2018

COWORKING TECH AND TOOLS GUIDE

OUR LIST:

Shared workspaces of any size need to leverage tools to market the space, create operational efficiencies and to provide a competitive member experience.

This is a list of coworking tools and service providers compiled in 2018, many of which specialize in shared workspace, to help you either get started or to do a review of your current providers and make sure you're taking advantage of the latest market entrants.

WHAT DOES A TECH STACK LOOK LIKE FOR A COWORKING SPACE?

In 2018, there are still shared workspaces that are smaller and more boot-strapped, and those that are utilizing the Internet of Things to customize the member experience.

Wherever you fall in that spectrum, you will want to utilize at least some technology to automate your standard tasks and to enhance the member experience.

If you're just starting out, here's a a list of areas where you can engage technology to make life easier for you and your members:

TECH TOOL "BUCKETS"

Marketing (attract and convert members)

- Website
- CRM
- Email Marketing
- Social Media
- Google my Business Listing

Member Management (payments, access, reservations, on-boarding)

- Payment processing system (front end and back)
- Member agreements
- Conference room reservations
- Member communication

Other Space Tech Needs

- Printing software
- Space security

Internet Tech

- Internet service provider
- WiFi Access points
- WiFi dashboard
- Internet switch
- WiFi Security

General Business Tools

- Accounting Software
- Team/internal communication
- Team project management
- Connecting the dots/automation

SERVICE PROVIDER "BUCKETS"

- Lead-gen partners for virtual offices, conference rooms and memberships
- SEO
- Content Marketing

MARKETING TOOLS (ATTRACT AND CONVERT MEMBERS)

- Website platform
- Website hosting
- Online tour booking
- CRM
- Email Marketing
- Social Media
- Google my Business Listing

WEBSITE PLATFORM

Your website is your #1 tool to get prospects in the door for a tour. You owe it the proper investment.

The most common platforms on which to build your site include:

Wordpress: very flexible, lots of plug-ins, integrates with just about any web tool. Plan to spend $5k for an entry-level, professionally designed and developed site to support your business.

Squarespace: For the DIY'er...but you can also get a professional version built on the developer version of Squarespace.

Websites that come with your space management platform: Choose this option carefully. Will your SEO be impacted? Is it easy to add changes? Add blog posts? Book tours? Does the site use language that is standard in your market?

WEBSITE HOSTING

Choose a reputable hosting platform for your website. Options include HostGator, DreamHost, and others on this list.

MARKETING TOOLS (CONTINUED)

ONLINE TOUR BOOKING

Don't make prospective members use a contact form to book a tour with you. Give them instant access to your tour calendar with a simple integration to Calendly or Bookly

CRM

Your space management platform (next section in this doc) will likely have at least a basic CRM. But many of the space management platforms start the CRM process at the point of membership. You will want a CRM that also manages your prospects. There are many, many options to choose from and if you ask 20 different coworking space operators what they use, you will get 15 different answers. So spend a few hours reviewing three options and then pick one. The key is finding one that can be easily configured to match your workflow and then stick with it!!

Some options that coworking space operators use include:
- Nutshell
- Hubspot
- Zoho
- Salesforce (will require customization)

EMAIL MARKETING TOOLS

You host events, you give tours, you attract visitors to your website. Only a small percentage of those people will join your space at any given time. You want to capture their email addresses and include them in drip campaigns and regular content marketing emails.

- Email service provider such as MailChimp, Drip, Active Campaign
- Email capture form for your website - sometimes provided by the email service provider. Another good tool for this is Leadpages.
- Note: You will want to use email marketing to drive leads to content on your blog on your website - so content marketing is a core competency that you'll have to adopt or outsource (more on that below).

MARKETING TOOLS (CONTINUED)

SOCIAL MEDIA:

While free Facebook reach is at an all-time low, you must have a social media presence to drive leads to your website, to communicate your culture, promote your community, engage in your external community and for general credibility.

SET UP PROFILES ON:

- Facebook
- Twitter
- Instagram
- LinkedIn

TOOLS TO USE:

- A scheduling platform that will allow you to post to all of the platforms from one single platform. Examples include Hootsuite and Buffer
- MeetEdgar.com - a platform that allows you to post evergreen content without having to schedule it manually. A huge timesaver.

GOOGLE MY BUSINESS LISTING

I'm not sure this is a "tech tool" per se...but I really can't mention this enough so I'm including it here. It's almost as critical as your website, arguably more critical in some cases. Your Google My Business "GMB" listing is the search result that comes up when a potential member googles for coworking in a specific location and a listing of local businesses turns up in the search results. This is the same for mobile and desktop.

The reason it's so critical is that in many cases, your GMB listing will get 10x the traffic that your website gets. Sometimes 20X. It must be claimed and nurtured over time. Claim it here.

SPACE MANAGEMENT TOOLS

We will start here as this is the biggest tech decision you will make outside of your Internet access enablers.

