

COWORKING SPACE

PHONE CALL + FACILITY TOUR

INSTRUCTIONS

QUESTIONNAIRE

While role-playing as someone who is interested in a flexible coworking space, call to make an appointment to tour an office, then go to the location to assess the space as well as the associate's knowledge and prospect engagement skills. Photos are required.



Before You Begin

- Review your shop confirmation
- Know your reason for calling/visiting
- Call during business hours
- Have a device to record wait times



Don't Forget!

- Arrive at the appointment time
- Ask knowledge question
- Take required photos
- Get a business card



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Check your shop confirmation for the phone number to call to schedule your office tour.
- Request to see the space and schedule an appointment to visit the assigned location.
- Visit the space (alone). Expect to be at the location for 20-30 minutes.
- Get the names of the associates you speak with by phone and on-site.
- Get a business card (or brochure if no business cards) to upload with your report.
- Do not fill out an application or agreement while on-site. If asked, say you'd like to think about your options and will reach out to the associate if you decide to move forward.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop.
- You or your immediate family members cannot have ever worked for United Franchise Group, Vast Coworking or Intelligent Office.



Shop Instructions

Step #1: Prepare for the shop by knowing your scenario and background information

- Be prepared to explain what you do for work and why you are interested in obtaining an office at the facility. Do not reveal at any time that you are a mystery shopper.
- Be prepared to provide the following detail when asked:
 - ✓ If you've worked from home/remotely in the past or have worked in other coworking or in-office environments
 - ✓ Why you need an office

- ✓ What you do for a living and a few personal and specific details about your work
 - i. For example, a local real estate agent needing space to grow a small team, a freelance writer mostly submitting feature articles for national magazines, a solo accountant needing space to meet clients for the upcoming tax season, an event organizer mostly working with weddings and local venues, etc.
- ✓ How often would you be coming in
- ✓ If you take a lot of phone calls/need phone answering services
- ✓ If privacy is important to you vs. sharing a space (do you prefer a quiet environment, or are you energized by people)
- ✓ If you would be seeing clients in your office or have team or client meetings
- ✓ If you receive a lot of mail or need to receive notifications about mail when out of office

Step #2: Call to inquire about available space and schedule a tour

- Call the phone number listed in your shop confirmation between 9am-5pm Mon-Fri.
 - If no one answers or you get voicemail, hang up without leaving a message. Call again during business hours (calls must be 1-2 hours apart).
 - If no one answers on the second attempt, leave a message with your name and phone number and indicate that you are interested in learning more about office space availability and amenities.
 - Wait 2 full business days (48 hours) for someone to return your call. Promptly return any missed call-backs.
 - If you have not been called back after 2 full business days, call again during business hours (third attempt).
 - If you are still unable to speak with an associate after waiting 2 full business days and making 3 call attempts, submit your report as unsuccessful.
- When you speak with an associate, express interest in a coworking space.
- Wait for the associate to offer to schedule an on-site visit appointment.
 - If they do not offer an appointment, request an appointment to tour the office.
- Request an appointment within 1-2 days, or accept the next available appointment date.
 - Before you request a specific date, find out the first available date.
 - If you're told to just walk in (no appt needed), visit within 1-2 days during business hours.
- Get the name of the associate. Ask for their name if not provided.

Step #3: Arrive at the scheduled appointment time, ask required question, and take photos

- Observe the exterior and the interior of the office when you arrive.
- Let the associate ask any questions they feel are necessary. Do not rush the interaction.
- Get the associate's name and full physical description (gender, hair color, height, age).
- When the associate offers to take you on a tour, accept and make note of the condition of the property, including the amenities and offices.
 - If the associate doesn't offer a tour, ask to see the space. Do not leave without a tour.
- **Required question:** Ask one of the following questions during the on-site visit:

- Are you affiliated with other facilities I would be able to access when travelling?
 - What hours is the space available to me?
 - Do I have to pay to use one of the conference rooms?
 - What type of networking or community events are available?
 - Is someone available on staff to assist with any tech/equipment questions or issues?
 - Do you offer any discounts, or are there any current promotions?
 - Are mailboxes available with an address I can use for incoming mail?
 - May I bring guests with me to the office?
 - If I leave my laptop here overnight, will it be secure, or will I need to take it home?
- **Required photos:** Take at least 2 clear photos of the coworking space inside the building.
 - Take wide-view photos that capture what the coworking space looks like.
 - You can let the associate know you need to take photos to show a coworker, executive, or partner the space for a final decision.
 - Avoid capturing employees in the photos, and focus on the areas you were shown.
 - If there is anything that stands out as particularly good or in need of improvement, try to capture that in the photos.
- **Required documentation:** Accept any printed materials you're offered (floor plan, price estimates, service list, etc.) to upload with your report.
 - Ask for the associate's business card. If they do not have one, ask for a brochure.
- After speaking with the associate about your needs, thank them for their time, say you will think about the options available, and you will be in touch should you decide to move forward.
 - Ask for their name, if not provided by this point.
- If unable to meet with an associate on-site when you arrive, you may leave, and submit your report as unsuccessful. Upload any relevant documentation with your report (e.g., if the office is closed during business hours, take a photo of the 'closed' sign).



