

# TOUR TO TENURE

By EleVault.



# WELCOME

## to the Tour to Tenure Conversion Guide

Turning a first visit into a long-term membership, the tour to tenure, is at the heart of successful coworking management. Creating memorable tours, engaging prospects authentically, and delivering exceptional operations all play a vital role in converting visitors into committed members.

This guide is designed for community managers, sales managers, and everyone in between who plays a role in creating a seamless customer journey. The following pages explore each step of this process, offering practical strategies and tools to help coworking operators build thriving communities through every stage of the member journey.

### Here's What You'll Learn

- ✓ How to prepare your space and team to create an environment that attracts ideal prospects
- ✓ Proven prospecting techniques to generate qualified leads consistently
- ✓ The art of delivering impactful tours that close deals
- ✓ Best practices for smooth operations that enhance member satisfaction
- ✓ Strategies to boost member retention and engagement for long-term success



# Contents

|           |   |
|-----------|---|
| <b>4</b>  | - CH. 1 - SETTING THE STAGE               |
| <b>9</b>  | - CH. 2 - PROSPECTING LIKE A PRO          |
| <b>15</b> | - CH. 3 - THE ART OF THE TOUR             |
| <b>21</b> | - CH 4. - CLOSING WITH CONFIDENCE         |
| <b>26</b> | - CH 5. - RUNNING A SMOOTH OPERATION      |
| <b>32</b> | - CH. 6 - MEMBER RETENTION & ENGAGEMENT   |
| <b>37</b> | - CH. 7 - MANAGING CHALLENGES             |
| <b>42</b> | - CH. 8 - MEASURING SUCCESS & IMPROVEMENT |
| <b>47</b> | - OUR CONTACTS                            |
| <b>48</b> | - BONUS TEMPLATES                         |

# CHAPTER 1

# SETTING THE STAGE

---







## Setting the Stage - Opening Your Space with Intention

Your coworking space is more than just desks and Wi-Fi; it's a **carefully crafted hospitality experience** that shapes how your members and visitors feel from the moment they step inside.

Starting the day with intention sends a clear message: you care about quality, professionalism, and creating a space where people want to work, connect, and grow.

A clean, well-stocked, and inviting environment attracts high-value clientele who have high expectations, and it sets you apart from competitors who overlook the details. Simple, consistent opening routines create trust and a sense of comfort that encourages prospects to become members and to stay.

Think of your morning setup as your first sales pitch. Fresh coffee brewing, uncluttered surfaces, and welcoming lighting all add up to an atmosphere that feels both energizing and professional.

In this chapter, you'll find practical checklists and exercises to help you build your own opening routine and audit your space for opportunities to delight your members every day.

# 1. Opening Routine & Checklist


Keep a checklist as your go-to routine every morning to ensure your space is welcoming, professional, and ready to impress. Consistency here builds trust and sets a positive tone for the day. Use this as a foundation and customize based on your space’s unique needs.

- ☐ Brew fresh coffee and refill beverage station
- ☐ Wipe down all surfaces and common areas
- ☐ Restock supplies: creamer, sugar, cups, etc.
- ☐ Check bathrooms and kitchen areas for cleanliness

# 2. Space Audit: Opportunities to Impress

Regularly auditing your space helps you catch small details before they become big problems. Walk through your space with fresh eyes and honestly assess each area. Use this exercise to identify quick wins and longer-term improvements that elevate the member experience.

| Area              | Current State | Improvement |
|-------------------|---------------|-------------|
| Entrance          |               |             |
| Reception/Welcome |               |             |
| Common Areas      |               |             |
| Conference Rooms  |               |             |

 **BONUS ITEM:** Printable Opening Checklist (checklist on pg. 50)



### 3. Cleaning Checklist

A clean environment is critical to member satisfaction and safety. A thorough checklist supports your ongoing commitment to excellence by keeping high-touch and common areas fresh throughout the day.

- ☐ Wipe down high-touch surfaces regularly
- ☐ Clean out community refrigerator weekly
- ☐ Vacuum and sanitize meeting rooms before each use
- ☐ Organize front desk and remove visual clutter
- ☐ Clean coffee machines and beverage stations



Sometimes you can become blind to issues within your space by spending too much time in it. Bring in unbiased peers, or a secret shopper, to walk through your space and note areas of improvement.

### 4. Your Commitment to Consistency

Setting a clear intention for how you want members and visitors to feel each morning helps you and your team align on what “ready” really means. Write a short statement that captures the atmosphere and experience your workspace should create. Refer back to this statement in training.



When someone walks through our doors, they should feel \_\_\_\_\_, \_\_\_\_\_ and confident that this is a space where they \_\_\_\_\_ and \_\_\_\_\_.

## 5. The Power of a Warm Welcome

Your front desk staff are the first people visitors and members meet, making their warm, genuine greeting crucial for setting a positive tone. Simple gestures like eye contact, a smile, and offering a beverage help build immediate rapport - creating a seamless first impression that boosts member conversion.

### Sample Welcome Script & Responses:

#### Front Desk Staff

"Welcome to [Business Name]! I'm Jane, the Community Manager. How can I help you today?"

#### Guest 1

"I'm here for a tour."

#### Front Desk Staff

"That's great! Can I offer you a coffee or water while you wait? Our Sales Manager will be with you shortly, and you can make yourself comfortable here."

#### Guest 2

"I'm visiting a member."

#### Front Desk Staff

"Perfect! Would you like something to drink while you wait? I'll check in with the member and let you know as soon as they're ready to see you."

#### Guest 3

"I'm here for a meeting."

#### Front Desk Staff

"Welcome! Your room is ready. Can I get you a beverage before I show you to the meeting room? If you need anything else during your visit, just let me know."



