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COWORKING

FRANCHISE MARKETING PLAYBOOK

2026

Comprehensive Franchise Marketing Operations Manual

Venture X | Office Evolution | Intelligent Office | Intelligent Assistant

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Franchise Marketing Playbook 2026

Office Evolution | Intelligent Office | Venture X | Intelligent Assistant



This playbook is the operating manual for marketing a VAST franchise location. It defines how franchise owners and Units Marketing work together — who does what, which channels matter, the technology that powers it all, and the rhythm that keeps growth consistent. The goal is simple: more qualified leads, stronger local visibility, and sustainable growth at every location.

VAST Coworking is the world's largest coworking network, spanning four global brands. Each brand serves a distinct audience, but the marketing principles in this playbook apply across all of them.

Venture X	Office Evolution	Intelligent Office	Intelligent Assistant
Premium, design-forward coworking and offices.	Community-based workspace in suburban markets.	Offices plus live receptionist & business support.	Virtual admin & reception support services.
VAST NETWORK	VAST NETWORK	VAST NETWORK	VAST NETWORK

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1. Welcome to Units Marketing

Units Marketing is the dedicated marketing partner for VAST franchise owners.

Our role is to provide strategy, technology, advertising, content, analytics, training, and ongoing support throughout the lifecycle of ownership — from pre-opening through steady-state growth. This playbook sets the expectations, responsibilities, and best practices that drive results.

Marketing works best as a true partnership. Owners know their local market, members, and community; Units Marketing brings the systems, media expertise, and reporting. The table below summarizes how that partnership works in practice.

The Partnership Model

Above all, we bring strategy. Units Marketing serves as the marketing educator for VAST and its owners — providing innovative, up-to-date strategy and guidance to help you navigate all things marketing. Everything else we do is built on that foundation.

Activity	Owner Responsibility	Units Marketing Support
Strategy	Share local goals, market knowledge, and decisions	Serve as your marketing educator for VAST and owners — bringing innovative strategy and guidance to help you navigate all things marketing
Lead Generation	Execute campaigns and outreach locally	Provide strategy, tools, and ad management
Content	Share local stories, photos, and wins	Create, brand, and distribute content
Reporting	Review KPIs and act on insights	Maintain dashboards and reporting

> **What you can expect from Units Marketing**
> A complete marketing engine — built, managed, and optimized for you — plus the training and reporting to make confident decisions every month.

2. Marketing Philosophy

Sustainable growth comes from a balanced, multi-channel strategy — not a single tactic.

The most successful locations invest across paid media, organic visibility, referrals, partnerships, networking, and lead nurturing at the same time. Each channel plays a different role: some create awareness, some capture high-intent demand, and some nurture relationships until prospects are ready to act.

> **Don’t put all your eggs in one basket**
> If a single channel slows down, a diversified mix keeps leads flowing. Balance protects your pipeline and compounds results over time.

VAST locations grow by working all nine channels together. Here they are at a glance — the full framework appears in Section 9.

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3. Onboarding Program

A structured onboarding gets every new location market-ready, fast.

Onboarding moves through five stages — from the kickoff call to going live with content and ads. Each stage has clear deliverables and owners so nothing slips.



Detailed Onboarding Deliverables

The following deliverables are completed during onboarding to get your location fully market-ready.

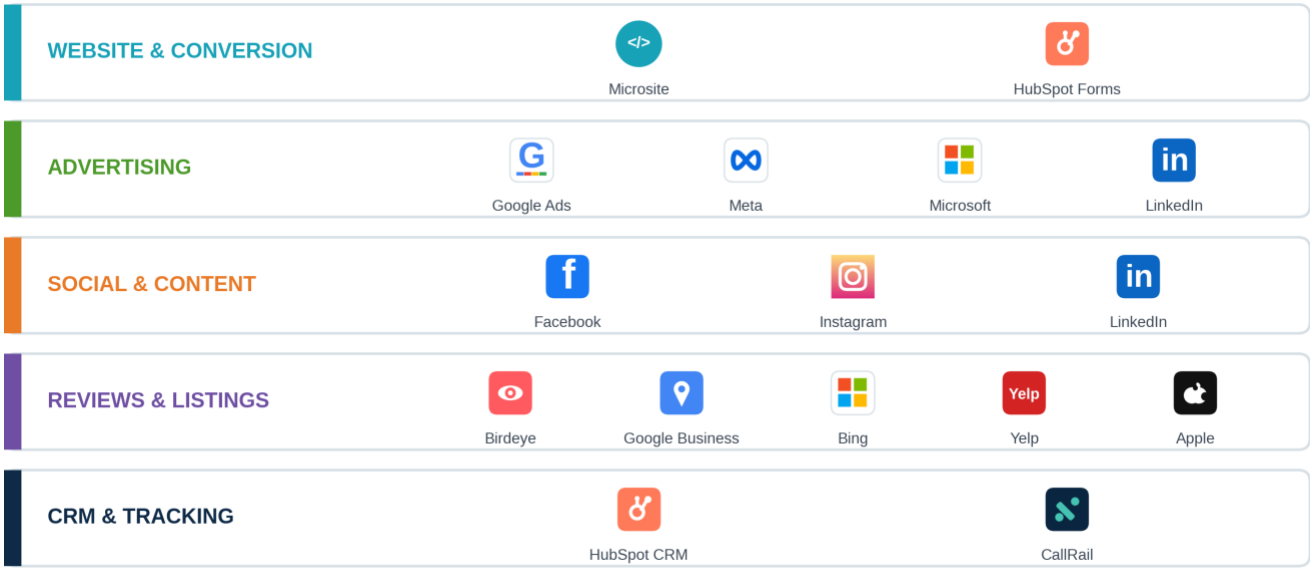
Deliverable	Description
Kickoff Call	Intro meeting and onboarding survey
Handoff Call	Review of all assets and training
HubSpot Training	Recorded training session
Location Microsite	Custom local website
CallRail	Call tracking setup
HubSpot Setup	Forms, workflows, and users
Birdeye	Reviews and listings
Business Listings	Google, Bing, Yelp, Apple
Social Setup	Facebook, LinkedIn, and Instagram
Ad Accounts	Google and Meta setup

4. Martech Stack

An integrated technology stack connects every lead, message, and metric.

From the website and CRM to call tracking, reviews, social, advertising, and reporting — the tools below work together so no lead is lost and every result is measurable.

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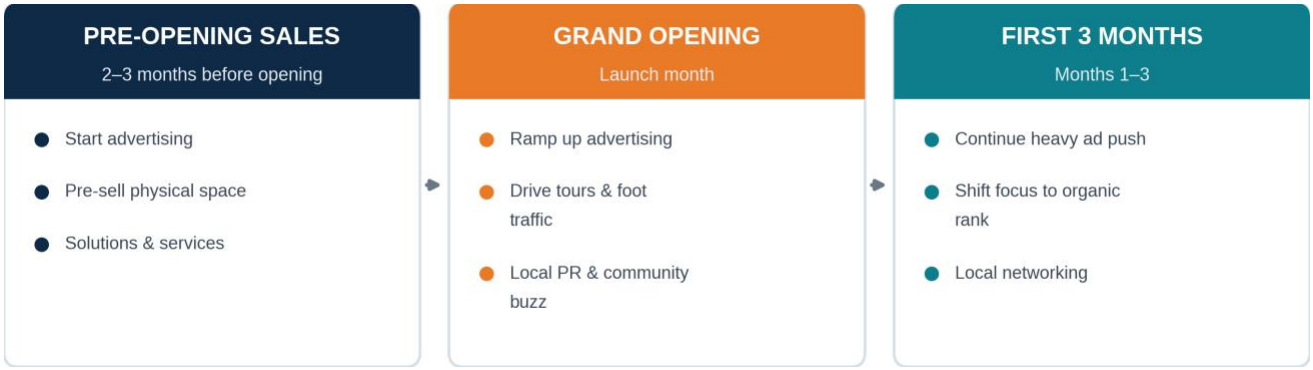


One connected system
HubSpot ties the stack together — capturing leads from every channel, triggering follow-up, and feeding the dashboards owners review each month.

