

# Your Guide to **TAB FRANCHISE OWNERSHIP**

Positively impact your local business community and be known as a leader of strong, satisfied, successful entrepreneurs.



**THE ALTERNATIVE BOARD**



## WHERE TO MEET FOR SUCCESS

Since 1990, The Alternative Board has helped over 25,000 business owners and CEOs worldwide achieve their dreams by running their businesses more strategically. Operating in more than 21 countries, TAB is the world's largest franchise system providing peer advisory boards and business coaching for business leaders.

We offer busy entrepreneurs a powerful, streamlined program well-adapted to the virtual needs of the twenty-first

century. TAB Members pay monthly dues for our high-caliber services, which include peer advisory boards, one-on-one coaching, expert speakers, robust business tools and invaluable TAB connections.

With the TAB system, TAB Members grow their businesses with practical, real-world solutions. To see what TAB does and how our system benefits TAB Members, please take a look at this two-minute [animated video](#).

## STAY AHEAD IN A RAPIDLY CHANGING WORLD

TAB Franchise Owners and their Members are uniquely positioned to succeed in a constantly evolving business environment thanks to our commitment to virtual support. We've crafted systems and protocols to ensure an effective digital experience across all of our offerings.

Whether it's the services we offer our Members or support for our Franchise Owners, TAB has streamlined your ability to connect online. We offer support and training for Franchise Owners to ensure that you can build your business from the comfort of your home or office.

You'll have virtual opportunities for:

- Meeting one-on-one with Member prospects
- Producing group events with prospects
- Holding board meetings
- Providing executive coaching
- Facilitating StratPro strategic planning sessions
- Training people on management development



**Established for over 30 years, our Franchise Owners have helped more than 25,000 business owners achieve their personal and business goals.**

## **FREEDOM. FULFILLMENT. BALANCE.**

A TAB franchise offers successful business leaders a real sense of financial freedom, personal satisfaction and flexibility.

Benefits of TAB Franchise Ownership include:

- Low operating costs
- Flexibility to achieve a work-life balance
- Sharing your expertise to help others flourish
- Proven equity-building business
- Strong exit strategy

For decades now, our Franchise Owners have helped tens of thousands of business owners achieve their personal and business goals. TAB is an equity-building business (based on protected territory and recurring long-term income streams), and we will work with you from the outset on strategies to maximise your net profits.

“I have been a TAB franchisee since 2004, and I am very pleased to state that my cash flow is dependable. I have access to, and from time to time use, the TAB tried and true method of attracting new Members. I have a very recognised brand, and I am never alone! On a regular basis I am able to tap into the massive wealth of expertise and experience that my fellow TAB franchisees have, and equally importantly I have easy access to the wonderful support staff at the TAB Home Office -- who have demonstrated time after time that they are poised at any time to help me to continue to succeed.”

**John Womack, Canada**



With hands-on marketing, IT support and personal coaching to ensure you meet your own business goals, you can be confident of our commitment to you.

## A CULTURE OF SUPPORT

TAB is built on a foundation of respect for shared experiences and collective wisdom, and that value is embedded in how we support our Franchise Owners. We provide exceptional training and ongoing support from day one. We've got decades of experience helping new Franchise Owners launch their businesses, as well as ongoing collective support for ensuring your franchise thrives.

- Daily telephone support for the first two weeks to reinforce the process
- Targeted support for six months focused on Member recruitment
- Monthly Peer Board Meetings with your fellow Franchise Owners to share experience and knowledge
- Weekly Member acquisition and Member retention group coaching calls
- Annual international TAB Franchise Owner conference

“Unlike starting another new business, with TAB you get great back-up and support every step of the way. I’ve had a fantastic collaboration with the home office and have found the entire process to be enormously satisfying. The work of a TAB Franchisee can be demanding, but the benefits are enormous.”

**Frank Kolbe, Master Partner,  
TAB Germany**

“TAB, throughout its [more than thirty year] history, has developed an amazing portfolio of tools and processes and support to help any franchisee who has the commitment and desire to be successful—be successful.”

**Joe Zente, TAB Austin, Texas**



## YOUR JOURNEY TO SUCCESS

Our training program ensures our new Franchise Owners are confident and capable from the very beginning. We'll support you in recruiting Members to establish TAB Boards and in providing the full range of TAB services to retain those Members for the long term.