# CHAPTER 2

# PROSPECTING

# LIKE A PRO

---



## Prospecting Like a Pro - Finding Ideal Members

Growing a thriving coworking community starts with finding the right people - the members who will bring the right energy, collaboration, and stability to your space. Prospecting isn't about chasing every lead; it's about targeting those who align with your space's culture and offerings.

In this chapter, you'll learn how to identify your ideal members, where to find them, and how to approach them authentically.

Discover strategies to build meaningful connections and fill your tours with qualified prospects who are excited to join your community.

Successful prospecting is a mix of research, relationship-building, and intentional, clear communication - all skills you can develop with practice. Use the exercises and tools here to sharpen your approach and make every outreach count.





# 1. Define Your Ideal Member Profile

Get clear on who your space serves best. Consider industry, company size, work habits, and values. The more specific you are, the easier it is to focus your efforts.



Describe your ideal member in detail:

Industry: \_\_\_\_\_

Company Size: \_\_\_\_\_

Work Style (remote, hybrid, in-person): \_\_\_\_\_

\_\_\_\_\_

Values & Culture fit: \_\_\_\_\_

# 2. Target Your Outreach Channels

Where do your ideal members spend their time? It might be local business groups, coworking networks, LinkedIn, or industry events. Focus on quality over quantity by engaging where your best prospects already are.

| Channel/Place | Why it Fits           | How You'll Engage |
|---------------|-----------------------|-------------------|
| LinkedIn      | Professional Platform | Post & Comment    |
| Local Chamber |                       |                   |
| CRE Brokers   |                       |                   |
|               |                       |                   |
|               |                       |                   |

 **BONUS ITEM:** Ideal Client Worksheet (worksheet on pg. 51)

### 3. Build Genuine Relationships

Prospecting is about connection, not just sales. Start conversations with curiosity and listen more than you talk. Share your space's story and how it supports members' goals, rather than pushing a hard sell.

#### **Networking Checklist:**

- ☐ Start with open-ended questions (e.g., "What brings you to this event?")
- ☐ Share your story briefly - what makes your space unique
- ☐ Avoid interrupting or dominating the conversation
- ☐ Exchange contact information naturally
- ☐ Follow up within 24-48 hours to keep the connection warm

### 4. Craft Your Outreach Message

Be clear, concise, and personalized. Reference something specific about the prospect to show you've done your homework and invite them in for a tour without immediately asking for an exchange or pushing a sale.

#### **Outreach Prompt:**

"Hi [Name], I noticed your work with [company/industry] and thought you might find our coworking community supportive of your goals..."

#### **Outreach Prompt:**

"Hello [Name], I'm reaching out because we have a space that aligns with your focus on [specific need], and I'd love to invite you in for a complimentary day pass..."



**Outreach Prompt:**

“Hi [Name], I came across your recent project on [topic]. We host monthly events that might be a great fit for you and your team. Would you like to learn more?”

## 5. Follow Up Thoughtfully

Many prospects need more than one touchpoint before committing. Follow up with value - share relevant content, invite them to events, or check in with helpful tips. Keep communication consistent but respectful.

**Outreach Prompt:**

“Hi [Name], just wanted to check in. Did you have any questions after our last chat or tour? I’m happy to help!”

**Outreach Prompt:**

“Hello [Name], we’re hosting a workshop on [topic] next week that might interest you. I’d like to extend an invite. Are you available?”

**Outreach Prompt:**

“Hi [Name], I found this article/resource on [topic] and thought you’d find it useful given your interest in [specific need]. Give me a call if you find it interesting.”



Most industries have seasonality. Be respectful of your contacts and reach out in consideration of their busy months. Be mindful of holidays and vacation season too.

## 6. Track & Refine Your Efforts

Use a CRM tool to meticulously track all your leads, conversations, tasks, and outcomes. Keeping detailed records helps you stay organized, assign tasks to team members, prioritize high-potential prospects, and tailor your outreach to each individual's needs. Over time, reviewing your CRM data will reveal patterns and insights that allow you to refine your prospecting strategies for better results and greater efficiency.

### CRM Entry Checklist:

- ☐ Full Name: \_\_\_\_\_
- ☐ Company Name: \_\_\_\_\_
- ☐ Email Address: \_\_\_\_\_
- ☐ Phone Number: \_\_\_\_\_
- ☐ Role/Title: \_\_\_\_\_
- ☐ Source of Lead: \_\_\_\_\_
- ☐ Notes on interests/needs: \_\_\_\_\_
- ☐ Follow-up Dates & Tasks: \_\_\_\_\_

Prospecting is both an art and a science. It requires a balance of thoughtful preparation, genuine connection, and disciplined follow-up. By defining your ideal members, targeting your outreach, and consistently tracking your efforts, you build a pipeline of qualified prospects ready to join and enrich your community. Use these tools and strategies as your guide, and watch your coworking space thrive with loyal members.



**BONUS ITEM:** Lead Inquiry Sheet (worksheet on pg. 52)

# CHAPTER 3

# THE ART OF

# THE TOUR

---





## The Art of the Tour

The tour is more than just showing someone around your space. It's your chance to sell the experience, the value, and the lifestyle of being part of your community.

From the very first handshake to the follow-up email, every step is an opportunity to build trust and excitement. A great tour balances professionalism with warmth, information with storytelling, and structure with flexibility.

This chapter will guide you through the art of the tour - the preparation, delivery, and follow-up - so that every prospect walks away feeling informed, impressed, and ready to take the next step.

The **Art of the Tour** isn't just about following a script. It's a carefully crafted experience that connects your prospect's needs with your space's unique benefits. Mastering the art of the tour means listening, adapting and turning every step into an opportunity to convert.