5. New Location Launch Strategy

Build demand before the doors open, then convert it at and after launch.

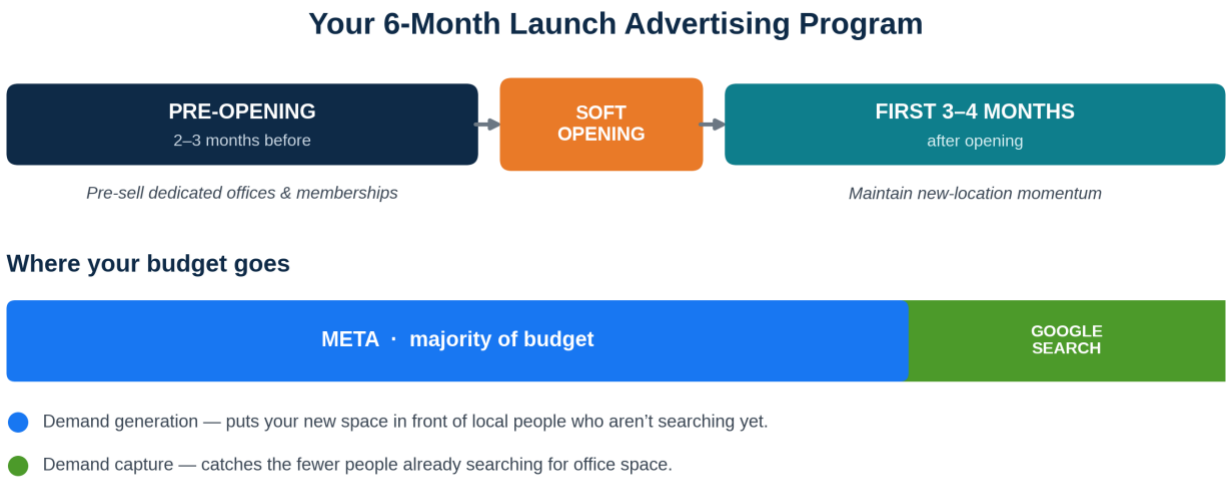
A strong launch spans three phases: pre-opening sales that begin 2–3 months before you open, a high-energy grand opening, and a sustained growth push through the first three months.



Start early
Pre-opening sales are where momentum is built. Start advertising and pre-selling your space, solutions, and services 2–3 months before you open so you launch with a pipeline already in motion.

How We Manage Your Launch Advertising

For a new location, Units Marketing runs and manages your advertising for about six months around your opening: roughly 2–3 months before you open — to pre-sell as much dedicated office space and as many memberships as possible — and 3–4 months after opening, to maintain your new-location momentum.



During this window we deploy a strategy focused heavily on brand awareness, education, and lead generation. A large majority of your budget goes to Meta advertising, which is ideal for generating demand and awareness — exactly what a brand-new location needs when few people know you exist yet. A smaller portion goes to Google Search advertising to capture people actively searching for dedicated office space, and we keep it running until you're ranking organically on your own.

The two tactics do different jobs. Meta is demand generation: it puts your space in front of local people who aren't searching yet, building awareness and interest at low cost and high volume — perfect for getting a new location on the map. Google Search is demand capture: it catches the smaller number of people already looking for office space, who are high-intent and ready to act. We invest less in search early on because search volume for a brand-new, unknown location is limited, then scale it as your organic presence builds.

This paid program is designed to amplify — not replace — the local, relationship-driven work only you can do: local advertising, networking, building broker relationships, developing referral networks, and showing up in your community. Paid ads fill the top of your funnel and get you discovered quickly; your local efforts build the trust and relationships that close deals and sustain the location long term. The two work best together.

This approach is ideal for a new small business because you start with zero awareness and no organic ranking. Meta's low-cost reach builds awareness and a lead pipeline fast and affordably, while a lean search budget captures ready buyers — maximizing impact per dollar during the critical launch window. As your organic rankings, reviews, and local relationships take hold, your reliance on paid advertising can taper. Front-loading awareness this way is the fastest, most cost-effective path to filling space and building momentum from day one.

6. Ongoing Ad Fund Support

Your ongoing investment funds the content, technology, media, and expertise that keep leads coming.

The ad fund supports a continuous program rather than one-off campaigns. It covers:

- **Advertising:** managed paid search and paid social, with budget pacing and optimization.
- **Content:** social posts, blogs, email, and refreshed ad creative.
- **Technology:** CRM, call tracking, reviews, listings, and reporting tools.

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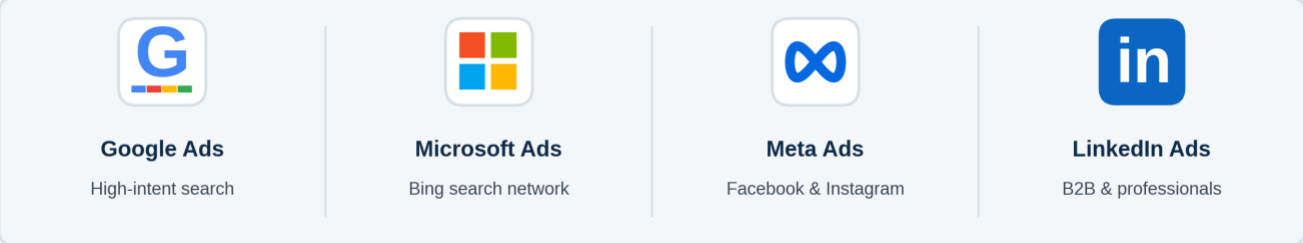
- **Support & training:** strategy guidance, optimization, and owner enablement.
- **Reporting:** dashboards and monthly reviews that turn data into action.

> **Always-on beats stop-and-start**
> Consistent investment compounds. Pausing media resets momentum and raises the cost to re-enter the market.

7. Performance Management

Paid media is actively managed across the platforms that reach your buyers.

Campaigns run where intent and audiences live — Google and Microsoft search, Meta, and LinkedIn — with budgets, targeting, and creative optimized continuously against cost-per-lead and conversion goals.

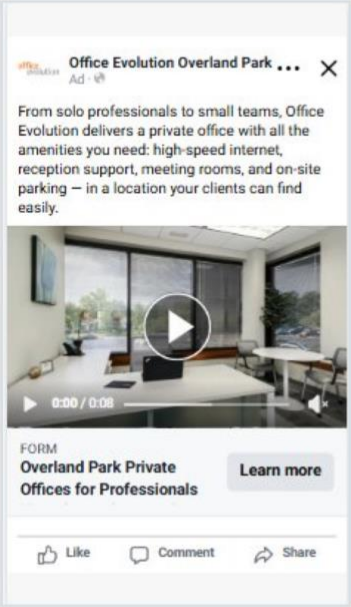


Example Ad Creative

Below are real examples of paid search and paid social ad creative across VAST brands — a Google search ad and Meta lead ads. Final creative is tailored to each location and brand.

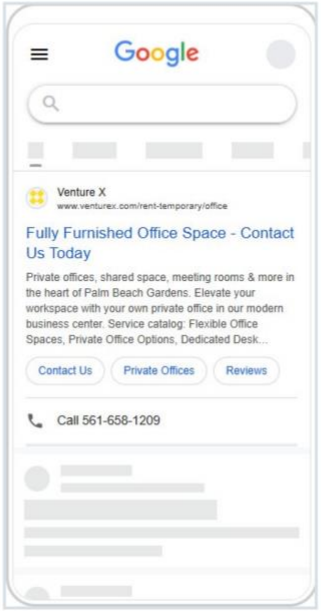
META LEAD AD

Office Evolution



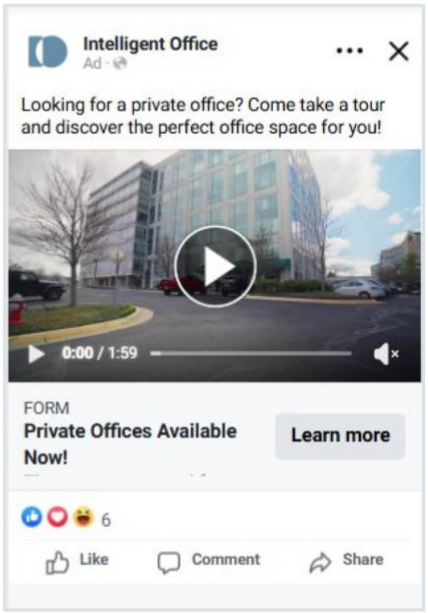
GOOGLE SEARCH AD

Venture X



META LEAD AD

Intelligent Office



Paid Channels to Explore

Paid media spans several channels. These are the ones that make the most sense for coworking — start with the core channels and test the others as budget allows.

