**Supplemental File For: Provider and Client Matchmaking for Positive Social Impacts**

**for Voces Vitales Costa Rica**

**An Interactive Qualifying Project (IQP)**

**Submitted to the Faculty of**

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Appendices:

**APPENDIX A: Mentor Interview Questions**

(We used the interview questions listed below as a general guideline for mentor interviews. But the format of interviews was not strict to only these questions. We tried to pursue each mentors’ expertise to obtain relevant information relating to our project objectives and research questions.)

# **Goal of interviews**

Gather a comprehensive picture of provider pain points regarding freelance work for business clients.

# **Preface**

# Questions

### **Introductory**

1. Service Description: Provide a brief description of the services you offer

a. Do you provide services to individuals or businesses?

### **Difficulties and Pain-points in Practice**

#### Distinguish between BTB and BTC when recording answers.

1. Walk through your typical process of finding a new client and all the steps up to your first appointment with them
2. How do you currently market yourself? Do you face difficulties in marketing? Newsletter and social media
3. What are the current difficulties you face in creating new client relationships?

a. Do you often get repeat clients, or are they one-offs?

4. What are the difficulties you face in scheduling clients?

5. How selective are you with your new clientele?

a. What information would you want to know before accepting a new client?

6. Is your client’s location a factor for you in selecting clients or do they come to you?

7. What are the current difficulties you face in maintaining client relationships?

8. Do you run into issues with problematic clients who are angry or financially reluctant?

a. How much of a concern are security issues for you? Do you have to take steps to ensure reliability/avoid being scammed?

b. Are you paid before or after providing services?

9. What is your experience dealing with administrative tasks such as registering your business?

### **Preferences and Desired Features of a Potential Hub**

1. Do you have experience working with a 3rd party platform for managing client outreach and logistics?
2. Is a digital platform something you would be interested in incorporating into your processes? Why or why not?

a. What are the most challenging or tedious aspects of your current practice that you would hope a 3rd party platform would solve or assist with?

3. When considering the adoption of a new platform, what factors are most crucial to you?

a. Would you prioritize the flexibility of use or the ease of use when choosing a platform? If so, what specific features would you expect such a platform to have to meet your needs effectively?

4. When considering new clients, what information do you want to know?

a. Do you prefer having access to a wealth of data such as the client's reputation, background, preferences and a detailed personality profile? Or do you find a straightforward rating to be more sufficient?

5. How much control would you like to have over your profile? Would you rather it be more in-depth, or easier to set up?

a. Would assistance and advice from platform experts be valuable to you when creating a profile?

b. Would you consider investing funds in the platform in order to reach more clients?

c. Are there any profile design elements that you feel would be necessary to best represent and market yourself?

6. How much of a concern is reliability/security to you in terms of adopting a 3rd party application?

a. Are there any other potential safety features that you would like to see from 3rd party hub?

**APPENDIX B: VVCR Mentor Survey**

Section 1 of 5:

Email:

Full name:

Cell Phone:

Do you offer training and support services to people and would like to expand your customer network? or start working with enterprise customers?

* Interested
* Not Interested

Section 2 of 5:

Tell us a little more

* Description(Optional

Why are you not interested in expanding your network of enterprise customers or starting to work with enterprise customers? (you can choose more than 1 option)

* I do not offer training or support services to people
* I lack preparation to offer services to business clients
* I have enough demand for my services at the moment
* I do not want to offer my services to companies
* Other...

Section 3 of 5:

About Their Services

* Description(optional)

¿Which of the following **services** you currently have the capacity to provide? (you can choose more than 1 option)

* Training in human (soft) skills
* Mentoring
* Coaching
* Psychological therapy
* Personal finance management
* Mindfulness
* Nutrition
* Neuro-Linguistic Programming
* Yoga
* Legal services
* Personal training
* Veterinary services
* Support in sustainability, gender or diversity and inclusion
* Other...

Regarding these services, what modality can you provide? (you can choose more than 1 option)

* Talks (masters of maximum 1.5 hours)
* Workshops (theoretical and practical combination of 4 to 8 hours)
* Courses (modular programs of more than 8 hours)
* One-on-one service or consultation (individual)
* Group services
* Consulting or Advice
* Other...