During our intensive and interactive training course, our Home Office team will guide you step-by-step through the essential areas of:

- Marketing for and acquisition of new Members
- Interviewing and closing new Members
- Strategies for Board composition
- Using the full range of TAB's proprietary tools
- Facilitation techniques
- Running coaching sessions
- Member retention

All of our training is highly participatory. We're firm believers that to truly learn something, you have to do it for yourself.

### HIGH IMPACT MANAGER® TRAINING


One of TAB's core values is lifelong learning. As a trusted advisor and a coach to business owners, there will always be areas for you to grow in knowledge and experience. In addition to our initial training, TAB offers a

24-topic management development training program called the High Impact Manager® Training Program.

Designed to provide New TAB Franchise Owners with the tools they need to guide their Members, the High Impact Manager® Training curriculum will ensure you can fill any gaps in your expertise. Completed over a 12 month-period, the program helps ensure that TAB Franchise Owners are fully educated on key business areas facing private business owners and are confident in coaching them across all areas of their business.

“When I purchased my franchise, TAB represented for me and still represents the best of all possible ways to create what I call a ‘lifestyle enterprise.’ It enables me to control my hours; to use my accumulated expertise to the benefit of others (a very important part of my Personal Vision); to earn a very solid monthly income to supplement and (of necessity) strengthen my ‘retirement’ accounts. Most importantly, it challenges my mind and my competitive spirit on a daily basis. It gives me freedom without boredom.”

**Bernie Moscovitz, TAB  
Franchise Acquisition Specialist**



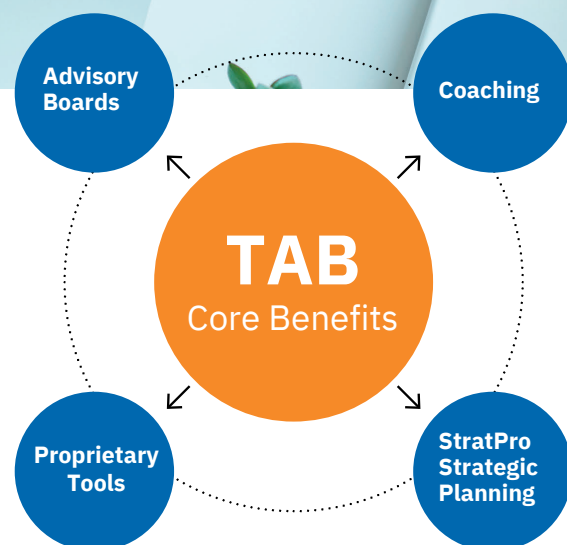
**"[TAB] Makes me focus on my business during the meetings and coaching sessions, taking a hard look at myself and my company with the perspective of some very sharp people who only have my interest in mind."**

Ken Drossman, President, Lakeview Business Consulting, LLC and TAB Board Member

## **SHARED IDEAS. SHARED RESOURCES. SHARED CONNECTIONS.**

Using exclusive TAB planning and development tools, our Franchise Owners unlock the real-world experience and skillsets of their Board Members to deliver an invaluable and inspiring service.

The heart of the TAB Member experience is the peer advisory board. In a candid and confidential setting, decision makers from non-competing companies in diverse industries meet to solve problems and evaluate opportunities in their markets. Along with discussing the business challenges they face and exploring new possibilities for increased productivity and profitability, Members also hold each other accountable for results.



Beyond their monthly Board Meetings, one-to-one coaching and business tools, Members also have access to exclusive benefits including:

- Educational webinars
- Member-only LinkedIn groups
- Member hotline
- TAB Connect



## DO WHAT YOU LOVE. OWN YOUR OWN BUSINESS. ACHIEVE FINANCIAL REWARDS.

TAB Franchise Owners make a difference in the businesses and the lives of their Members. Our network of high-caliber professionals are respected leaders in their own business communities with a passion for sharing their knowledge and experience in order to help others succeed.

Becoming a TAB Franchise Owner provides you with the opportunity to own your own business and make the key decisions to control your destiny. You'll also be backed by a passionate and committed world-class support system made up of people who know the advantages of owning a franchise. Buying a TAB franchise allows you to experience all the professional freedom and rewards associated with running your own business without the stress of starting from square one. Why reinvent the wheel? It's business with a safety net.