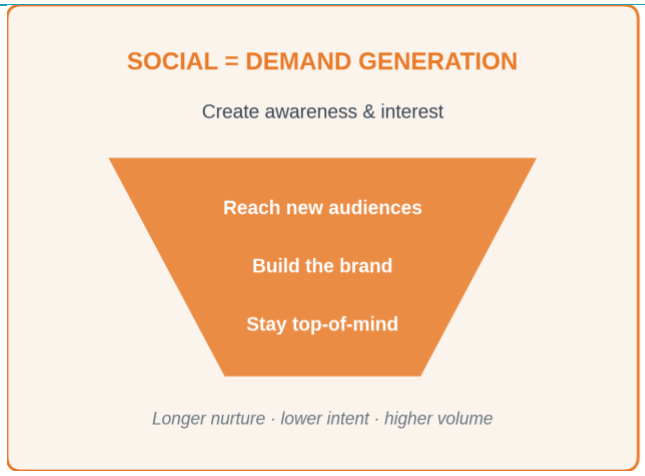
Channel	Best For	Lead Intent	Priority
Google Search Ads	People actively searching for office & coworking space	**High**	**Core**
Microsoft (Bing) Ads	High-intent search at a lower cost per click	**High**	**Core**
Meta (Facebook & Instagram)	Awareness and lead volume across a broad audience	Low	**Core (volume)**
LinkedIn Ads	Reaching businesses, teams, and professionals	**Medium**	Secondary
TikTok Ads	Short-form video brand awareness (experimental)	Low	Test

8. Search vs. Social Leads

Search and social leads behave differently — and both matter.

Search captures people who are actively looking and ready to act: higher intent, faster to convert, lower volume. Social generates demand earlier in the journey: it builds awareness and interest, so it needs nurturing but fuels the top of the funnel. Strong locations use both and measure them on their own terms.

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> **Judge each channel by its job**
> Don't expect a social impression to convert like a high-intent search click. Attribute and nurture leads according to where they came from.

Meta Leads: Low Intent, Lower Conversion

Meta lead ads (like the examples earlier) put an easy form in front of people who were not actively searching for workspace. That reach is valuable — but it means Meta leads are low-intent. Expect a much lower conversion rate from Meta leads than from paid or organic search, where people are actively looking and ready to act.

That doesn't make Meta a bad channel — it fills the top of your funnel with volume at a low cost per lead. Just measure it accordingly: judge Meta on lead volume and cost per lead, give those leads extra nurturing and patience, and don't hold them to the same conversion rate as search.

> **Set expectations: lower conversion is normal**
> A Meta lead is someone who showed mild interest — not someone ready to sign. Nurture them persistently and measure success by cost per lead and volume, not by the higher conversion rates you see from search.

9. The 9-Channel Marketing Mix

The complete framework for local growth — nine channels working together.

This is the heart of the VAST approach. Each channel drives a specific outcome; together they create a consistent engine for leads and growth. Review it often and make sure every channel is active.



10. Referrals & Partnerships

Relationships are the highest-converting source of new members.

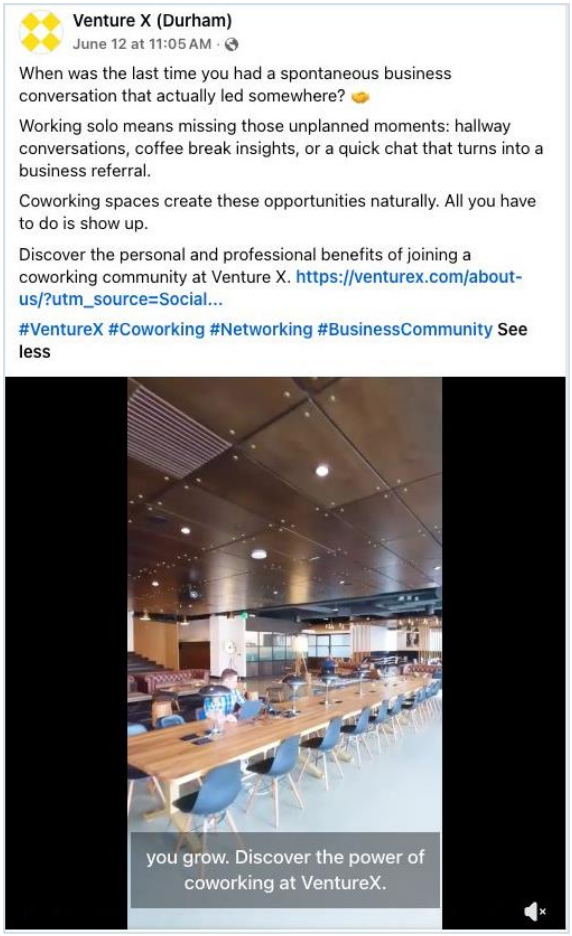
Referrals from happy members and a steady pipeline from brokers and partners convert better than almost any paid source. Build these deliberately:

- **Member referrals:** make it easy and rewarding for members to refer others.
- **Broker relationships:** stay top-of-mind with the brokers who place tenants.
- **Local partners:** build reciprocal relationships with nearby businesses and organizations.
- **Track everything:** capture referral sources in the CRM so you can nurture and reward them.

11. Content Marketing

Content builds trust, fuels every channel, and tells your local story.

Blogs, social posts, email, and local storytelling work together to attract, engage, and nurture. Owners provide the local color — events, member wins, and photos — and Units Marketing turns it into branded, on-message content distributed across channels.



A real organic post from Venture X Durham.

> **Local stories win**
> Authentic, location-specific content outperforms generic posts. A member success story or a behind-the-scenes look builds more trust than a stock promotion.

12. Your Social Platforms

We post for you every month — you make it local.

Each month, Units Marketing publishes 12 branded national posts to your social channels to keep your presence consistent and on-brand. Your job is to supplement those with authentic, location-specific content that shows off your space, your people, and your community. The national posts keep you on-brand; your local posts make you relevant and discoverable.



Great local content includes:

- **Member spotlights:** celebrate a member or feature their business.
- **Local promos:** day passes, referral offers, and seasonal specials.
- **Photos & videos of your space:** real shots of offices, meeting rooms, and amenities.
- **Local blog content:** posts about your city and workspace tips, repurposed to social.
- **Events:** workshops, mixers, and open houses you host or attend.
- **Community news:** local happenings and businesses you partner with.
- **Local networking organizations & groups:** chambers, BNI, and meetups you belong to.
- **Meet your team:** introduce the friendly faces at your location.

Create Once, Use Everywhere

Make content creation efficient by capturing once and repurposing widely:

- Capture authentic photos and short videos at your location — real beats stock every time.
- **Multipurpose every idea:** a single member spotlight becomes a social post, a microsite blurb, and a short local blog.
- Cross-post across all your channels and feature it on your microsite so one effort works everywhere.
- Keep a simple monthly shot list so you're never scrambling for content.

Plan & Schedule with Birdeye

Use Birdeye to build and schedule a full month of social content in one sitting:

- Batch-create your local posts and schedule the whole month at once.
- Space your local posts around the national ones for a steady, consistent cadence.
- Schedule it once and let it publish all month — then track engagement and adjust.

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We share next month's content first
Each month we send a preview of the coming national content so you can plan local posts that complement it. Remember: your local content supplements — it never replaces — the national organic posts.