## 1. First Impressions Matter

Your greeting sets the tone for the entire tour. Make eye contact, smile, and address them by name. Your goal is to create a welcoming environment right from the start.

### **First Impressions Checklist:**

- ☐ Greet with a smile and handshake
- ☐ Use the prospect's name within the first minute
- ☐ Offer water, coffee or tea
- ☐ Ensure reception and shared space is clean
- ☐ Maintain confident, open body language

## 2. Know Before You Show

Preparation is key. Before the tour, review the prospect's details - company name, industry, reason for visiting, and any special needs or preferences they've shared. This will allow you to highlight the most relevant features and build a tailored experience.

- ☐ Review lead notes before arrival
- ☐ Prepare brochures, floor plan and proposal template
- ☐ Know current availability and pricing
- ☐ Confirm any reserved rooms for private discussion
- ☐ Clean and stage ideal private offices



**BONUS ITEM:** Tour Inquiry Sheet (worksheet on pg. 53)

### 3. Engage & Personalize

Ask questions as you walk to understand their needs, then tailor your pitch in real time. If they mention frequent client meetings, highlight your meeting spaces. If they're price-sensitive, talk about cost-effective membership options.

#### **Personalization Prompt:**

"What's most important to you in a workspace?"

#### **Personalization Prompt:**

"How often do you host clients or guests?"

#### **Personalization Prompt:**

"What amenities would make your workday easier?"

### 4. Handle Questions with Confidence

Questions are a sign of interest. Answer honestly, and if you don't know the answer, promise to follow up quickly. Keep answers concise and avoid jargon.

#### **Quick Response Framework:**

1. **Acknowledge** — "That's a great question."
2. **Answer** — Provide a clear, accurate response.
3. **Bridge** — Tie your answer back to a benefit of your space.
4. **Follow-up** — Note anything you'll send them later.




Connecting with your tour on a personal level can be a make or break moment. Take the time to show you care, and that they're more than just a number.

## 5. End Strong & Set the Next Step

End the tour by summarizing what you’ve discussed and presenting the next step - whether that’s a proposal, a trial day, or scheduling a follow-up call.

### Follow-up Checklist:

- ☐ Thank them for their time
- ☐ Confirm interest level & decision-making process
- ☐ Provide a formal proposal within 1-24 hours
- ☐ Add notes to your CRM immediately
- ☐ Schedule the next contact

 Pro Tip: Hand them a physical takeaway (brochure, one-pager, proposal) so they leave with a tangible reminder.

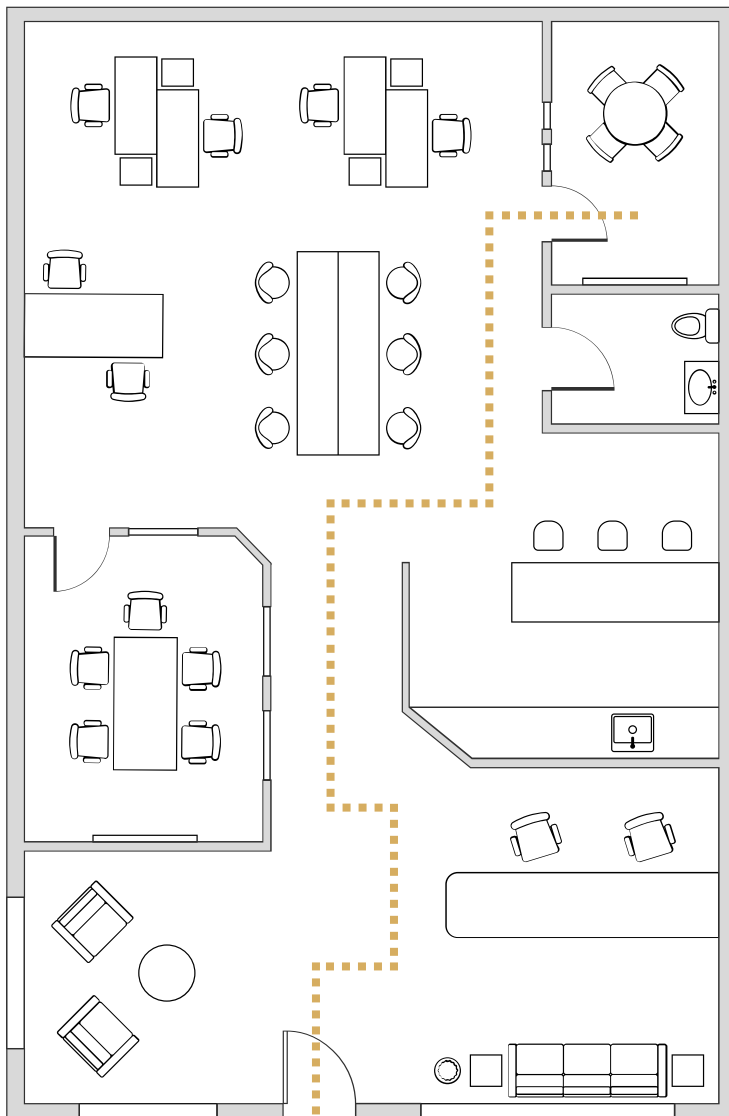
## 6. The Power of a Formal Proposal

The proposal is your written opportunity to seal the deal. It should recap their needs, outline your solution, clearly state pricing, and give them a reason to say “yes” now.

| Section   | What to Include                           |
|-----------|---|
| Summary   | Prospect’s stated needs & Goals           |
| Solution  | Your recommended membership or package    |
| Pricing   | Transparent breakdown with any promotions |
| Next Step | Clear call-to-action & decision timeline  |

## 7. Mapping Your Route

A well-planned tour route keeps the experience smooth and impactful. Start with your strongest features, move through the space in a logical flow, and end at a point that makes closing the conversation natural - like a lounge area or private office where you can review details. Avoid unnecessary backtracking and ensure you hit all key selling points.



