BOCA
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USING AI, DATA, AND OPERATIONAL STANDARDIZATION TO BUILD MORE SUSTAINABLE FRANCHISE SYSTEMS

USANDO IA, DADOS E PADRONIZAÇÃO OPERACIONAL PARA CONSTRUIR SISTEMAS DE FRANQUIA MAIS SUSTENTÁVEIS

UTILIZANDO IA, DATOS Y ESTANDARIZACIÓN OPERACIONAL PARA CONSTRUIR SISTEMAS DE FRANQUICIA MÁS SOSTENIBLES

https://doi.org/10.56238/bocav25n74-043

Data de submissão: 17/11/2025 **Data de publicação:** 01/01/2026

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ABSTRACT

Franchise systems fail or scale on replication: the ability to deliver a recognizable customer experience across independently owned units. Manuals, training, field visits, and financial reporting remain the base. What has changed is the volume of operating data and the availability of automation and artificial intelligence. This article argues that those tools improve consistency and supervision only after the network shares a common operating language—definitions for labor, conversion, ticket size, retention, and unit profit. With that language in place, shared dashboards can shorten the distance between a weak week and a useful conversation with the franchisee. Models can flag outliers, summarize field notes, and draft first-pass forecasts; they should not close a unit, rewrite Item 19, or decide employment matters without an accountable person. Drawing on NIST's Artificial Intelligence Risk Management Framework and IFA/FRANdata outlooks, the article treats validity, safety, security, accountability, and transparency as design requirements, not optional ethics language. Sustainable growth is framed as a living standards system plus competent operators, with data and models used as instruments rather than as a substitute for judgment.

Keywords: Franchising. Operational Standardization. Artificial Intelligence. Franchisee Support. Unit Economics. Data Governance. NIST AI RMF. Scalable Growth. Multi-unit Networks. Item 19.

RESUMO

Os sistemas de franquia falham ou crescem na replicação: a capacidade de entregar uma experiência de cliente reconhecível em unidades independentemente possuídas. Manuais, treinamento, visitas de campo e relatórios financeiros permanecem a base. O que mudou é o volume de dados operacionais e a disponibilidade de automação e inteligência artificial. Este artigo argumenta que essas ferramentas melhoram a consistência e supervisão apenas

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após a rede compartilhar uma linguagem operacional comum—definições para mão de obra, conversão, tamanho do tíquete, retenção e lucro unitário. Com essa linguagem em vigor, painéis compartilhados podem reduzir a distância entre uma semana fraca e uma conversa útil com o franqueado. Modelos podem sinalizar valores discrepantes, resumir notas de campo e redigir previsões de primeira passagem; não devem fechar uma unidade, reescrever o Item 19 ou decidir assuntos trabalhistas sem uma pessoa responsável. Baseando-se no Quadro de Gestão de Risco de Inteligência Artificial da NIST e nas perspectivas da IFA/FRANdata, o artigo trata validade, segurança, proteção, responsabilidade e transparência como requisitos de design, não como linguagem ética opcional. O crescimento sustentável é estruturado como um sistema de padrões de vida mais operadores competentes, com dados e modelos usados como instrumentos em vez de substitutos para o julgamento.

Palavras-chave: Franquia. Padronização Operacional. Inteligência Artificial. Suporte a Franqueados. Economia Unitária. Governança de Dados. NIST AI RMF. Crescimento Escalável. Redes Multiunidade. Item 19.

RESUMEN

Los sistemas de franquicia fracasan o crecen en la replicación: la capacidad de entregar una experiencia de cliente reconocible en unidades de propiedad independiente. Los manuales, la capacitación, las visitas de campo y los informes financieros siguen siendo la base. Lo que ha cambiado es el volumen de datos operativos y la disponibilidad de automatización e inteligencia artificial. Este artículo argumenta que estas herramientas mejoran la consistencia y la supervisión solo después de que la red comparte un lenguaje operativo común—definiciones para mano de obra, conversión, tamaño del ticket, retención y ganancia unitaria. Con ese lenguaje en lugar, los paneles compartidos pueden acortar la distancia entre una semana débil y una conversación útil con el franquiciado. Los modelos pueden señalar valores atípicos, resumir notas de campo y redactar pronósticos de primer paso; no deben cerrar una unidad, reescribir el Artículo 19 o decidir asuntos laborales sin una persona responsable. Basándose en el Marco de Gestión de Riesgo de Inteligencia Artificial de NIST y las perspectivas de IFA/FRANdata, el artículo trata la validez, la seguridad, la protección, la responsabilidad y la transparencia como requisitos de diseño, no como lenguaje ético opcional. El crecimiento sostenible se enmarca como un sistema de estándares de vida más operadores competentes, con datos y modelos utilizados como instrumentos en lugar de sustitutos del juicio.