In which of the following topics do you have the capacity to provide **training**? (you can choose more than 1 option)

* Leadership
* Conflict resolution
* Personal finances
* Professional development
* Personal brand
* Diversity and inclusion
* Couple/Family
* Wellness and health
* Communication
* Neuro-Linguistic Programming
* Empowerment
* Other human (soft) skills
* I do not offer training services
* Other...

To whom have you offered these services?

* To people
* To companies
* Both
* Other...

How long have you been offering your professional or training services?

* I have never offered it, but I am interested
* Less than 1 year
* From 1 year to less than 3 years
* From 3 years to less than 5 years
* From 5 years to less than 10 years
* 10 años o más

In what modality would you be available to provide your services? (You can choose more than 1 option).

* In person in my office or physical space
* In person at client offices
* Virtual

Check the languages in which you can offer your services

* Spanish
* English
* Portuguese
* Other...

From the following list, what advantages would generate the most value for you by being part of a platform that offers your services? (you can choose more than 1 option)

* Visibility and reach in the market (marketing)
* Sales management of your services
* Vital Voices Support
* Access to continuous training
* Business opportunities
* Access to the community of network professionals and events
* Support in administrative management (quotes, collection, etc.)
* Other...

What design features would appeal to you when using this platform? (you can choose more than 1 option)

* Mobile app
* In-app messaging
* In-app payment
* Schedule sessions
* Location of the place where the services are delivered
* Analysis of the effectiveness of my profile (activity, views of my profile, etc.)
* Support for detailed profiles (be able to make advertising videos, design options)
* Payment option to highlight my profile and services to do so (help in profile design and others)
* Security Guidelines/Verification/Scam Protection
* Classification or evaluation of my profile by the platform (based on my response times and activity on the platform according to the "hub's rules")
* Rating or evaluation of my profile by Customers Rating and rating of my profile (stars, testimonial, etc.).
* Possibility of evaluating clients (stars, testimonials, recommendations as a client)
* That customers can do searches based on categories/offers or companies
* That customers can do AI searches (keywords, based on navigation, Neural search, etc.)
* Access to the potential client's profile
* Other...

Would you be able to offer a free trial of your services to the Vital Voices mentoring network as part of the professional network selection process?

* Yes
* No
* I don’t know

What is your primary location?

* In the Central Valley, in Costa Rica
* Outside the Central Valley, in Costa Rica
* In Other Country
* Other...

Detail what is current occupancy status (you can choose more than 1 option)

* I am salaried
* I am independent professional
* I am a business woman
* I am a university teacher
* Pensioner
* Home duties
* Other...

Would you like to create an online course on the topics you offer?

* Yes, I already have an e-learning course
* Yes, but I have not developed it
* No, I prefer to deliver services in real time (whether virtual or in person).

This platform will connect you with potential clients looking for professionals, backed by VVCR, ensuring secure payments, security guidelines for you and the clients. To be part of this network, you will need to go through a selection and approval process to ensure the quality of your services.

Do you maintain your interest in creating an account on a hub that showcases your offer, skills, and qualifications?

* Yes
* No

How is it currently advertised? Are there any shortcomings in advertising methods you want to share?

* (Short Answer Text)

What are the main challenges you encounter in communication and customer relations?

* (Short Answer Text)

If you wish, copy here the links to its website, LinkedIn or other social networks associated with the services it offers. Or if you prefer, a description of the services you would be able to offer on this platform. (This is not a mandatory question.)

* (Long Answer Text)

Section 4 Of 5

About Prices & Rates

* Description(optional)

Do you get paid in dollars or colones?

* In Dollars
* In Colones
* Both
* Other...

On average, what is the range of your hourly rate (equivalent in colones including VAT)?

* Less than 20,000 colones
* From 20,000 colones to 40,000 colones
* From 41,000 colones to 60,000 colones
* More than 61,000 colones
* Does not apply since I am not offering services
* Other...

Would you be willing to participate in a focus group to deepen this initiative?

* Yes, in the mornings
* Yes, at the end of the afternoon
* Yes, on Saturdays
* I have no disposition

Section 5 of 5

Final thoughts

* Description(Optional)

I look forward to continuing to receive information about this initiative

* Yes
* No

Please add here any comments, recommendations, or valuable feedback that we may take into account. (This is not a mandatory question.)

o (Long Answer Text)