### Recommendations:

- Begin at the front desk or lobby for introductions
- Lead with high-impact areas (Bright coworking space, unique amenities)
- Explain each membership as you enter it's dedicated space (community vs. desks vs. private offices)
- Integrate pauses for conversation in low-traffic, comfortable spots.
- Plan a closing location to discuss next steps
- Adjust your route for each prospect's interest



# CHAPTER 4

# CLOSING WITH CONFIDENCE

---





## Closing with Confidence

Closing a sale is more than just asking for a signature, it's about guiding the prospect to a confident "yes" without pressure. The best closers don't rely on luck. They have a process, read the room, and use techniques that match the prospect's needs and energy.

Confidence in closing comes from preparation. You've built rapport, identified pain points, and shown how your space solves their problems. Now, it's time to connect those dots and help them visualize themselves as a member of your community. This isn't the moment to get shy or backpedal - closing is simply the natural next step in a good conversation.



**Remember:** Prospects take cues from you. If you hesitate, they'll hesitate. If you are decisive and clear, they'll mirror your certainty. Closing with confidence is about knowing your value, asking clearly, and making it easy for the prospect to say "yes."

## 1. Set the Stage Early

The close starts at the beginning of the tour. Throughout the conversation, plant seeds that make the close feel natural. Mention limited availability, upcoming events, or popular features they've shown interest in. This creates momentum and builds urgency without pressure.



List 3 “seed statements” you can naturally drop into your tour to set up an easy close.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 2. Three Types of Closes

Different prospects respond to different approaches. Master these three types of closes so you can adapt in real time:

- **The Direct Close:** Clear and confident. “Based on what we’ve discussed, it sounds like this private office is the right fit. Would you like me to get the agreement started?”
- **The Assumptive Close:** Acts as if the decision is already made. “Great, let’s pick your start date. Would you prefer the 15th or the 1st?”
- **The Two-Option Close:** Gives two favorable options so the prospect stays in “yes” mode. “Would you like to start with the monthly plan or lock in the 12-month rate?”

### 3. Handle Objections with Curiosity

Objections aren't rejections. They're a request for more information. Stay calm, ask clarifying questions, and address concerns directly. Turn "I need to think about it" into "What specifically would you like to think about?"

#### **Objection Handling Checklist:**

- ☐ Listen without interrupting
- ☐ Repeat back their concern to confirm understanding
- ☐ Address their concern with facts and examples
- ☐ Reconfirm value before re-closing

#### **"I need to think about it"**

"Absolutely, I understand wanting to think things over. What's the main factor you'd like to consider? That way I can make sure you have all the information to make your decision confidently."

#### **"It's too expansive"**

"I hear you. Let's look at what's included and the value you'll get over time. Often, members find the benefits save them money in other areas like parking, amenities, meeting space, and flexibility."



Remember: An objection isn't a "no" - it's a request for more clarity. A confident closer listens without defensiveness, validates the concern, and offers a solution.



## 4. Create Urgency Without Pressure

Urgency helps prospects make decisions, but it must feel authentic. Share real-time availability, upcoming price changes, or incentives with honesty. The goal is to make acting now the logical choice.



List 2 current and truthful urgency drivers you can share during your tours:

1. \_\_\_\_\_
2. \_\_\_\_\_

## 5. Make the Next Step Effortless

Don't let excitement fade after the tour. Have agreements ready, know your deposit requirements, and streamline the sign-up process. The less friction, the higher the conversion.

### **Quick Action Plan:**

- ☐ Keep agreements pre-filled with your company details
- ☐ Offer multiple payment options
- ☐ Confirm next steps before they leave

Closing with confidence isn't about forcing a decision, it's about guiding the prospect to the natural next step. When you truly understand their needs and address concerns with care, you create a closing moment that feels like the right choice. Confidence comes from preparation and belief in what you're offering - and when you show that, your prospects will too.

# CHAPTER 5

# RUNNING A

# SMOOTH OPERATION

---



## Running a Smooth Operation

Running a coworking space isn't just about leasing desks, it's about creating an environment where members feel valued, supported, and eager to stay. Smooth, efficient operations behind the scenes make the difference between a one-time visit and long-term loyalty. From move-in to move-out, every touchpoint shapes the member's journey and impacts their overall experience.



This chapter will guide you through key operational practices that keep your space running like clockwork while fostering a community that members love. When your processes are seamless and your hospitality is intentional, you build trust, boost retention, and set your business apart in a competitive market.

## 1. Streamline Your Move-In Process

Make onboarding new members easy and welcoming. Have all paperwork ready, provide clear instructions, and offer a personalized orientation. A smooth start sets the tone for their entire membership.

### **Move-In Checklist:**

- ☐ Activated key card & office key(s)
- ☐ Wi-Fi, printer & other tech access granted
- ☐ Clean & refreshed office space
- ☐ New member welcome packet
- ☐ Coworking merch (mug, pens, etc.)

## 2. Maintain Consistent Communication

Regular check-ins and updates show members you care and keep them informed about events, changes, and opportunities. Use emails, newsletters, or an app to stay connected without overwhelming them.