Palabras clave: Franquicia. Estandarización Operacional. Inteligencia Artificial. Apoyo a Franquiciados. Economía Unitaria. Gobernanza de Datos. NIST AI RMF. Crecimiento Escalable. Redes Multiunidad. Artículo 19.

The standing problem in franchising is replication: how a company delivers a recognizable customer experience across ten, fifty, or several hundred independently owned locations. Manuals, training, field visits, audits, and financial reporting remain the base. What has changed is the volume of operating data and the availability of automation and artificial intelligence. Used with discipline, those tools can make a network more consistent and easier to supervise. Used as decoration, they accelerate a weak process (National Institute of Standards and Technology [NIST], 2023; International Franchise Association [IFA] & FRANdata, 2025).

1 STANDARDIZATION CREATES THE DATA

AI does not invent a common language. If each location codes labor, leads, and tickets differently, network reports are noise. Standardization—definitions for revenue, labor percentage, acquisition cost, conversion, ticket size, retention, service time, and unit profit—is what makes comparison possible. Only after that language exists can management look for patterns rather than anecdotes (IFA & FRANdata, 2022).

2 FROM DELAYED REACTION TO EARLIER SIGNALS

Traditional franchise supervision is often late. Cash tightens, and then the brand pays attention. A shared dashboard can surface earlier movement: conversion falling, labor rising, retention slipping, satisfaction scores bending. The aim is not a surveillance culture. It is a shorter distance between a weak week and a useful conversation with the franchisee (IFA & FRANdata, 2023).

3 AI AS SUPPORT, NOT AS THE FRANCHISOR

As networks grow, headquarters drowns in files. Models can flag outliers, summarize field notes, sort guest comments, and draft a first pass at demand or labor forecasts. They should not close a franchise, rewrite Item 19, or decide employment matters without a person who can be accountable. NIST's Artificial Intelligence Risk Management Framework treats validity, safety, security, accountability, and transparency as design requirements, not optional ethics language (NIST, 2023). Franchise systems handle personal data, financial data, and, in some concepts, health or employment data. Those uses need human review.

4 SUPPORT, LIVING STANDARDS, AND BENCHMARKING

A lean franchisor cannot put a consultant in every market. A current knowledge base, searchable procedures, and automated reporting let franchisees find approved answers and let field staff arrive with a prepared view of the unit. Technology should make the relationship more useful, not thinner.

Paper manuals age. Standards should be treated as a living system: review cycles, version control, and a path for a strong unit's practice to be tested before it is copied. Two units with similar sales can have very different labor or retention. Comparable data makes that difference visible so support can be specific.

5 GROWTH DISCIPLINE AND RESPONSIBLE ADOPTION

Each new unit adds an operator, a labor market, a customer base, and another source of variation. CRM for development, digital onboarding, and exception alerts allow a small headquarters to see a wider map. The 2025 IFA/FRANdata outlook placed franchise employment above nine million and output near $936 billion, while the companion franchisor survey still listed labor availability, quality, and cost among the leading operating constraints (IFA & FRANdata, 2025). Efficiency tools matter in that climate. They do not replace a model whose unit economics fail when wages rise.

Adoption should start with a business problem. Privacy, security, model error, and the cost of a wrong automated prompt all belong in the decision. Sensitive legal, financial, and employment questions stay with qualified people. The durable franchise system will not be a software company that happens to have operators. It will be a standardized operating system, competent franchisees, and leadership that uses data and models as instruments—not as a substitute for judgment.

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