



## Case Study

**Speed, Automation,  
and Growth:**

# The CRM That Transformed BAI's Franchise Success

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What's great about ClientTether is it's built by people in the franchise space for franchise development specifically.

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**Brandon Clifford**

CEO of Business Alliance, Inc. (BAI)



# Summary

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For over three decades, Business Alliance, Inc. (BAI) has been a leader in the franchise industry, connecting aspiring entrepreneurs with the right franchise opportunities. As a trusted resource, BAI provides brokers, brands, and investors with the training, tools, and network they need to navigate the complex world of franchising. Their commitment to ethical franchise development and personalized support has made them a go-to partner for franchise growth and expansion. By fostering a collaborative community, BAI empowers individuals to achieve their entrepreneurial dreams through franchising.

However, managing a large network of brokers—many of whom come from non-sales backgrounds—posed challenges. Many of BAI’s brokers come from non-sales backgrounds, making lead engagement difficult. Traditional CRM solutions lacked the automation and flexibility needed to ensure quick and consistent follow-ups. As BAI sought to scale, they needed a platform that streamlined lead management, simplified broker onboarding, and provided real-time insights into their consultant network.

**That’s when they turned to ClientTether—the Sales Automation Platform built specifically for franchise success.**

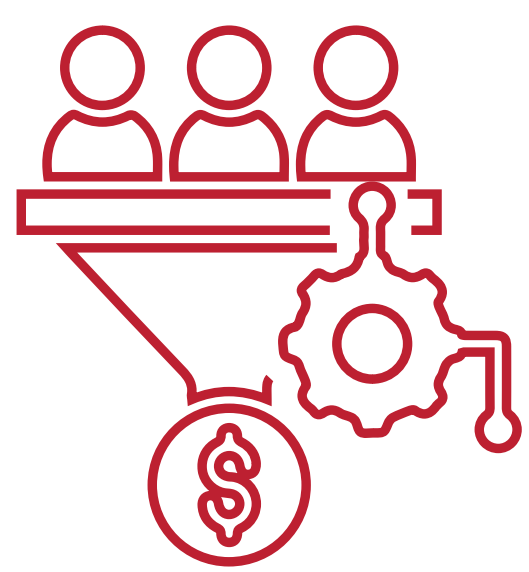




# The Challenges

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Before adopting ClientTether, BAI faced several operational challenges that hindered their ability to scale effectively:



## **Inefficient Lead Engagement**

BAI brokers, many of whom lacked prior sales experience, struggled to maintain fast and consistent communication with prospects, leading to missed opportunities.



## **Manual and Time-Consuming Follow-Ups**

Without automation, brokers had to manually follow up with leads, resulting in delays and lost prospects.



## **Complicated Broker Onboarding**

New brokers faced steep learning curves with traditional CRMs, requiring extensive training and slowing down their ability to contribute effectively.



## **Lack of Visibility and Tracking**

BAI leadership had limited insight into lead progression, making it difficult to optimize processes and measure performance effectively.



## **Fragmented Communications**

Without a centralized system, brokers struggled to coordinate messaging and maintain strong relationships with potential franchisees.

# Benefits to BAI for Using ClientTether

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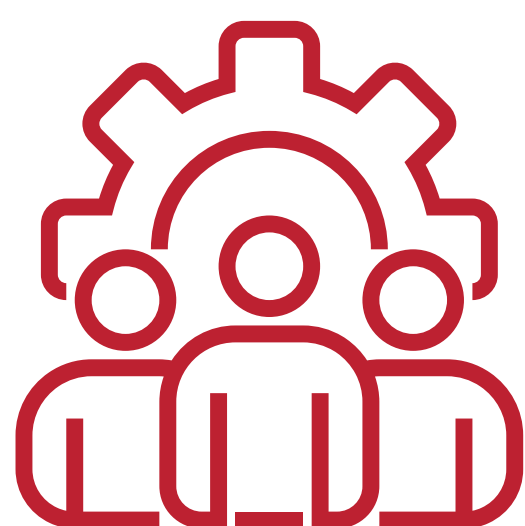
## Faster Lead Engagement

BAI saw a significant improvement in response times with ClientTether’s automated outreach system. This allowed brokers to build trust and maintain stronger connections with potential franchisees.



## Automated Follow-Ups

BAI struggled with maintaining consistent communication with potential franchisees. With ClientTether, brokers now have automated follow-up sequences that keep leads engaged without manual effort, reducing lost opportunities and increasing conversions.



## Reduced Broker Onboarding Complexity

Training new franchise brokers was previously time-consuming and inconsistent. ClientTether streamlined onboarding with automated workflows and built-in training modules, helping new brokers get up to speed quickly.



## Improved Lead Tracking & Reporting

Before implementing ClientTether, tracking lead progress across multiple brokers was challenging. The platform’s dynamic dashboards and reporting tools provided real-time insights, allowing BAI leadership to optimize strategies and improve broker performance.



## More Effective Franchise Matching

By ensuring timely and structured communication with leads, BAI has improved its ability to match qualified franchisees with the right franchise opportunities, leading to higher satisfaction for both franchisors and new franchise owners.