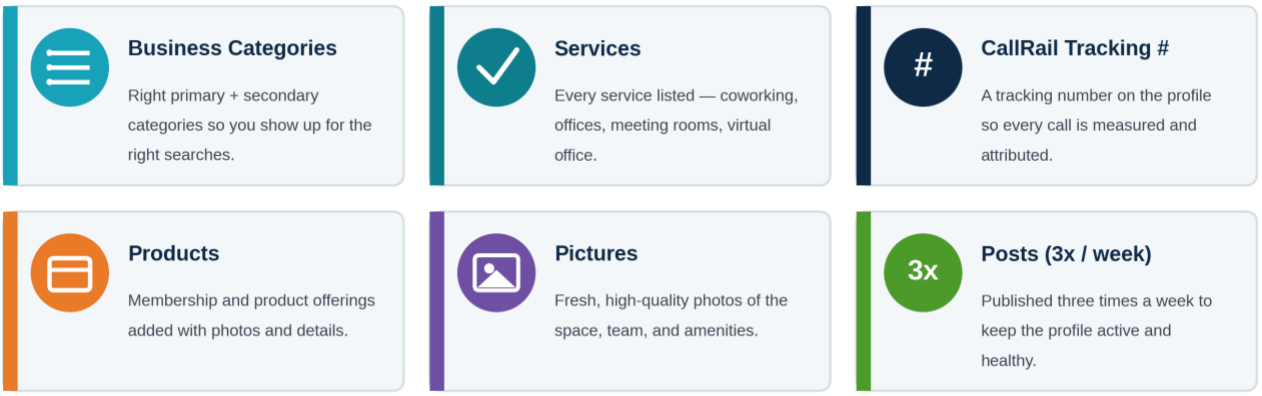
13. SEO & Local Visibility

When prospects search locally, your location should be the obvious answer — and reviews are what get you there.

Your Google Business Profile is the single most important asset for local visibility. Units Marketing builds and maintains each location's profile to a consistent, optimized standard and keeps it active month after month — so you don't have to manage the technical details. Consistent name, address, and phone are mirrored across Google, Bing, Yelp, and Apple.

How We Optimize Your Profile

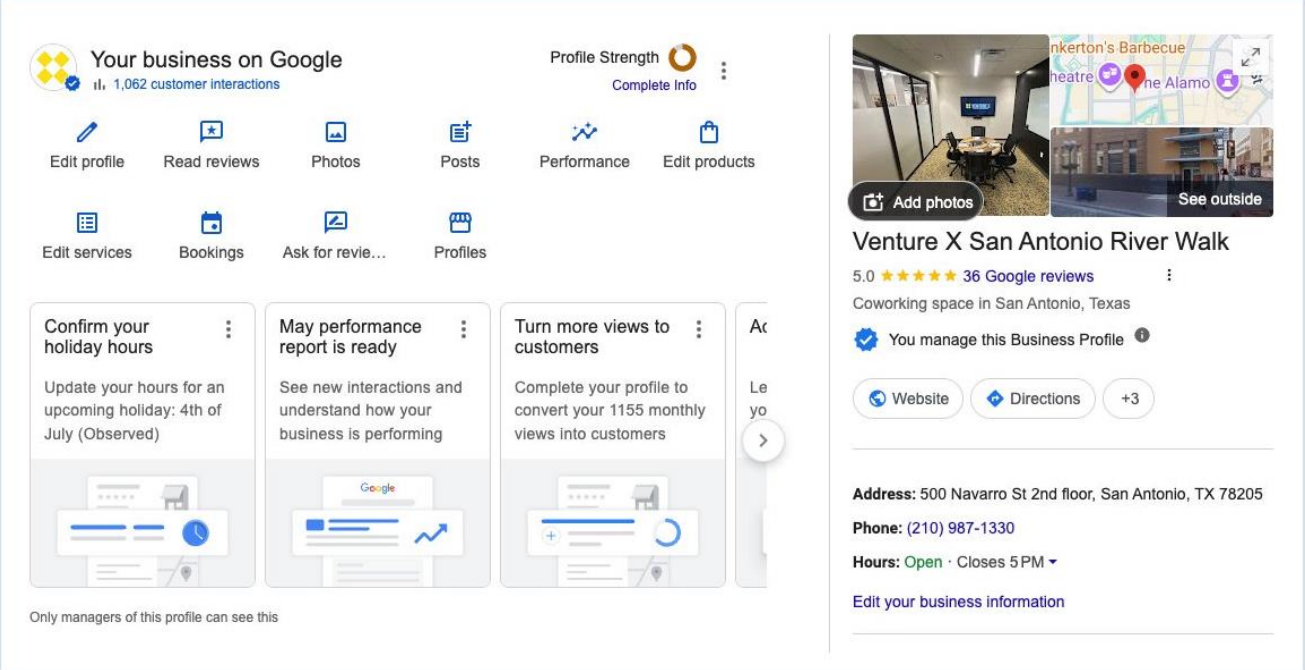
Every location's profile is set up and maintained across these six levers:



- **Business categories:** the right primary category plus relevant secondary categories so you appear for the searches that matter.
- **Services:** all services listed — coworking, private offices, meeting rooms, virtual office — so Google can match you to more queries.
- **CallRail tracking number:** a tracking number on the profile so every call from Google is measured and attributed to the channel.
- **Products:** membership and product offerings added with photos and descriptions to enrich the profile and capture interest.
- **Pictures:** fresh, high-quality photos of the space, team, and amenities — strong photos drive more views and actions.
- **Posts, 3x per week:** we publish three posts every week to keep the profile active and signal an engaged, healthy business.

An Actual Managed Profile

Here is a live, fully managed profile — Venture X San Antonio River Walk — showing a complete profile, a strong review base, and the management tools we work in (posts, products, services, photos, and performance):



Reviews: Your #1 Lever for Rank

> **Frequent, consistent reviews win**
> Nothing moves your local rank like a steady stream of fresh reviews. Profiles that earn reviews frequently and consistently outrank those that don't — it is the single biggest lever a location controls. The goal is an ongoing flow, not occasional bursts.

Getting more reviews is great — but how you ask matters. Google prohibits incentivized reviews and "review gating," and violations can get reviews removed or the profile penalized. Stay well within the rules with these practices:

- **Ask everyone, not just your fans:** invite all members and guests to leave honest feedback. Selectively soliciting only happy customers ("gating") is against Google's policy.
- **Never offer incentives:** no discounts, gifts, credits, free hours, or prizes in exchange for a review — incentivized reviews violate Google's rules.
- **Make it effortless:** share your Google review link or a QR code (use the profile's built-in "Ask for reviews" link) so a review takes seconds.
- **Ask at natural moments:** after a great tour, a renewal, a successful event, or a member milestone — a genuine, personal request, not a mass blast.
- **Build it into the routine:** make a friendly ask part of everyday front-desk and member interactions so the flow stays steady and consistent.
- **Respond to every review:** reply promptly and graciously to each one — it signals an active, trusted business to customers and to Google.
- **Keep it honest:** never post reviews from staff, friends, or fake accounts, and don't route unhappy customers away from Google.

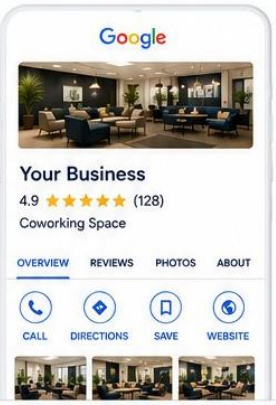
Share this quick reference with your team — five proven, consistent actions that lift your local organic rankings and drive more local leads:

5 Proven Ways to Boost Your Local Organic Rankings

Simple actions. Stronger visibility. More local leads.



1



IMPROVE YOUR GMB PROFILE THROUGH CONSISTENT REVIEWS AND POSTING ONE NEW PHOTO PER MONTH

- Keep your profile active and complete
- Respond to every review
- Post updates weekly
- Add one new photo each month to keep your profile fresh

WHY IT MATTERS

Google rewards active profiles with more visibility in Maps and local search.

