



The  
Concierge Academy™

## How to Scale a Concierge Business

**When is the RIGHT time to scale your “service” based business?** You’ll need to ask yourself some serious questions first:

- Do you want to expand the number of clients you work with?
- What are your ultimate income goals?
- Do you want to expand into other “local areas” (Best practice is to saturate your current marketplace unless you have a “partner” that serves another market and you can work simultaneously as GROWING both areas of the business).
- Are you willing to hire, train and fire contractors, team members or employees?
- Do you have the passion and desire to LEAD others?
- Are you ready to take a “pay cut” – growth sucks cash – up front - But THEN you need to use THAT time to continue to grow.

**How do you know it’s time to bring someone on?** It’s VERY similar to WHY our clients hire US!!

- Do you feel overwhelmed with too much to do?
- Are you struggling to manage and cover all your client needs?
- If I handed you 5 new clients, would you be able to say YES to all of them without going crazy?
- Is too much work negatively impacting your home life?
- Have you stopped marketing because you’re ‘working’ too much?

Once you've decided to hire and bring someone on INTO the business you actually have two options:

1. Scale the business and hire someone to HELP with client tasks.
2. Bring on your OWN ASSISTANT so you can focus on clients and business growth activities.

### Step by Step Process to Hiring:

- Create an "AD" for your *ideal helper*. Who are they? What's their personality type? What skill set do that have? Get REALLY clear on who you want! How many hours would they be available?
- Place your AD
  - I have had the BEST success through Facebook
  - You can use LinkedIn
  - You can use Indeed to do a search for candidates
  - Local hiring "boards"
- Be very CLEAR in your AD is to the "next step" you want them to take
- Send them a "hiring" quiz that outlines situations and ideal needs you are covering
- Use "Hoop hiring" in your Interview Process
- If they meet your needs + pass your first layer of "hoops" set up a phone interview
- Have a preform list of phone interview questions
- Get permission, then run a background check
- Schedule a face to face meeting
- TRUST your GUT AND your natural instincts
- Offer the position!

## Next Steps

(ALL THIS INFORMATION MUST be APPROVED and always discussed with YOUR Lawyer)

### Documents to have signed (have your lawyer DRAFT your documents)

- W9 Form
- Proof of Insurance (liability/auto) if applicable
- Non-Compete Clause
- Independent Contractor Agreement
- Confidentiality agreement (to cover your intellectual property AND client information)
- If an “Employee” will need payroll system

### Other tasks:

- Welcome letter
- Provide team uniform/necessary tools if needed
- Provide them with business cards with YOUR phone number/  
business line
- Add a time to your calendar to review their progress within 30 days
- Add a time in calendar to renew contract and insurance on an annual  
basis
- Assign their 1<sup>st</sup> client
- Schedule orientation based on YOUR Company philosophy



**Other things you CAN do if in line with your company culture:**

- Provide a welcome gift
- Do Strength Finders
- Do a Kolbe assessment
- Send birthday card and gift

**Administrative Tasks:**

- Add them to team calendar
- Add scheduled vacations to the team calendar
- Issue a Business Credit Card (we use Amex)
- Highlight them on Social Media
- Add them and their picture to your website introducing them