As flexible workspace options proliferate, and the more experienced users have with a variety of spaces, the higher the bar will go for seamless, technology-supported onboarding, payment, and member communication.

Space management tools generally try to incorporate a broad range of functionality to support shared workspace operations.

MOST COVER THE FOLLOWING FUNCTIONALITY:

- Billing (monthly memberships and incremental charges for things like printing and meeting room use)
- CRM (these are often limited and support only from the point of membership)
- Member contact info
- Meeting room reservations
- Member communication (typically you still need to augment with a tool like Mailchimp)

SOME ALSO INCLUDE:

- WIFI access
- Phone management
- Door access
- Meeting room reservations

If you are a new operator, you probably want to select a system before opening so that you don't get stuck in the land of hacking together excel spreadsheets and running credit cards manually for longer than you intend.

SPACE MANAGEMENT TOOLS (CONTINUED)

I have ordered this list by those that I am most familiar with...which is biased by a) those that support and actively engage with the Global Workspace Association and

b) those that I most often hear operators in the GWA, the Everything Coworking Flight Groups, etc. say positive things about.

- Occupie by Essensys (GWA Member)
- KUBE by Yardi (GWA Member)
- Satellite Deskworks
- Office R&D
- Nexudus
- Cobot
- Smpl
- Proximity Spaces
- People Vine
- Optix

Note: No platform will be perfect. No platform will match your workflow 100%. Do not get stuck in analysis paralysis on this decision. Demo 3 options that fit most of your criteria and choose one.

SPACE MANAGEMENT A LA CARTE

The platforms above may handle some space management tasks really well and in some cases, you may want to augment with other tools or connect your core platform to additional tools. For example, if your core space management platform doesn't handle door access, you may want to integrate it with a door access tool such as KISI, Salto or Brivo.

A note on integrations:

If there's an integration on your wish list, reach out to your core space management platform vendor team and ask them if they can make it happen. The platforms are all so new that many of them will act on requests once they have a number of operators request them.

PAYMENT PROCESSORS

Your space management platform will have payment functionality that allows you to set up "plans" for your membership, conference room packages, day passes, etc. You will integrate it with a back-end payment processor such as Stripe or Authorize.net. You'll have to separately create an account with these processors and connect that account to your business bank account.

There are recurring payment systems that you can use outside of a space management platform such as Chargebee.

CONFERENCE ROOM RESERVATIONS

Your space management platform may handle your conference room reservations and some come with mobile-first and mobile-friendly apps for your members to use for meeting room reservations.

Another option that you can use is Liquidspace. If you are listed on their platform for external reservations, you can use the platform for your own members free of charge. A simple integration with your team's Google calendar and you are on your way.

SPACE MANAGEMENT A LA CARTE (CONTINUED)

MEMBER AGREEMENTS

Your space management platform will likely have a box that a new member checks to agree to your terms and conditions. You may choose to set up an integration with a platform such as:

Echosign
Docusign

The challenge with just letting a member check a box is that: a) you want the member to read it. b) you want the member to get a copy of it; c) you may need to customize it for enterprise clients; d) you may want to include member norms, have members initial key clauses, etc.

ENTRY/ACCESS CONTROL

Entry systems have gone through recent technological breakthroughs. The latest technology allows you to assign access remotely to a user's iPhone. Technology allows you to track how long a user is in the space if during unstaffed hours.

The keyless, smartphone access gives you, the operator, the flexibility to support off-hour deliveries and non-business hour conference room use which our meeting room brokers above will tell you is a big revenue opportunity.

PROVIDERS
- WUN - a Yardi Company (GWA Member)
- Salto/Clay
- Kisi
- Brivo

CLOUD PRINTING

ThinPrint Cloud Services (GWA Member) Cloud-based, mobile, driverless printing. Enough said.

Print With Me operates convenient printing stations at coworking spaces. Their mobile-first printing solution enables guests and members to easily print and pay in seconds.

SECURITY CAMERAS

You should have cameras on all doors and maybe on the kitchen sink (don't leave the mugs in the sink!). Simple solution that is super easy to setup (just plug-in), inexpensive and can be monitored via an app on your smartphone:

- Nest

You can also work with your local security vendor for hard-wired cameras that you can leave on all day and won't use WiFi bandwidth.

MEMBER COMMUNICATION TOOLS

You will want to create a forum to connect with your members and allow them to connect with each other. Your space management platform may include such a tool...but will your member's login and use it?

Alternatives include:

- Slack - If you're not using this yet, most of your members/clients are! Slack has over six million DAILY average users.

- Private Facebook Group - If your members are on FB, this may be a natural way to get their attention and allow them to network.

- Bisner - If you want a tool that functions like Facebook but isn't Facebook...and doesn't come with the distractions of FB, this may be the one for you.