Reviews + Activity = Higher Rankings

2



POST TO YOUR LOCAL BLOG

CREATE HYPER LOCAL CONTENT THAT YOUR COMMUNITY IS SEARCHING FOR

- "Best place to work remotely in [city]"
- "Top places to grab a coffee in [city]"
- Local events, updates, and business tips
- Showcase your workspace and community

WHY IT MATTERS

Fresh, local content helps you rank for more search terms and builds local relevance over time.

3



BUILD BACKLINKS & PARTNERSHIPS

- Join the Chamber of Commerce
- Partner with local business associations
- Sponsor community events
- Get listed on trusted local websites
- Earn high-quality backlinks that boost your authority

WHY IT MATTERS

Backlinks from local, relevant websites improve your domain authority and search rankings.

4



SOCIAL MEDIA CONTENT

(BOTH PAID & ORGANIC) – VIDEO IS KING!

- Share videos of your space, members, and events
- Run targeted ads to reach local audiences
- Engage with your community online
- Drive traffic, build brand awareness, and earn more visibility

WHY IT MATTERS

Social signals, video content, and engagement increase brand visibility and can drive more traffic to your website.

Video gets the most attention!

5



CUSTOM FAQS ON YOUR MICROSITE SUB-PAGES

- Add 2–3 custom FAQs per page
- Answer real questions your prospects are searching
- Helps with SEO and builds trust
- Improve user experience and conversions

WHY IT MATTERS

FAQs help you rank for long-tail keywords and provide quick answers that convert visitors into leads.

CONSISTENT ACTIONS = STRONGER RANKINGS + MORE LOCAL LEADS

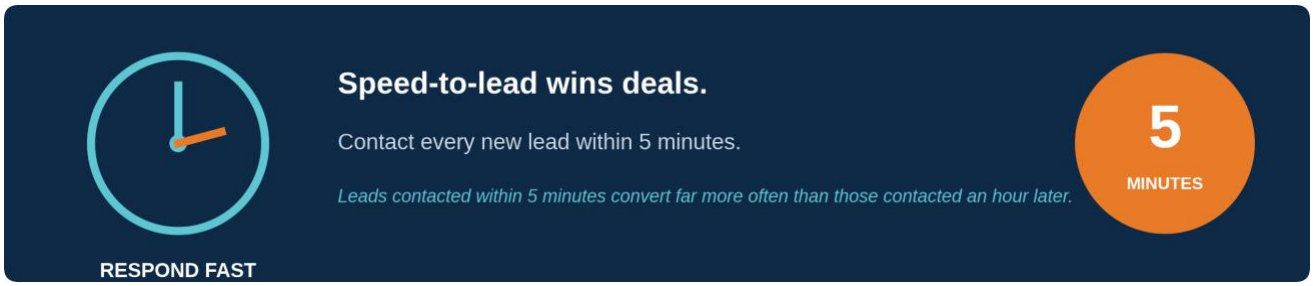
Focus on these 5 areas consistently and watch your visibility (and business) grow!

PRIVATE OFFICES | COWORKING | VIRTUAL OFFICES | MEETING ROOMS

14. Lead Management

Speed and follow-through turn leads into members.

Every lead deserves a fast, consistent response and a structured follow-up cadence. The faster you respond, the more likely you are to win the tour — and the deal.



- **Respond fast:** aim to contact every new lead within 5 minutes.
- **Use the CRM:** log every lead, automate follow-up, and never let one go cold.
- **Follow a cadence:** a defined sequence of calls, texts, and emails over the first days.

15. Working the Pipeline in HubSpot

HubSpot is your single source of truth — work every lead through the pipeline, every day.

Every lead becomes a deal that moves through clearly defined stages. The pipeline shows exactly where each prospect stands and what needs to happen next. The discipline is simple: keep deals moving, never let one go cold, and always know your next action.

Your Sales Pipeline in HubSpot

Work New Lead to zero every day



The Deal Stages

Deal Stage	What it means / what to do
New Lead	Kept intentionally empty so brand-new leads stand out. Work this column to zero every day — respond within 5 minutes, then move the deal forward.
Attempted Outreach	Your “in-limbo” leads: you are actively trying to reach them but haven’t connected yet. Keep following up across channels.
Qualified	You’ve connected and confirmed a real person with a real need. Now drive toward a tour.
Tour Scheduled	A tour or in-person visit is booked on the calendar.
Tour Completed	They’ve toured the space. Follow up quickly and send a proposal.
Proposal Sent	Pricing or a proposal is out. Stay close and work toward the close.
Closed-Won	They became a member. Hand off to onboarding and celebrate the win.
Closed-Lost	You’re pausing daily nurture — not gone forever. Always pick a Closed-Lost reason; many of these re-engage later.

Closing a Deal as Lost

Closed-Lost doesn’t mean gone forever — it means you’re pausing daily nurture and hope to re-engage later. Whenever you move a deal to Closed-Lost, choose the reason that best represents why it didn’t become a customer. A few important ones:

Closed-Lost Reason	What it does
Waitlisted	For locations whose physical space is full. Adds the lead to the waitlist report on your location dashboard.

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Closed-Lost Reason	What it does
Not a Good Fit	They are not a good fit for you. Opts them out of future marketing emails.
Qualified – Disengaged After Sales Engagement	They were a qualified lead and then went quiet during the sales process.

> **Pick the right reason**
> The Closed-Lost reason isn't just record-keeping — it drives action. "Waitlisted" feeds your location's waitlist report, and "Not a Good Fit" removes the lead from future marketing emails. Choosing accurately keeps your data and automations clean.

How to Work the Pipeline

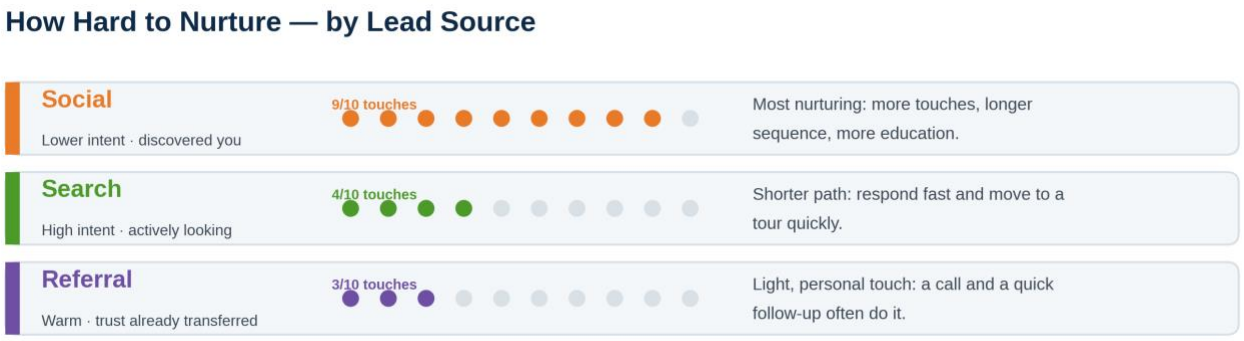
A sales seat keeps the pipeline healthy by following a few non-negotiable habits:

- **Always have a next step:** every deal in an active stage must have a future task attached — no deal sits without a scheduled next action.
- **Always attach a value:** give every deal a value — either a potential monthly value or the total potential value of the lead — so the pipeline reflects real revenue.
- **Use all three channels:** reach every prospect by email, phone, and SMS, not just one.
- **Several rounds of outreach:** follow up multiple times across days before giving up — most deals are won on a later touch, not the first.
- **Keep all notes in HubSpot:** log every call, text, and email so the full history lives in one place.
- **Work New Lead to zero:** clear the New Lead column every day so nothing waits.

Nurturing a Lead from Start to Finish

Nurturing is a multi-touch, multi-channel journey. From the moment a lead arrives, respond immediately, then keep showing up: a new lead gets an instant SMS and email, a same-day call, and a structured sequence of follow-ups over the next two weeks. As you connect and qualify, move the deal forward — Qualified, Tour Scheduled, Tour Completed, Proposal Sent — and close it Won, or Lost with a reason if it stalls.

