**

Franchisees are required to keep accurate and up to date books using QuickBooks Software. School is Easy Inc./ School is Easy USA, LLC has the right to request reports at any time.

**3. Reports and Financial Statements**

You agree to submit financial and operational reports and records to us at the times and in the manner specified.

**Due Dates**: (below)

1. Within 60 days after the end of each fiscal year – Balance sheet, Profit and loss statement and statement of retained earnings

2. And within 30 days of filing, a true copy of all returns, schedules and reports filed by the Franchisee for income, corporate or sales tax purposes (FA, section 10, 2a & b)

**4. Business Insurance**

**Due dates:** The insurance policy or policies must be in effect before you undertake any activities under your Franchise Agreement.

Requirement: As per your Agreement, either School is Easy Canada Inc. or School is Easy USA, LLC

- √ must be named as an additional insured in the policy or policies (statutory policies excepted).
- √ Must receive a copy of your current Certificate of Liability Insurance with aforementioned listed as an additional insured.

Note: refer to your Franchise Agreement for additional insurance criteria. (FA, Section 11)

**5. Audit Cooperation**

**Timing of Audit**: with reasonable prior notice to Franchisee

Requirement: SIE Franchisor has the right to inspect and audit your books and records, your federal, state and local tax returns, and any other forms, reports, information or data that we may reasonably designate.

Note: refer to your Franchise Agreement for additional criteria. (FA, Section 10.4)

**6. Competitive Business**

Requirement: As defined within your Agreement, and without our prior written consent, you agree not to own, manage, engage in, be employed by, advise, make loans to, consult for, or have any other interest in any Competitive Business. (FA, Section 12. 1 and 2)

**7. Brand Consistency**

Requirement: Franchisees are required to represent the School is Easy brand as described in the School is Easy Brand Guide. Altering the brand outside of those regulations would cause a franchisee to be in default of their agreement.

**8. Marketing Spend - Local Advertising and Promotion**

**Timing**: Initial Campaign, and Monthly & Annually

Requirement: you agree to conduct an initial marketing campaign and spend the minimum dollar amount as designated in your Agreement, in connection with your initial marketing campaign. In addition, you must invest a minimum amount in local advertising and promotions in any month and not less than the combined minimum amount in any twelve month period

Note: refer to your Agreement for all particulars (FA, Section 8.1 and 8.9)

**9. Approved Advertising Channels and Marketing Materials**

**Timing**: submit for approval prior to use if not prepared or approved by Franchisor in the previous year

Requirement: You agree to conduct all advertising in a dignified manner and to conform to the standards and requirements we periodically specify in the SIE Brand Guide or in other written materials

- √ You are to submit to us, for our approval before your use, all proposed plans, promotion materials, and advertising that we did not prepare or approve in the previous year. This includes but is not limited to, print and digital marketing materials, public facing advertisements or websites.

**10. Marketing Information**

Requirement: In an effort to enhance the School is Easy system with valuable information and metrics about the marketing and operations of local SIE locations, School is Easy Canada Inc. / School is Easy USA, LLC requires monthly input of your marketing efforts into Opus.

For more information, please review the article link below

Marketing Metrics Reporting

## 11. Confidentiality

**Timing**: During and after the term of your Agreement

Requirement: you may not communicate, divulge or use for any purpose other than the operation of the Franchised Business any confidential information, knowledge, trade secrets or know-how which may be communicated to you or which you may learn by virtue of your relationship with us.

Note: refer to your Agreement for all particulars (FA, Section 7.2)