QUESTIONNAIRE

Shop date:

Start time:

End time:

Phone Inquiry

1. What date/time did you call the location?

Refers to the first call you made. Example format: 10/1/2024 1:15 PM

2. Was your call answered by a live person within 1-2 rings?

☐ Yes

☐ No, more than 3 rings

☐ No, 3 rings

☐ Call not answered at all

3. If answered, did the person you spoke with collect your information?

☐ Yes

☐ Call not answered at all

☐ No

4. Did the person you spoke with indicate they would have an associate call you back?

☐ Yes

☐ Call not answered at all

☐ No

5. If yes, did you receive a call back from an associate?

☐ Yes

☐ I was not told an associate would call back

☐ No

☐ Call not answered at all

6. How long did it take for you to receive a return call?

Refers to the first call back you received, even if you missed it. Enter N/A if you did not leave voicemail or the person you first spoke with attempted to assist you without a call back from an associate.

7. Did the associate thank you for calling, state the name of the company, and ask how they could help you?

☐ Yes

☐ N/A – called back after leaving voicemail

☐ No

☐ N/A – unable to complete the call

8. Rate how polite and professional the associate sounded:

5 = Extremely polite and professional; 1 = Not at all polite and professional

☐ 5

☐ 2

☐ 4

☐ 1

☐ 3

☐ N/A – unable to complete the call

9. Explain your rating:

10. What questions did the associate ask to determine your needs?

Select all that apply. Phrasing does not have to exactly match. If nothing was asked, select 'Other' and explain.

☐ Where does your business operate from currently?

☐ Why are you thinking of making a change/move?

☐ What are your current challenges?

☐ When do you anticipate making this change?
☐ Besides yourself, are there any others involved in the decision making?

☐ What kind of budget do you have in mind?
☐ Other
☐ N/A – unable to complete the call

11. If other, list the questions:

12. What did the associate tell you about the coworking space during the call?

13. When was the first available appointment?

Refers to the first date available regardless of your availability. Count only business days (Mon-Fri) and not Sat/Sun. Select 'No appts available' if you were told they do not provide tours, have no office space available, etc.

☐ Same day
☐ Next business day
☐ Within 2 business days
☐ 3+ business days

☐ Told to just walk in anytime (no appointment necessary)
☐ No appointments available
☐ N/A – unable to complete the call

14. Name of the associate you spoke to:

Enter the name of the associate you spoke to about your needs and the space (either when you initially called or when you were called back after leaving a message).

Tour and Sales Approach

15. What date/time did you arrive at the location?

Example format: 10/2/2024 11:35 AM

16. Were any associates at the reception desk/hospitality bar when you arrived?

☐ Yes
☐ No
☐ N/A – unable to complete the shop

17. If not, how long did you wait until someone arrived to assist you?

☐ Less than a minute
☐ 1-2 minutes
☐ 2:01 – 3 minutes
☐ 3:01 – 4 minutes
☐ 4:01 – 5 minutes
☐ More than 5 minutes
☐ N/A – associate was at desk/bar
☐ N/A – unable to complete the shop

18. Did the associate smile, stand (if they were sitting), greet you by name, and offer a beverage?

☐ Yes
☐ No
☐ N/A – unable to complete the shop

19. If not, please explain:

20. List any probing questions the associate asked to determine your specific needs for a coworking space:

21. What did you say your needs were for a coworking space exactly?

22. Did the associate listen to your needs and customize the presentation and the tour to suit your preferences?

☐ Yes
☐ No
☐ N/A – unable to complete the shop

23. Explain how the associate tailored the presentation and tour to your specific needs:

If the presentation or tour was not customized, describe what you were told and shown and how it did not meet the needs you presented.

24. What services, features, amenities, or next-level upgrades were mentioned?

Select all that apply. If nothing was mentioned, select 'Other' and explain.