Not every lead needs the same intensity. Match your effort to the lead's intent and how they found you:



- **Social leads need the most nurturing:** they discovered you rather than searching, so intent is lower. Give them more touches, a longer sequence, and more education before they're ready.
- **Search leads are higher intent:** they were actively looking, so respond fast and move them to a tour quickly.

- **Referral leads are warm:** trust is already transferred, so a lighter, more personal touch usually closes them.

Example Workflow Automation

Match the cadence to the lead. How hard and how long you nurture should track the lead's intent and how it found you — lower-intent leads need more touches over more days, while warm, high-intent leads convert faster with a lighter, more personal touch. In every case, use all three channels (email, phone, and SMS) and log each touch in HubSpot. Recommended cadences for the three main lead types:

Social Leads (Organic & Paid) — lowest intent, most nurturing

Social leads discovered you while scrolling, not while searching for office space, so intent is low. They need the most work: at least 10 touches across two weeks, blending education, a reason to visit, and a time-bound offer to move them from curious to committed. Persistence is everything — most social leads convert on a later touch, not the first.

Day	Touchpoints	Goal
Day 1	Email + SMS + Call	Initial outreach — introduce your space and how you can help
Day 2	Email + SMS + Call	Invite them in for a tour
Day 4	SMS + Email	Share a limited-time offer
Day 6	Call + SMS	Check in again
Day 8	Email + Call	Create a sense of urgency
Day 14	Email + SMS + Call	Final outreach before pausing nurture

Referrals — warmest leads, keep it light and personal

A referral comes with trust already transferred from the person who sent them, so the hard part is done. Keep it light and personal: lead with a phone call, mention who referred them, and move quickly to a tour. Over-automating a referral feels impersonal and can waste the goodwill that created it — a few genuine, well-timed touches usually close them.

Day	Touchpoints	Goal
Day 1	Call + personal Email	Warm intro — reference the referrer and invite them for a tour
Day 2	SMS	Friendly nudge if you haven't connected
Day 4	Call	Book the tour and answer questions personally
Day 7	Email	Share details and a gentle reminder
Day 10	Call + SMS	Final personal check-in

All Other Leads (Search, Other Campaigns, Offline) — high intent, move fast

Organic and paid search, other campaigns, and offline sources are actively looking for space right now, so intent is high. Speed wins: respond within five minutes and push toward a tour quickly. They don't need as many touches as social leads, but stay persistent for two weeks with a clear path to book a visit and a nudge or offer if they stall.

Day	Touchpoints	Goal

Day 1	Email + SMS + Call	Respond within 5 minutes — they're actively searching
Day 2	Call + SMS	Invite them in for a tour
Day 4	Email + Call	Share options and book the tour
Day 7	SMS + Email	Offer a limited-time incentive
Day 10	Call	Check in and address any objections
Day 14	Email + Call	Final outreach

> **Work every cadence in HubSpot**
> Give every active lead a next task and a deal value, and log each call, text, and email. If a lead doesn't respond after the full cadence, move it to Closed-Lost with a reason — you're pausing daily nurture, not giving up. Many re-engage later.

We recommend building a custom workflow automation for your location to make this nurture consistent and hands-off. The example on the next page is modeled on a real Intelligent Office sequence: a 14-day, multi-touch journey that layers email, SMS, and call tasks across several rounds of follow-up. It shows how persistent, automated follow-up keeps deals moving — and how a prospect who responds at any step exits the automation and advances through the pipeline toward a close.

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Sample Workflow Automation

14-day multi-touch lead nurture · email + SMS + call tasks



PROSPECT RESPONDS

Move to Qualified → Tour Scheduled →
Tour Completed → Proposal Sent → Closed-Won.

NO RESPONSE BY DAY 14

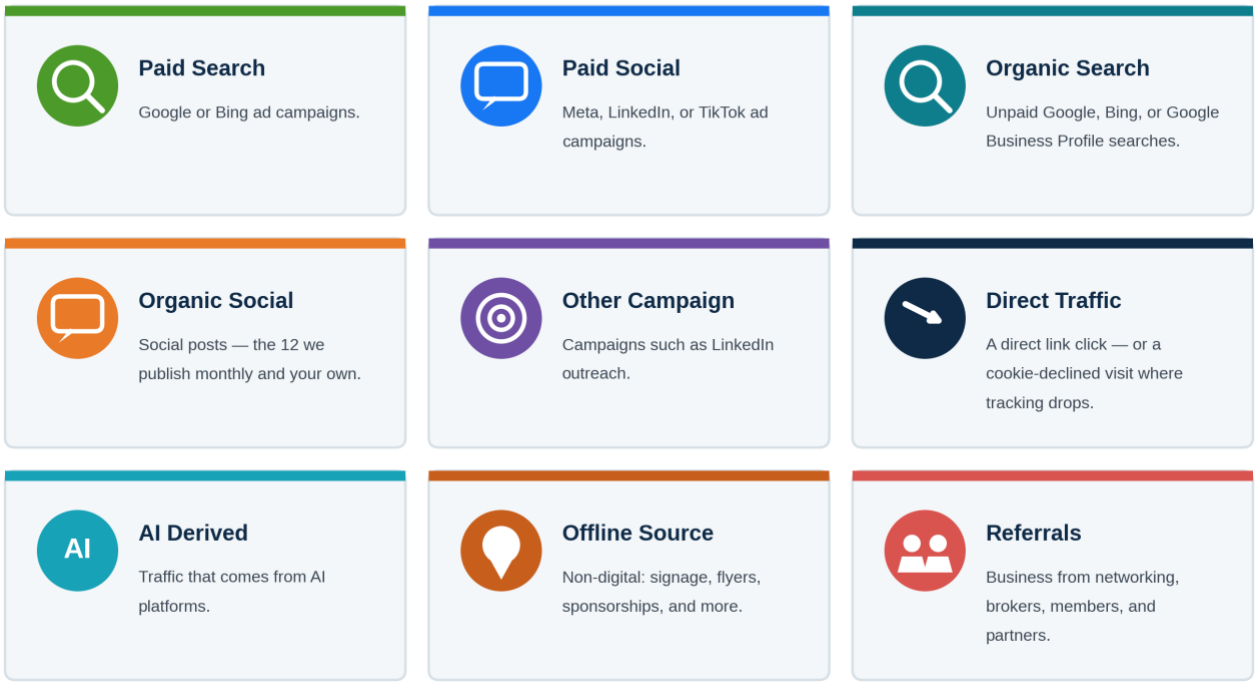
Auto-set Closed-Lost (Unresponsive).
Not gone for good — re-engage later.

16. HubSpot Lead Sources

Know where every lead comes from — so you can read your reports and invest where it counts.

In HubSpot, every contact is tagged with a source that shows how they found you. Understanding what each source means keeps your reporting accurate. Here's a quick guide:

HubSpot Lead Sources — What Each One Means

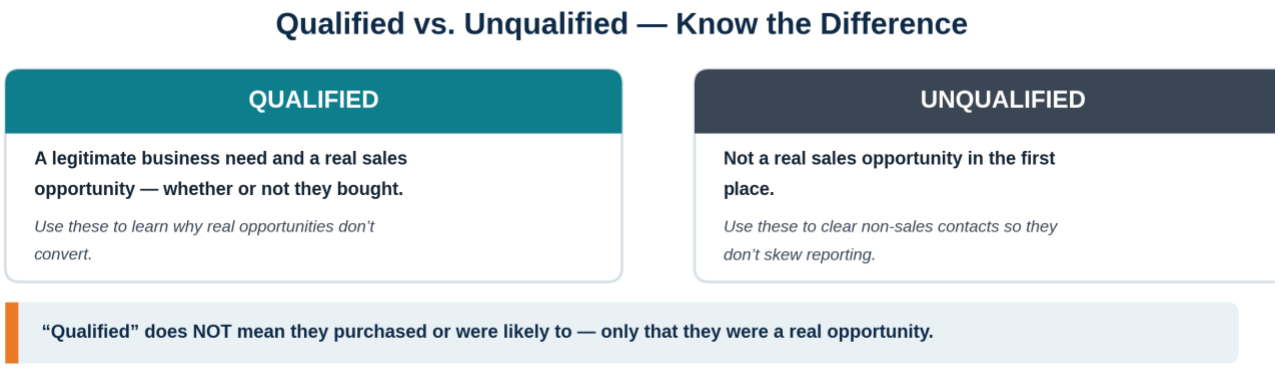


> **Why "Direct" matters**
> Direct Traffic includes anyone who lands without trackable attribution — including visitors who decline website cookies. It doesn't mean marketing didn't influence them.

