

## Case Study – Share Group

A regional foodservice broker agency wished to join a share group, but his company's large "footprint" caused geographic conflicts with existing share groups. He approached Franklin Foodservice Solutions to see if we could help form a new Agency Share Group.

We contacted the FSMA to obtain a list of agencies who were not currently affiliated with a share group. Then we worked with the founding agency to identify those he knew and felt would be appropriate members to our group. We worked together to create a Prospectus which described our vision for how the group would operate, and identified a list of candidates which had no geographic overlap.

Over the next three months, we sent invitations and had phone conversations with candidate agencies, eventually created the SMART Agency Share Group with 14 agencies. Over the past 5 years, we have met twice per year, with occasional conference calls in between.

As Facilitator, Franklin Foodservice Solutions:

- works with a member agency to plan each meeting
- develops the agenda
- arranges for guest speakers
- books all facilities
- writes bylaws
- manages group membership

Members consistently report that the value of the Share Group has continued to grow over the years, and that the relationships formed have paid off in informal ways as well as in the meetings.