INTERNET TECH

- Internet service provider
- WiFi Access points
- WiFi dashboard
- Internet switch
- WiFi security

Important note: Unless IT is your background, engage a professional for all Internet-related activities. If you get this wrong your members will not stay. No matter how much they love your community, if you cost their business downtime or lost opportunities due to bad Internet, they will leave you.

IT SERVICES

Imagit (GWA Member) Based in Chicago, Imagit has supported shared workspaces across the country. They can manage your multi-site deployments, upgrades, and refreshes with aggressive timelines and during off-hours.

INTERNET SERVICE PROVIDER

This will be your everything so get it right. And invest. This is not the area in which to cut corners.

If you can get access to a fiber connection, DO IT.

If not, then do everything you can to get a dedicated line to your building/space. Get as close to a "fiber" package as possible. Some urban areas offer "wireless fiber" which can be a good option if you can't get the wired version.

INTERNET TECH (CONTINUED)

ACCESS POINTS

Access Points take the signal from your Internet Service Provider (i.e., Comcast) and broadcast a WiFi signal. You want to have enough of these to balance the demand load. But not so many that they cause channel interference.

Two favorite brands in the coworking space are:
Meraki (owned by Cisco). I know Meraki because I use it in my space. You can license a dashboard to go with your APs that allow you to see usage at the AP level, and the client level, shape traffic, block sites, etc. An invaluable tool for troubleshooting when you have a member complaint that requires investigation.
Ruckus: Has a lot of fans for its reliability and ease of use.

INTERNET SWITCH/ETHERNET PORTS

While WiFi has come a long way, baby, there are still advantages to offering ethernet ports for connections that bypass the WiFi. essensys has a great article on these benefits.

Ethernet ports will start to add to your construction expenses but 1-2 per office is still generally standard, especially for users that may be using VOIP phones in offices.

WIFI SECURITY

Aerwave (GWA Member) Delivers an intelligent network platform that transforms your Wi-Fi system into a series of dynamic, private networks for your users.

GENERAL BUSINESS TOOLS

- Accounting Software
- Team/internal communication
- Team project management
- Connecting the dots/automation

ACCOUNTING SOFTWARE

Make sure you get set up with a good bookkeeper and an accounting system that he/she can work with. Most space management platforms will interface with Quickbooks. Other options include:

Quickbooks (repeating for readability)

Xero - An alternative to Quickbooks

TEAM COMMUNICATION TOOLS & PROJECT MANAGEMENT

- Asana - You may manage some team communication through your CRM in terms of assigning client/member-related to-dos but for other projects and daily tasks, try Asana. Organize by project, assign tasks to team members, assign due dates, make comments on projects as they evolve - and keep all if it out of your email inbox!
- Trello - Similar to Asana, slightly snappier interface.
- Slack - If you're not using this yet, most of your members/clients are! Slack has over six million DAILY average users.

CONNECTING THE DOTS

If you haven't gotten into "Zaps" yet, you're in for a treat. See examples of a series of on-boarding Zaps here.

LEAD-GEN PARTNERS FOR VIRTUAL OFFICES, CONFERENCE ROOMS AND MEMBERSHIPS

Organic SEO and even paid search should be a core part of your marketing strategy. But also consider leveraging the shared space online marketplaces that are also investing in digital marketing to play matchmaker for shared workspace users and providers.

Most of these third parties will charge a referral fee or take a % of each transaction, which you can consider a marketing expense. You can list with every one of them if you'd like. Just keep track and be sure to update all of your listings as pricing, availability, etc. change.

This first segment of the list are third-party partners that I've worked with. The second list are marketplace options that I have not worked with.

- CloudVO (GWA Member)
- Davinci Virtual Office Solutions (GWA Member)
- Find Workspaces (GWA Member)
- Instant Offices (GWA Member)
- Liquidspace (GWA Member)
- Preferred Office Network (GWA Member)
- Search Office Space (GWA Member)
- Deskpass
- Peerspace
- Croissant

- Coworker
- Desks Near Me
- PivotDesk
- Share Desk
- Share My Office

INBOUND LEAD GENERATORS FOR VIRTUAL OFFICES

As mentioned above, you are in great shape if you can drive your own leads into your marketing funnel but generally, you'll build your business more quickly if you get leads from marketing engines that spend all day getting leads for these services. Consider listing with the providers below. You can list with one or all of them.

A few notes about building a virtual mail business...it takes time, but it compounds over time. Start early, be consistent and patient and your efforts will pay off.

- Anytime Mailbox (GWA Member)
- CloudVO (GWA Member - offers live answering services as well)
- Davinci Virtual Office Solutions (GWA Member - also offers live webchat services and live answering services)
- iWorkSpaceMail (GWA Member)
- Spheremail (GWA Member)

Have a tech, tool, or other coworking providers that you'd recommend to others?

Send me an email: jamie@globalworkspace.org

P.S. Don't miss out on the Everything Coworking Podcast for more coworking resources!