

# Streamlining document generation can reduce your risk

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As the key vehicle for informing franchisees, the Franchise Disclosure Document (FDD) is critical to the franchise contracting process. For many franchisors, putting together necessarily complex FDDs and contract packages can be a frustrating exercise. Streamlining this process can reduce errors, make the experience less cumbersome, and facilitate compliance.

In streamlining your franchise contracting process, first look for ways to optimize your document generation with automation. This can be accomplished in various ways, from leveraging a mail merge for the simplest fields of franchisee specific information to fully automating your documents through a logic-fueled contract automation software.

Many franchisors tend to rely on administrative staff to manually put together FDD and contract packages which is problematic because it can be inefficient and introduces the potential for mistakes. Depending on the size of the organization, several different people could be involved in handling the information and following inconsistent approaches to preparing the same documents. These people may not be aware of what constitutes a compliant FDD and the broader implications for the business if noncompliant documents are used for disclosure and contracting.

Whether you are a large franchisor contracting with hundreds of franchisees in a given year, or a small franchisor with plans for growing your network, it will be difficult to scale if you're preparing your franchise documents manually.

## Put technology to work

Even using a very simple technology-based solution, like a mail merge function for certain standard and repeating pieces of information like names, addresses, and more, can make a considerable difference in the consistency and quality of your franchise documents.

Document automation software, however, is a better solution as FDDs and franchise agreements are often extremely complex and require programmable logic, such as scenario-based amending agreements, different information required across different provinces, documents or fields that only need to be completed once when a franchisee first joins the franchise network and not on a renewal, and various site-specific information forms for different channels or brands on the same form of disclosure.

By putting document automation software to work you can maintain relevant franchisee information in one centralized database which you can use to generate different sets of customized documents quickly. This approach minimizes the overall amount of time spent gathering information and generating documents, and reduces the possibility of introducing errors each time.

Once in place, business knowledge lives in the document automation technology instead of within a particular person or group of people. Those people can now focus their time on

other, more valuable tasks.

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Whether you are growing your franchise network or maintaining relationships with existing franchisees, it is important that your FDDs and franchise agreements are accurate, delivered efficiently, and signed and approved by the right parties at the right times. If you need help with any or all of the above, our franchise disclosure and contracting solution might be right for you. [Osler Dash™](#) automates your franchise disclosure and contracting process through an easy to use, interactive platform.

Find out how [Osler Dash](#) can work for you.