# In the Customer's Own Words

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Brandon Clifford, CEO of BAI, praises ClientTether for its user-friendly and efficient CRM platform, stating it helps brokers—many without sales backgrounds—**"engage leads effortlessly."**

He highlights key benefits such as Speed-to-Lead, Custom Action Plans, Global Oversight, On-the-Go Flexibility, and Dedicated Support. Clifford commends ClientTether's commitment to understanding BAI's unique needs, describing them as a proactive partner that goes **"above and beyond to support business growth."**

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## BUSINESS ALLIANCE

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Business Alliance, Inc. (BAI) has been at the forefront of franchise consulting for over 30 years. With a robust network of brokers, BAI helps aspiring entrepreneurs find the right franchise opportunities while providing franchisors with high-quality candidates

Learn more at [businessallianceinc.com/](https://businessallianceinc.com/)



# Impact Statement

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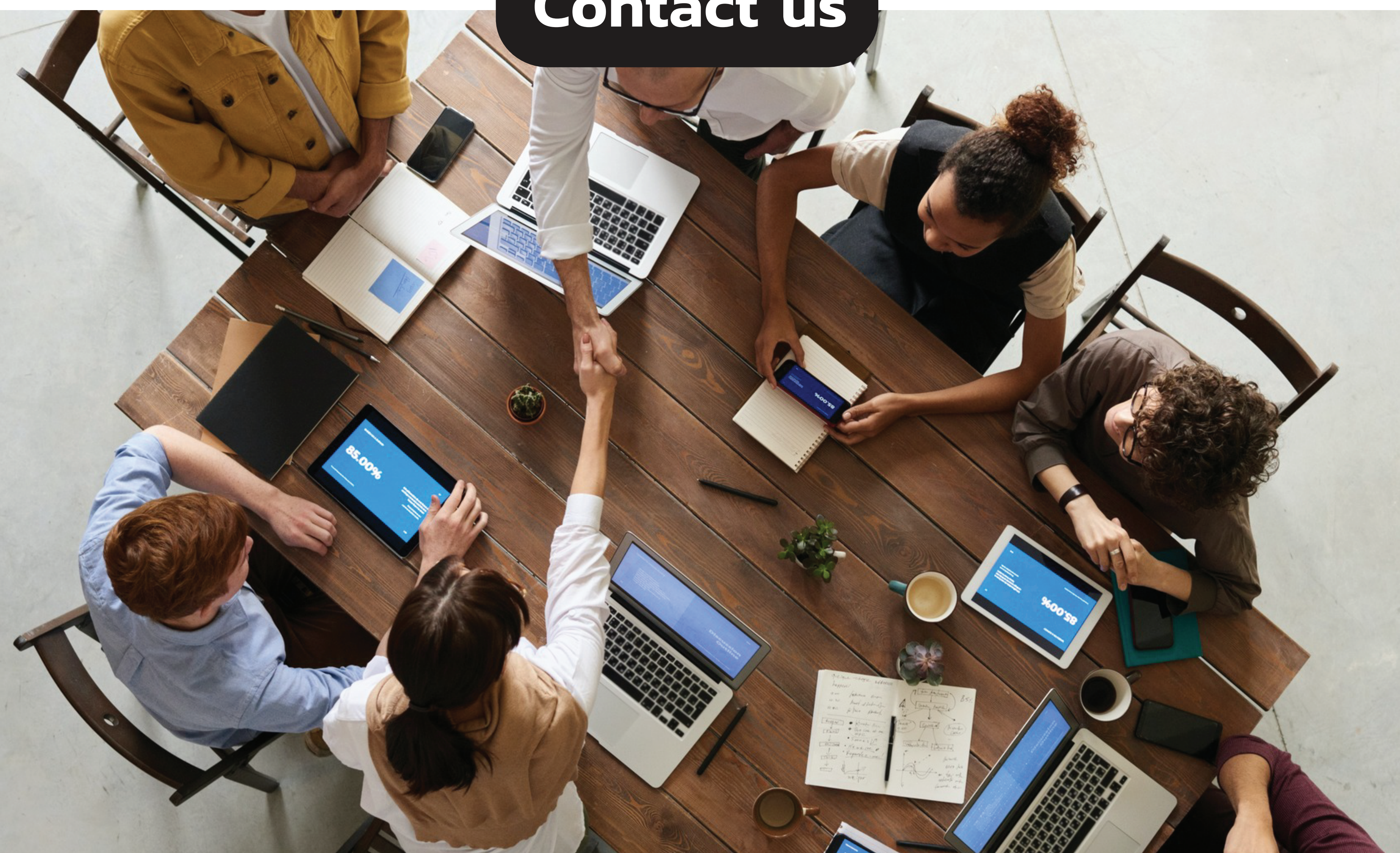
## The Bottom Line

With ClientTether, BAI has significantly increased lead conversion rates, reduced operational inefficiencies, and enhanced broker support. The automation of repetitive tasks has allowed BAI brokers to focus on strategic growth and personalized client interactions.

## The result?

A smarter, faster, and more scalable franchise development process, reinforcing BAI's reputation as a premier resource in the franchise industry.

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ClientTether The Franchise CRM