17. Choosing the Right Closed-Lost Reason

When you close a deal as lost, the reason you pick is what makes your reporting useful.

Closed-Lost isn't the end of the story — the reason you select tells VAST and Units Marketing why real opportunities don't convert, and keeps non-sales contacts from skewing your numbers. Every reason falls into one of two buckets, Qualified or Unqualified, and choosing accurately is what turns pipeline data into insight.



The distinction matters: "Qualified" does not mean the prospect bought or was likely to — it means they were a legitimate opportunity. Separating qualified losses from unqualified ones lets you analyze genuine conversion gaps instead of noise.

Qualified Closed-Lost Reasons

Use a Qualified reason when the prospect had a legitimate need and was a real sales opportunity, but the deal didn't close. In HubSpot these appear as "Qualified: [reason]."

Reason	What it means / when to use it
Interested in Another Location	A real buyer who chose a different VAST location. Transfer the opportunity to that location's sales team before closing this deal.
Budget / Approval	A real buyer, but budget, financial constraints, or required approval stopped them from moving forward right now.
Timing	A legitimate need, but the timing isn't right. They intend to revisit later — different from someone who simply stops responding.
Competitor	Qualified, but chose another coworking / flexible-office provider. If you don't know why they left, use Disengaged instead.
Didn't Sign Renewal	An existing member chose not to renew an agreement you were actively pursuing.
Traditional Space	Decided conventional office / real estate (a standard lease or building) is a better fit than flexible space.
Needs Have Changed	Their circumstances changed, so they no longer need the space — downsizing, closing, going fully remote, or changed plans.
No Inventory	Qualified and ready, but no available product meets their requirements. Availability is the blocker — not preference.
Disengaged After Sales Engagement	Qualified and engaged, but communication stopped before a reason emerged, despite meaningful follow-up.
Waitlisted	Qualified and wants a specific product that's unavailable; placed on a waitlist to reconnect when inventory opens.

Unqualified Closed-Lost Reasons

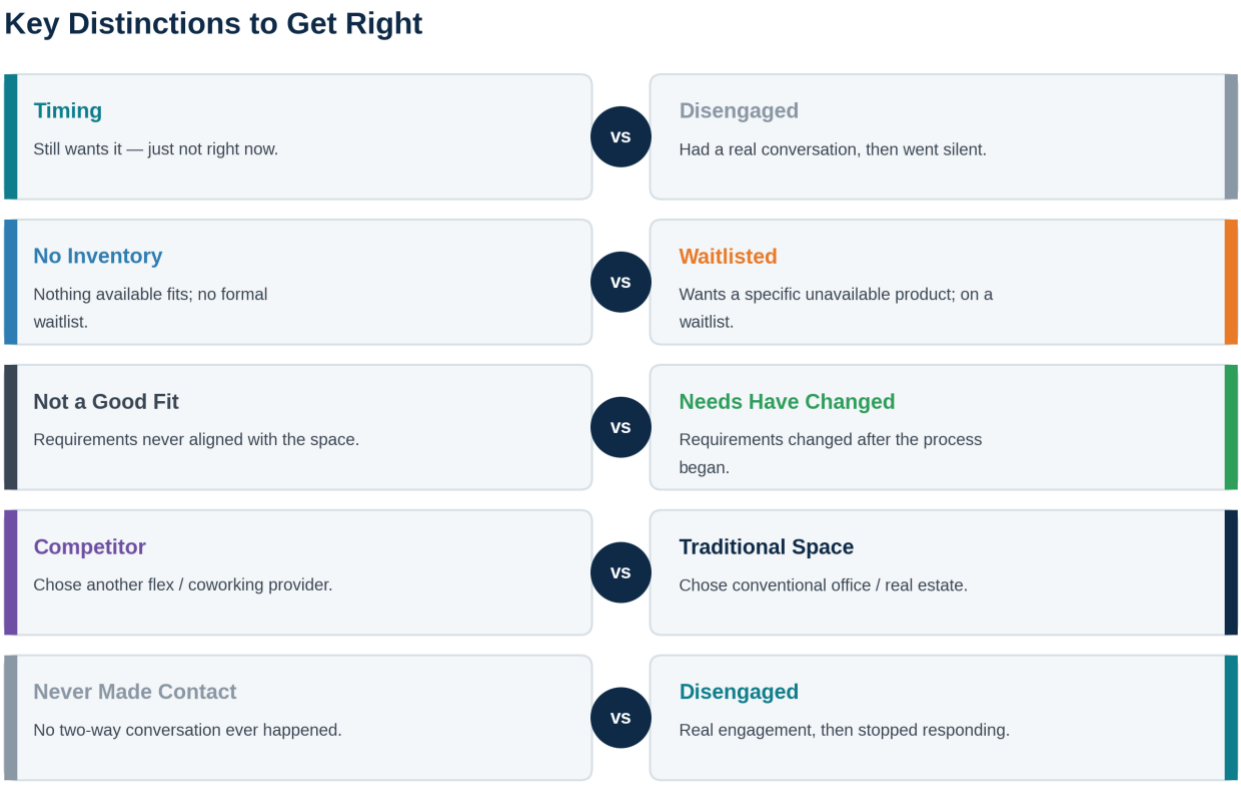
Use an Unqualified reason when the contact was never a real sales opportunity. These keep non-sales contacts out of your conversion analysis. In HubSpot these appear as "Unqualified: [reason]."

Reason	What it means / when to use it

Member Call	About an existing member or customer issue — billing, account, or access — not a new sales opportunity.
Never Made Contact	You never actually connected despite reasonable outreach; there was no meaningful two-way communication.
Not a Good Fit	Their needs clearly don't align with what the location or brand offers, even if they were interested.
Not a Serious Buyer	Inquired but showed little real intent — no identifiable need or timeline, or repeated info requests without progress.
Not Sales Related	Not a sales opportunity and doesn't fit another category — general, partnership, vendor, or employment inquiries.
Solicitor	Someone trying to sell to the location (vendors, marketers, insurance, service providers), not to buy.