- | | |
|---|--|
| ☐ Fast/reliable internet | ☐ Meeting/conference rooms |
| ☐ Unlimited gourmet coffee, tea, and snacks | ☐ Cafe/lounges |
| ☐ Free parking | ☐ Phone booths |
| ☐ 24/7 key card access | ☐ Cleaning services |
| ☐ Networking, educational, or community events | ☐ Tech/IT support |
| ☐ Mailing/mail forwarding/shipping service | ☐ Lobby listing |
| ☐ Copy/print services | ☐ Discounts/promotions |
| ☐ Premium furniture | ☐ Other |
| | ☐ N/A – unable to complete the shop |

25. If other, list what was mentioned:

26. Which membership type was recommended for your needs?

- | | |
|---|--|
| ☐ Community Membership | ☐ Virtual Office |
| ☐ Dedicated/Permanent Desk | ☐ N/A – no membership suggested |
| ☐ Shared Desk | ☐ N/A – unable to complete the shop |
| ☐ Private Office | |

27. Did the associate clearly explain the pricing options?

- | | |
|------------------------------|--|
| ☐ Yes | ☐ N/A – unable to complete the shop |
| ☐ No | |

28. If any stipulations were mentioned, what exactly did the associate say?

Enter N/A if no stipulations were mentioned (related to pricing or otherwise).

29. If you presented any objections, did the associate attempt to overcome them?

- | | |
|------------------------------|---|
| ☐ Yes | ☐ N/A – did not present an objection |
| ☐ No | ☐ N/A – unable to complete the shop |

30. If you presented any concerns, explain what you said and how the associate responded:

31. Did the associate attempt to close the sale by asking for your business?

- | | |
|--|---|
| ☐ Yes | ☐ No, didn't try to close the deal or offer to follow up |
| ☐ No, didn't try to close the deal but asked to follow up | ☐ N/A – unable to complete the shop |

32. Which of the following documents were provided to take with you?

Select all that apply. If nothing was provided, select 'Other' and explain. Upload an image showing each document received.

- | | |
|--|--|
| ☐ List of optional services | ☐ Other nearby amenities |
| ☐ Pricing estimate/cost options | ☐ Business card |
| ☐ Membership/service agreement | ☐ Other |
| ☐ Floor plan | ☐ N/A – unable to complete the shop |

33. If other, please explain:

34. How knowledgeable was the associate?*5 = Extremely knowledgeable; 1 = Not at all knowledgeable*

- | | |
|----------------------------|--|
| ☐ 5 | ☐ 2 |
| ☐ 4 | ☐ 1 |
| ☐ 3 | ☐ N/A – unable to complete the shop |

35. Explain your rating:*Include specific examples (what you asked, how the associate responded, etc.).***36. Did the associate comment on any competitors?**

- | | |
|--|--|
| ☐ Yes, comments were generally positive | ☐ No |
| ☐ Yes, comments were generally negative | ☐ N/A – unable to complete the shop |

37. If so, what did the associate say about competitor coworking spaces?**38. Did the associate thank you or show appreciation for your visit?**

- | | |
|------------------------------|--|
| ☐ Yes | ☐ N/A – unable to complete the shop |
| ☐ No | |

39. Name of associate who assisted you:**40. Description of associate who assisted you:***Include gender, hair color/length, approximate height, and approximate age.***The Space****41. Rate the cleanliness, physical condition, and ambience of the building and interior:**

- 5 = Most favorable; 1 = Least favorable. Upload photos of interior taken on-site.*
- Coworking spaces should provide a beautiful, engaging, and modern environment while also being functional.*
- The exterior and interior should be clean, well lit, stocked, professional, and welcoming.*
- Consider the following areas (if present) in your rating: Reception/hospitality bar, cafe and lounges, shared/dedicated desk areas, private offices, meeting rooms, restrooms, etc.*

- | | |
|----------------------------|--|
| ☐ 5 | ☐ 2 |
| ☐ 4 | ☐ 1 |
| ☐ 3 | ☐ N/A – unable to complete the shop |

42. If less than 5, please explain:*Identify the areas that did not look professional, clean, stocked, organized, etc. and explain why you felt that way.***43. Was the space conducive to being productive with adequate private/quiet areas in addition to social/networking space?**

- | | |
|------------------------------|--|
| ☐ Yes | ☐ N/A – unable to complete the shop |
| ☐ No | |

Overall Experience**44. Based on this experience, how likely are you to recommend this coworking space to someone you know?***10 = Extremely likely; 0 = Not at all likely*

- | | |
|-----------------------------|----------------------------|
| ☐ 10 | ☐ 6 |
| ☐ 9 | ☐ 5 |
| ☐ 8 | ☐ 4 |
| ☐ 7 | ☐ 3 |

☐ 2☐ 1☐ 0☐ N/A – unable to complete the shop**45. Explain your rating:**

Provide details on why you would enjoy working in the space you toured or what could have improved the experience.

46. If you were unable to complete the shop, explain what happened:

If unable to speak to someone on the phone, include the date/time and outcome of all call attempts. If unable to complete the shop upon arrival, upload any relevant documentation (e.g., a photo of a sign indicating the office was closed).

END OF QUESTIONNAIRE