### **Suggest Member Communication Methods:**

- ☐ Direct email communication
- ☐ Weekly housekeeping email
- ☐ Monthly community newsletter
- ☐ Slack Channel



**BONUS ITEM:** Move-In Checklist (checklist on pg. 54)



### 3. Keep Operations Efficient Behind the Scenes

Inventory management, cleaning schedules, and maintenance should be predictable and reliable. Use systems to track supplies, fix issues quickly, and prevent disruptions to member experience.

| Product         | In Stock | Date Ordered | Notes                    |
|-----------------|----------|--------------|--------------------------|
| Coffee Creamer  | Y        | Jun 21, 2025 |                          |
| Coffee Stirrers | Y        | May 3, 2025  |                          |
| Paper Towels    | Low      | May 18, 2025 | Increase order frequency |
| Printer Paper   | Y        | Feb 18, 2025 | Order 4x5 pages          |
| Printer Ink     | Y        | Jan 25, 2025 |                          |

### 4. Personalize the Member Experience

Remember names, preferences, and milestones. Celebrate birthdays, recognize achievements, and create moments that make members feel seen and appreciated. Members stay for the right culture and community.



List 2 ways you currently personalize your member experiences, plus 2 new ways to boost engagement.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## 5. Building Community Culture

Operations go beyond logistics. Cultivate a welcoming atmosphere with events, networking opportunities, and shared rituals. A strong community makes members feel at home and more likely to stay.



Write down 3 community-building activities or events you want to implement to build community culture.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 6. Providing Exceptional Hospitality

Hospitality is the heart of coworking success. However, sometimes things go wrong and your team needs to be prepared for this. Listen actively to member concerns, acknowledge their feelings, and respond promptly with solutions or compromises.

### **How to Handle Complaints:**

- ☐ Greet members warmly, even during peak times
- ☐ Listen fully before responding
- ☐ Apologize sincerely when issues arise
- ☐ Offer clear next steps or solutions
- ☐ Follow up to ensure resolution and member satisfaction



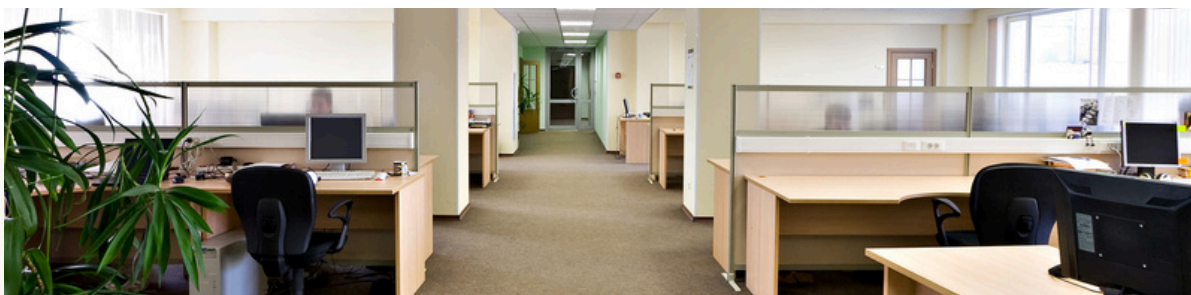
Customers aren't always right, but should always be treated with respect. Use conflicts as chances to teach and grow.

## 7. Handle Move-Outs with Care

Even departures are part of the journey. Make the exit process respectful and smooth, gather feedback to improve, and leave the door open for return or referrals. A positive last impression can turn a leaving member into a lifelong advocate.

### **Move-Out Checklist:**

- ☐ De-activate key card & collect office key(s)
- ☐ Revoke Wi-Fi, printer & other tech access
- ☐ Schedule repairs & office refresh
- ☐ Return security deposit on file
- ☐ Collect member survey & reviews



Running smooth operations and delivering exceptional hospitality are the foundations of a thriving coworking community. When every step is handled with care and intention, you create a space where members feel valued, supported, and excited to stay. Remember, great operations aren't just about systems - they're about people. Invest in both, and your space will flourish.



**BONUS ITEM:** Move-Out Checklist (checklist on pg. 56)

# CHAPTER 6

# MEMBER RETENTION & ENGAGEMENT

---







## Member Retention & Improved Engagement

Getting a new member in the door is only the first step. The real magic, and long-term profitability, happens when members stay, grow, and become advocates for your space.

**Member retention is about more than renewals;** it's about creating an environment where people feel valued, connected, and inspired to keep coming back.

Engagement is the fuel for that loyalty. When members are engaged, they're more likely to use the space, refer others, and speak positively about your community.

Retention doesn't happen by accident, it's the product of intentional actions, thoughtful programming, and consistent relationship building. From the first welcome email to the anniversary thank-you card, every touchpoint shapes the member's experience.

In this chapter, we'll walk through practical strategies for keeping your members engaged, connected, and loyal while turning your community into your biggest sales asset.



## 1. Build Relationships Beyond Transactions

Members don't just stay for the amenities, they stay for the people. Prioritize knowing your members by name, remembering details about their business, and taking an interest in their successes. Remember, personalization builds emotional connections that make it harder for members to leave.



Track member milestones and anniversaries in your CRM (like HubSpot). Set reminders to congratulate them, or send flowers and a gift for big events (work anniversaries, weddings, new babies, etc.). Small touches leave lasting impressions.

## 2. Build a Strong Onboarding Process

The first 90 days set the tone for the entire relationship. To start on the right note, provide a seamless onboarding experience - think welcome tours, publish a community announcement, give personalized introductions to other members, and a clear “how-to” guide for using amenities and booking resources.