Key Distinctions to Get Right

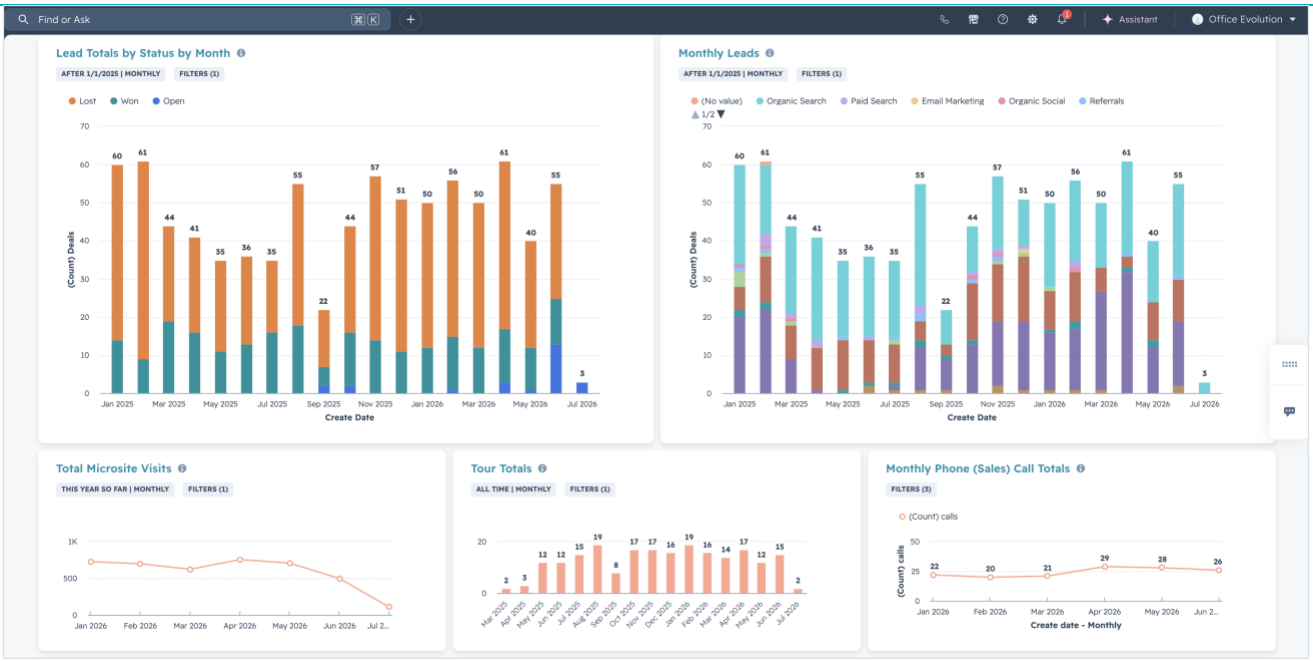
A few reasons are easy to confuse. Use these quick comparisons to pick the right one every time.



18. KPIs & Reporting

Dashboards keep everyone accountable and focused on what works.

Units Marketing maintains live dashboards covering leads, cost-per-lead, tours, conversions, and channel performance. Owners review them monthly to spot trends and reallocate toward what's working. The dashboard below is an example from a live Office Evolution location dashboard.



> **Measure what matters**
> Track the full funnel — from leads to tours to members — not just clicks. The goal is members, and every metric should ladder up to that.

19. Monthly Operating Rhythm

A simple monthly cadence keeps marketing consistent and compounding.

Great results come from showing up every month: review, create, engage, and optimize. The cadence below keeps owners and Units Marketing aligned week to week.

WEEK 1 Review & Plan	WEEK 2 Create & Publish	WEEK 3 Engage & Outreach	WEEK 4 Measure & Optimize
Review last month KPIs	Publish social + blog	Broker / partner touch	Check pacing & spend
Plan content calendar	Refresh ads & creative	Request reviews	Optimize by channel
Set channel priorities	Send email campaign	Community networking	Prep monthly report

20. Websites, Microsites & E-commerce

Units Marketing builds and manages your web presence — and you control the local details.

Your Website

Every VAST brand website is built and hosted on WordPress, the world's most widely used website platform. WordPress powers a large share of the web for good reason: it's flexible, fast, SEO-friendly, endlessly extensible, and backed by a huge ecosystem of plugins and integrations — which makes it the ideal foundation for marketing-driven sites that need to evolve quickly.

Units Marketing manages and optimizes everything on the corporate pages and the backend — performance, security, SEO, integrations, and uptime — and keeps it all current. We continually add new functionality and innovation across the platform and train you on what's new during the monthly calls, so you always get the benefit without the maintenance burden.

Your Microsite

Your location's microsite is yours to control. Franchise owners have full editing access to the microsite — products, photos, descriptions of your space, e-commerce links, local blogs, and more — so you can keep local details fresh and accurate. You can reach your editing portal from your brand's resources page, along with a list of the standardized, brand-wide products available for you to feature on your site.

Manage and customize these on your microsite as needed:

- **Products & pricing:** keep your offerings and rates accurate and current.
- **Pictures:** feature real, up-to-date photos of your space.
- **Location blog:** aim to post at least once per month.
- **About our location:** these sections are standardized brand-wide but can and should be customized at the location level. For example, for your meeting rooms, add the size of your rooms, the AV available, nearby restaurants people can go to for lunch, access to the community kitchen, and the type of coffee you serve.
- **E-commerce links:** your e-commerce site is not integrated with your consumer-facing microsite, so if you make an adjustment on one, make sure you make it on the other too.

> **You own the local story**
> Use your microsite editing access to showcase what makes your location unique — real photos, local blogs, and accurate space details — while Units Marketing keeps the corporate site and backend optimized behind the scenes.

E-commerce Platforms

VAST locations sell and manage space through a variety of e-commerce solutions — such as Yardi, Flexspace, Deskworks, and others — depending on brand and market. These e-commerce platforms are completely separate systems from your microsite.

> **Update products in both places**
> Because your e-commerce platform and your microsite are separate, any change to a product — pricing, availability, descriptions, new offerings — must be made in both systems to stay consistent. Update your e-commerce platform and your microsite together every time.

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21. Getting the Support You Need

Know exactly who to go to — so questions get answered fast.

Different questions are routed to different teams. Use this guide to send each request to the right place.

Go to Your Units Account Manager for:

- Campaign-related questions
- Changes to media buy
- Questions about leads from campaigns
- Changes to campaign media or wording

Go to the Units Support Ticket System for:

Everything else — including:

- HubSpot
- Website
- Birdeye
- CallRail
- Social profiles
- Business listing profiles
- General marketing strategy questions

Go to VAST Corporate for:

- E-commerce questions and changes
- Email support
- Operations questions

Your Brand Resources Page

Each brand's resources page houses your go-to links — trainings, current organic social posts and promotions, national call playbacks, support ticket forms, and your microsite editing portal:

- **Intelligent Office:** https://intelligentoffice.com/resources/
- **Venture X:** https://venturex.com/resources/
- **Office Evolution:** https://www.officeevolution.com/resources/

22. Appendices

Templates, checklists, SOPs, and scorecards to put the playbook into action.

Supporting resources available from your Units Marketing team include:

- Onboarding checklist and asset handoff template.
- Monthly marketing review agenda and KPI scorecard.
- Content calendar and local-story prompt list.
- Broker and partner outreach scripts.
- Launch campaign plan and grand-opening checklist.
- Lead follow-up cadence and call/text/email templates.

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The VAST 9-Channel Marketing Framework

How each channel works — its purpose, what owners do, and what Units Marketing does.

Use this as a quick reference for running all nine channels. Owners execute locally; Units Marketing provides the strategy, systems, and optimization behind each one.

Channel	Purpose	Owner Actions	Units Marketing Actions
Paid Social	Reach and engage target audiences and drive demand.	Approve creative, share local angles, fund campaigns.	Build, target, and optimize paid social campaigns.
Paid Search	Capture high-intent prospects searching right now.	Set budget, review leads, follow up fast.	Manage keywords, bids, and landing pages.
Organic Social	Build community and stay top-of-mind.	Share photos, events, and member wins.	Plan calendar, create posts, and schedule.
Organic Search	Earn durable visibility in local search.	Provide local detail and gather reviews.	Optimize site, content, and technical SEO.
Referrals	Turn relationships into trusted leads.	Ask members and partners for referrals.	Provide tips and tricks on how to enlist referral sources.
Brokers & Partners	Develop a steady qualified pipeline.	Meet brokers and nurture partners.	Provide collateral, incentives, and tracking.
3rd Party Sites	Stay visible where prospects compare.	Keep info current; respond to inquiries.	N/A
Networking & Community	Build the brand through local presence.	Attend events; host and sponsor locally.	N/A
Email Marketing	Nurture leads and convert over time.	Share updates, offers, and stories.	Send one monthly national eblast to all HubSpot contacts.

Optimize all channels. Measure. Learn. Improve. Repeat.
That's how we win. A balanced, well-run mix — reviewed every month — is what drives durable growth across the VAST network.

vast

OPTIMIZE ALL CHANNELS.

MEASURE. LEARN. IMPROVE. REPEAT.

THAT'S HOW WE WIN.

A partnership between VAST franchise owners and Units Marketing — building local growth across every brand, every market.

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