"Being part of the TAB family has been a great experience. My income has steadily grown as I have focused on growing my business. Additionally, the professional and personal growth I have experienced working with TAB and my TAB Members has been fun and extremely rewarding."

**Blair Koch, TAB Franchise Owner, Denver**

"TAB gives me the perfect balance between owning and running my own business and still having the support of a franchisor. I have over 30 years of experience behind me so I don't have to make the same mistakes that were made in the past. I can't express how valuable that has been to me."

**Don Maranca, TAB Franchise Owner, San Antonio**



## INCOME POTENTIAL

The TAB model provides a significant and flexible opportunity for a steady and healthy income:

- It is a subscription model where Members pay monthly Membership dues.
- The monthly dues provide a reliable monthly income, unlike the “feast or famine” model which is common with consulting businesses.
- Franchise Owners become the trusted advisor of their Members. As a result, when a Member needs help, they turn to TAB. A significant additional opportunity exists for consulting income.

While we cannot make any promises about the amount of income a TAB Franchise Owner will make in their business, we are able to share information from Item 19 of our Franchise Disclosure Document. Specifically:

- Top third of Franchise Owners gross Membership dues, Business Assessment Fees and Strategic Business Leadership Coaching fees ranges US \$120,144 - US \$528,101
- Additional income as reported by Franchise Owners from the TAB opportunity earned by the top third of Franchise Owners ranges from US \$75,000 - US \$435,000
- Combined Membership dues and additional income as reported by Franchise Owners from TAB opportunity earned by the top third of Franchise Owners ranges from US \$305,055 - US \$851,655



## IS OWNING A TAB FRANCHISE RIGHT FOR YOU?

There's no right or wrong background to come from to be a successful TAB Franchise Owner. There's no golden qualification or former position held that will make you a great success as a TAB Franchise Owner. The only thing guaranteed to ensure your success is YOU.

TAB Franchise Owners come from a wide variety of backgrounds. A typical new TAB owner was previously a successful executive in a large company, an owner of another business or a strategic business consultant. Many new TAB owners that have an existing consulting business join TAB to serve as a complement to their existing business.

As with any business, what you get out depends on what you put in. Our most successful Franchise Owners are:

- Self-motivated with the drive to succeed
- Compelling communicators
- Passionate about helping fellow business owners
- Committed to achieving personal and professional growth through tenacity and hard work

Our ideal candidates are transitioning executives, experienced consultants and former business owners with significant business experience in a senior-level role—either in a corporate environment or as a consultant to business executives. Regardless of specific background, however, we provide a comprehensive training and support program to assist candidates to be successful as TAB Franchise Owners.

“TAB is the perfect fit for me. It gives me the opportunity to utilise two of the activities I enjoy most; helping business owners move their business forward and using skills that I have obtained over the years from my corporate experiences as well as my business owner experiences. The skills and strengths that my husband and I have complement and offset the weaknesses that we each have, making for a perfect working relationship. Our combined skills add value to our Members, making their experiences richer and more productive. At this point in my life, I can't imagine doing anything else.”

**Mary Williams, TAB Franchise Owner, TAB West Fairfax**



## HOW TAB FRANCHISE OWNERS HELP THEIR COMMUNITY

As a TAB Franchise Owner, you will nurture the growth of local businesses and business leaders. Through a platform of knowledge and guidance, you will deliver real-world advice that provides a results-driven advantage to help business owners stay focused on what matters most. The impact you have will ripple through your community as you facilitate positive change.

Running dynamic, Membership-only Board Meetings every month, you'll assist Members in pooling their knowledge and experience for the benefit of the group. In addition, you will provide individual coaching sessions to Members, using TAB's proprietary tools and processes. Working one-on-one with TAB Members, you will analyse their businesses and help them create a customised strategic plan that will allow them to reach their business objectives and personal vision.

"I have been working with The Alternative Board since 2013 and it has proved to be hugely beneficial for me, during a period where my business has rapidly expanded. TAB has really helped me map out where I want the business to go and set specific strategies and actions to make it happen. I really value the accountability that the TAB Board provides me and the interaction with other business owners really provides a platform where you can get peer level input into a wide variety of issues and decisions. I would highly recommend to anyone within business, who does not have their own director level team, to embrace the peer board concept."

**Ian Kirk, Opportunity  
Marketing and TAB Board  
Member**



## MAKE AN INVESTMENT IN YOURSELF

You've probably made lots of investments over the course of your life. Owning a TAB Franchise provides you the opportunity to invest in yourself.