### **Onboarding Checklist:**

- ☐ Day 1 welcome meeting/breakfast
- ☐ In-depth tour and member introductions
- ☐ Stage private office or desk with a welcome gift
- ☐ Publish a welcome post on LinkedIn, Instagram, etc.
- ☐ New member welcome packet (resource guide)
- ☐ Schedule follow-up check-in at 30, 60 and 90 days

### 3. Create Ongoing Community Engagement

Host a variety of events, from professional development workshops to casual social gatherings. Give members reasons to interact with each other, not just with your staff. Engagement creates a sense of belonging, which directly impacts retention.

| Member Event  | Benefits  |
|---------------|---|
| Breakfast     | Boosts engagement and member morale                 |
| Happy Hour    | Boosts personal connection and engagement           |
| Lunch-n-Learn | Networking and self-promotion wrapped in one        |
| Grab-n-Go     | Give away branded stress balls or highly used items |

### 4. Actively Collect Feedback

Regular feedback helps you catch issues early and adapt to member needs. Show that their opinions matter by actually implementing changes when possible.

**Different Ways to Collect Feedback:**

- ☐ Google Forms survey
- ☐ SurveyMonkey quarterly poll
- ☐ Beamer in-app announcements with polls
- ☐ One-on-one check-ins during community walks
- ☐ Monthly member roundtable lunch
- ☐ Comment box in common area

## 5. Offer Clear Upgrade Paths

Retention isn't just about keeping members where they are, it's about growing with them. Make sure members know the benefits of moving from a hot desk to a private office, or adding meeting room packages.



List 3 upgrade offers you can make to members this month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 6. Address Issues Promptly and Positively

Problems are inevitable, but the way you handle them can turn a frustrated member into your biggest advocate. Respond quickly and resolve the issue effectively.

### Member Complaint - Scenario:

A member is upset that a meeting room they booked was double-booked. What is your approach?

#### Option 1:

Say there's nothing you can do since the other meeting started, disagree with the member over who booked first and walk away to "let them figure it out."

**✗ Wrong Way**

#### Option 2:

Apologize sincerely, find an immediate alternative (another private room) and log the issue to prevent repeat mistakes. If the member is still upset, offer a complimentary perk.

**✓ Right Way**

# CHAPTER 7

# MANAGING

# CHALLENGES

---





## Managing Challenges - And Winning Them Over

No matter how polished your operations or how charming your sales pitch, challenges are inevitable. They may show up as a sales slump, a high-maintenance member, a technical hiccup, or a sudden shift in market trends. The real measure of a high-functioning team isn't how they perform when everything's going smoothly, it's how they respond when things get messy.



Managing challenges is both an art and a discipline. It requires resilience, quick thinking, and the ability to keep your cool when tensions rise. The key is to approach problems as opportunities - to refine your systems, strengthen relationships, and showcase your team's professionalism. In this chapter, we'll cover strategies for overcoming obstacles in both sales and operations so your team can handle the unexpected with confidence.



## 1. Anticipate Challenges Before They Happen

Prevention is your first line of defense. Map out potential pain points for both sales and operations - like seasonal dips in new inquiries, common onboarding hiccups, or recurring maintenance issues - and create contingency plans for each.

Having clear processes in place ensures your team can respond quickly and effectively. To do so, keep an **Operations Manual** onsite with the below included:

- ☐ Up-to-date Standard Operating Procedures (SOPs)
- ☐ Troubleshooting guides for Wi-Fi, printers, meeting room cameras, and other tech
- ☐ Membership benefits, house rules and restrictions
- ☐ Quick-reference contact list for vendors
- ☐ Escalation process for urgent issues

## 2. Master Difficult Conversations with Members

Not all members will be easy to manage. Some may be overly demanding, others may be slow to pay, and a few may challenge your rules. The key is to listen first, validate their concerns, and then present clear solutions without escalating tension.



Pro Tip: Always follow up in writing after a challenging conversation to confirm next steps, document the conversation and avoid misunderstandings.

### 3. Stay Solution-Oriented in Sales Slumps

When leads slow down, resist the urge to panic. Instead, analyze your data - where are leads dropping off in the pipeline? Which of your digital marketing or outreach campaigns are underperforming? Then, adapt quickly.



Fill out the following table with three low-cost, high-impact actions your team can take during slow periods (e.g., targeted LinkedIn outreach, limited time promotions, etc.)

| Low-Cost Action | Who's Responsible | Target Date |
|-----------------|-------------------|-------------|
|                 |                   |             |
|                 |                   |             |
|                 |                   |             |

### 4. Watch the Numbers

Slow sales happen, but the data will tell you why. Track performance metrics regularly so you can identify issues early and adjust strategy.

**Sales Data to Monitor:**

- ☐ Churn rate (member cancellations)
- ☐ Lead-to-tour conversion rate
- ☐ Tour-to-close conversion rate
- ☐ Average time from lead to close
- ☐ Number of follow-ups per lead
- ☐ Seasonality patterns affecting leads
- ☐ Number of inbound leads per week/month

## 5. Protect and Lift Team Morale

Your team looks to you for guidance, especially when things get tough. Maintaining morale is critical for productivity and retention. An unhappy team leads to unhappy members, so don't forget the people within.

### ✓ **Raise Morale By:**

- ☐ Recognizing wins (even small ones)
- ☐ Offering extra support during high-stress times
- ☐ Being approachable and open to feedback
- ☐ Providing learning opportunities
- ☐ Celebrating team milestones

### ✗ **Avoid Lowering Morale By:**

- ☐ Ignoring team concerns
- ☐ Only giving feedback when something goes wrong
- ☐ Micromanaging during stressful periods
- ☐ Failing to acknowledge the team's hard work

Challenges in coworking and hospitality aren't roadblocks, they're opportunities to show leadership, strengthen your team, and build trust with members. By preparing ahead of time, staying data-driven, and protecting team morale, you create a culture that thrives under pressure rather than crumbles.

The best operators aren't defined by how they perform on a good day, they're remembered for how they handle the bad ones.

# CHAPTER 8

# MEASURING SUCCESS & IMPROVEMENT

---



## Measuring Success & Continuous Improvement

You can't improve what you don't measure. In the fast-paced world of coworking, keeping a close eye on your business's performance is key to staying relevant, remaining competitive, increasing profits, and delivering an exceptional member experience.

Measuring your success goes beyond simply tracking numbers. Your team needs to understand what those key metrics mean, how to spot

trends, and how to make informed decisions based on that data.

This chapter will guide you through defining the right metrics for your space, using the best tools to gather data efficiently, and analyzing those insights to spot both opportunities and areas for improvement. You'll learn how to turn raw data into actionable plans that keep your business evolving.





## 1. Define Clear, Relevant KPIs

Success looks different for every coworking space, so start by defining your key performance indicators (KPIs). These could include metrics like member acquisition rate, average occupancy, revenue per available seat, or member satisfaction scores. Focus on what aligns with your business goals and tells a story about your performance.



Write down 3 KPIs you want to prioritize this quarter and why they matter to your space.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 2. Use Tools and Systems

Use the right technology to gather accurate data and save time on manual tracking. Here's a table of recommended platforms and what they're best used for:

| Tool Type        | Platform Ex.                | Best Use Case  |
|------------------|-----------------------------|--|
| CRM              | HubSpot, Salesforce         | Manage leads, track sales pipeline, automate outreach    |
| Booking Platform | LiquidSpace, Deskpass       | Manage space reservations, availability, billing         |
| Virtual Mail     | Spheremail, Anytime Mailbox | Manage virtual mail clients, CMRA compliance and records |

### 3. Analyze Trends, Not Just Numbers

Watch for larger patterns within the coworking industry that reveal what's really influencing your data. Keeping an eye on popular coworking trends enables your team to act proactively, rather than reactively.

#### **Trend Monitoring Checklist:**

- ☐ Hybrid Work Models: 74% of employees want flexible work
- ☐ Flexible Memberships: Short-term and pay-as-you-go plans are growing in popularity.
- ☐ Increased Competition: More local coworking options means differentiation is critical.
- ☐ Tech Integration: Seamless tech is becoming a necessity

### 4. Turn Data into Actionable Plans

Once you understand the data, create clear steps to improve. Use the SMART framework to set goals that are specific, measurable, achievable, relevant, and time-bound.

#### **Sample Action Plan:**

- ☐ Goal - Increase member retention by 10%
- ☐ Action Item 1. - Launch monthly feedback surveys
- ☐ Action Item 2. - Implement loyalty perks
- ☐ Action Item 3. - Implement member promotions
- ☐ Action Item 4. - Train staff on member engagement
- ☐ Deadline - 3 months from now

## 5. Foster a Culture of Continuous Improvement

Encourage your team to see measurement and feedback as tools for growth, not criticism. Celebrate wins, learn from setbacks, and keep iterating on processes. Regular team check-ins focused on data and goals help maintain momentum and accountability.

### **Ways to Encourage Improvement:**

- ☐ Hold monthly team meetings focused on KPIs and progress
- ☐ Celebrate wins and share lessons learned openly
- ☐ Encourage team members to suggest process improvements
- ☐ Provide regular training on data tools and interpretation
- ☐ Set up anonymous feedback channels for staff and members
- ☐ Review and update SOPs quarterly based on insights

## 6. Reflect and Plan Forward

Taking time to reflect on your data empowers you to make confident strategic decisions. Regular reflection helps you connect numbers to real-world impact, giving clarity on what truly drives success



Based on your recent performance data and trends, write a brief reflection answering: Where do you see the biggest opportunities for improvement?

---

---

---



# YOUR INVESTMENT



Laura Green  
Founder/Owner



Nina Quiles  
Brand Manager

## **Thank You for Purchasing This Kit!**

We're so glad you chose to invest in your team with EleVault! We hope this guide brought you clarity and practical tools to help you empower your sales and operations. If you have any questions or want to work with us directly, don't hesitate to reach out. **Looking for more?** Explore our other downloadable kits or inquire about hands-on support. We'd love to help you grow.



[info@getelevault.com](mailto:info@getelevault.com)

[www.getelevault.com](http://www.getelevault.com)



# BONUS TEMPLATE SUITE & WORKSHEETS

---







## Additional Worksheets

From organizing leads to ensuring a smooth move-in experience, these extra resources are designed to make daily operations easier and more efficient. Inside, you'll find tools like lead tracking sheets, move-in checklists, and other practical templates to keep processes streamlined and consistent.

Each worksheet can be printed for repeated use, giving your team ready-to-go materials that support both sales and member experience. Whether you're a seasoned manager or just stepping into your role, these worksheets give you a solid foundation to work from and improve internal processing.