You've likely accumulated a wealth of business knowledge over your career. Investing in a TAB Franchise allows you to leverage this asset and control your own destiny. Purchasing a TAB Franchise begins with a modest investment that has the potential to lead to a significant income, and is also an equity-building asset that you can then sell when you are ready to retire or pursue another venture.

Unlike a consulting business, the TAB Business Ownership opportunity is not built around the knowledge and relationships of the business owner. Because the Board Members receive value from their peers, the Boards can continue to thrive with another facilitator. Moreover, the TAB model

allows for the TAB Franchise Owner to hire other facilitators, which provides a scalable model for income growth. A successful TAB Business becomes a performing asset that can be quite valuable when the owner decides to sell.

TAB offers three different franchise opportunities: the Major Market Franchise, the Non-Major Market Franchise, and the Small Market Franchise.

The Major Market (MM) Franchise fee is \$44,000. The NonMajor Market (NMM) Franchise Fee is \$29,500, the Small Market (SM) Franchise fee is \$19,500, and the minimums are less than a Major Metro franchise. All of these fees do not include marketing or training fees. All options include our comprehensive support package, providing everything you need to successfully launch and run your TAB business.



**There are NO fees or dues paid to corporate for consultancy work that you undertake for your Members.**

- Exclusive territory
- Comprehensive initial training
- Member acquisition and retention group calls
- Launch support
- One-to-one coaching and mentoring
- Monthly peer board Membership
- Advanced sales and marketing training

Our Franchise Owners can maximise profits from low overheads since your TAB Franchise requires no stock and no permanent premises. Set-up costs are kept to a minimum as you can work from home. With our virtual options, you don't even need a venue for your monthly Board Meetings.

## NETWORK GROWTH

In order to sustain the growth of TAB's network and to fund national marketing campaigns, TAB Franchisees pay the following monthly management service fees:

- TAB Royalty fees—20% reducing to 10% on gross annual revenue from the TAB opportunity in excess of US\$125,000
- International Marketing Development Fund—1% on TAB fees increasing to 2% after 36 months.



## THE TAB NETWORK LEGACY

In addition to our Home Office team, you also have the benefit of the combined knowledge and experience of your fellow Franchise Owners: an extensive network of high-caliber professionals; people just like you!

In the Board Meetings they facilitate, our Franchise Owners harness peer power,

and that value is at the heart of TAB's Franchise network.

With access to TAB's worldwide network via email, online forums and annual conferences, you're never far away from someone who truly understands your business.

## A CHOICE SELECTION

Now that you know more about us, we'd love to hear from you with your questions, thoughts and ideas about our opportunity.

- What are your goals for the future?
- Where would you like to see your business take you?
- Are you excited at the thought of controlling your own time?
- How could you use the flexibility offered to improve your lifestyle?

Our selection process is a two-way street. We want to learn about you just as much as you want to learn about us.

Your goals and aspirations are as important to us as they are to you. They are what drive you, and we consider it a privilege to be able to work together in order to form a strong, rewarding and profitable partnership.

Most importantly, we want to protect the strong brand that we've built and enrich our collective Franchise Owners, which is why we will only award franchises to those who share our values, our ethics and our desire to succeed.

"I found the recruitment process very helpful, open and informative. There weren't any pushy aspects, and it went at a pace that suited me. I was very well informed and went on a Discovery Day which was hugely helpful in my decision making process. I was encouraged by TAB to take the proper steps of due diligence to ensure that I got a good rounded view of what the TAB experience was going to be and what the offering was. So that was a real positive in my decision to choose TAB."

**Mike Tabernacle, TAB Franchise Owner, South Lancashire**



## YOUR NEXT STEP

The next step in our recruitment process is a conversation with a TAB Franchise Specialist.

If you feel you meet our criteria and would like to further discuss the TAB opportunity, please email [TABFran@TheAlternativeBoard.com](mailto:TABFran@TheAlternativeBoard.com) for more information.

“The community of TAB is the strongest part of their culture. Because of this strong willingness to help each other out, it is an interesting environment to be in. Everyone has basically the same job, but everyone does it differently, and no one is competing with you.”

**Laura Drury, TAB Franchise Owner, TAB Focused Directions (Colorado)**