### What You'll Need

- ✓ A Laptop or Tablet
- ✓ Notebook and Pen
- ✓ Time investment: 30-60 minutes

## Opening Checklist

- ☐ Unlock front doors and turn on lights
- ☐ Turn on ambient music (if applicable)
- ☐ Brew coffee and set out ice water in café
- ☐ Empty dishwasher and replace with dirty dishes
- ☐ Clean café and restock missing amenities (creamers, tea, etc.)
- ☐ Check email for morning reservations, day passes, etc.
- ☐ If morning meetings are scheduled, clean and prep the rooms
- ☐ Clean and prep community spaces (tuck in chairs, clean table tops and counters, etc.)
- ☐ Walk through space and spot clean (return trash cans to offices, push in chairs, etc.)
- ☐ Check business center and restock supplies
- ☐ Clean off front desk and remove clutter
- ☐ Check email for important/urgent emails
- ☐ Check office phone and respond to voicemails (if applicable)
- ☐ Collect mail, sort and deliver

### Notes:

---

---

---

# Ideal Client Profile Worksheet

| Category                | Description Example |
|-------------------------|---------------------|
| Industry or Niche       |                     |
| Budget Range            |                     |
| Decision Maker Title    |                     |
| Decision-Making Factors |                     |
| Location                |                     |
| Pain Point You Solve    |                     |
| Common Objections       |                     |
| Where They Hang Out     |                     |
| Values or Priorities    |                     |
|                         |                     |
|                         |                     |
|                         |                     |
|                         |                     |
|                         |                     |
|                         |                     |



Fill in your ideal client profile and use this will shape your content, messaging, and lead sources moving forward.

# General Lead Inquiry Sheet

Contact Name: \_\_\_\_\_

Company/Industry: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Membership Type Interested In:

☐ \_\_\_\_\_

☐ \_\_\_\_\_

☐ \_\_\_\_\_

☐ \_\_\_\_\_

Number of Guests/Team Size: \_\_\_\_\_

Start Date: \_\_\_\_\_

How Did You Hear About Us?: \_\_\_\_\_

Budget (if provided): \_\_\_\_\_

Schedule a Tour Y / N - Date: \_\_\_\_\_

Additional Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Tour Inquiry Sheet

Contact Name: \_\_\_\_\_

Company/Industry: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Product(s) of Interest:

☐ \_\_\_\_\_

☐ \_\_\_\_\_

☐ \_\_\_\_\_

☐ \_\_\_\_\_

Tour Date & Time: \_\_\_\_\_

Start Date: \_\_\_\_\_

How Did You Hear About Us?: \_\_\_\_\_

\_\_\_\_\_

Budget (if provided): \_\_\_\_\_

Additional Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Move-In Checklist

|                      |  |
|----------------------|--|
| Main Contact         |  |
| Main Contact Email   |  |
| Main Contact Phone # |  |
| Main Contact Address |  |

|                         |  |
|-------------------------|--|
| Company Name            |  |
| Company Kube ID #       |  |
| Company Billing Address |  |
| Billing Contact         |  |

|                           |  |
|---------------------------|--|
| Membership Type           |  |
| Private Office /Desk #    |  |
| Contact Term Length       |  |
| Contract Monthly Rate     |  |
| Security Retainer on File |  |
| Move-in Date              |  |
| Renewal Date              |  |

| Members (First, Last) | # of Keys Provided | Fob # |
|-----------------------|--------------------|-------|
|                       |                    |       |
|                       |                    |       |

# Move-In Checklist

| To Do  | Completed |
|--|-----------|
| Welcome email sent                                   |           |
| Keys and fobs activated and ready for pick up        |           |
| Security deposit collected                           |           |
| Office clean and refreshed                           |           |
| 1583 form signed and received                        |           |
| Account created in Yardi Kube                        |           |
| Wi-Fi access granted                                 |           |
| Printer access granted                               |           |
| Tour of workspace and property                       |           |
| Gym waiver collected (if applicable)                 |           |
| Welcome gift left in office                          |           |
| Logo ordered and/or placed on door                   |           |
| Connect with new member on LinkedIn                  |           |
| New member announcement (newsletter, LinkedIn, etc.) |           |
| New member listed on office directoy                 |           |

**Notes:**

---

---

---

# Move-Out Checklist

|                      |  |
|----------------------|--|
| Main Contact         |  |
| Main Contact Email   |  |
| Main Contact Phone # |  |
| Main Contact Address |  |

|                         |  |
|-------------------------|--|
| Company Name            |  |
| Company Kube ID #       |  |
| Company Billing Address |  |
| Billing Contact         |  |

|                           |  |
|---------------------------|--|
| Membership Type           |  |
| Private Office /Desk #    |  |
| Contact Term Length       |  |
| Contract Monthly Rate     |  |
| Security Retainer on File |  |
| Move-out Date             |  |

| Members (First, Last) | # of Keys Provided | Fob # |
|-----------------------|--------------------|-------|
|                       |                    |       |
|                       |                    |       |
|                       |                    |       |

# Move-Out Checklist

| Item                       | Condition | Notes |
|----------------------------|-----------|-------|
| Frosting on windows intact |           |       |
| Windows undamaged          |           |       |
| Doors function properly    |           |       |
| Blinds function properly   |           |       |
| Carpets undamaged          |           |       |
| Walls undamaged            |           |       |
| Furniture intact           |           |       |
| Light fixtures function    |           |       |
|                            |           |       |
|                            |           |       |

| Type of Repair | Vendor | Total Cost |
|----------------|--------|------------|
|                |        |            |
|                |        |            |
|                |        |            |

|                              |  |
|------------------------------|--|
| Total Cost of Repairs        |  |
| Remaining Retainer on File   |  |
| Mailing Address for Retainer |  |

# WorkSpace Audit

| Area                | Current State | Areas of Improvement |
|---------------------|---------------|----------------------|
| Entrance            |               |                      |
| Reception/Welcome   |               |                      |
| Common Areas        |               |                      |
| Conference Rooms    |               |                      |
| Kitchen/Café        |               |                      |
| Bathrooms           |               |                      |
| Lighting & Ambiance |               |                      |
| Signage & Branding  |               |                      |
| Business Center     |               |                      |
|                     |               |                      |
|                     |               |                      |
|                     |               |                      |
|                     |               |                      |
|                     |               |                      |
|                     |               |                      |



Fill in the empty rows with areas specific to your workspace, plus your specific conditions and recommended improvements.