



The  
Concierge Academy™

## Technology of a Concierge Business

There are different components that will help you establish a strong foundation in your business and then there are other pieces of technology you may want to consider as you grow.

To make things easier for you to understand, I have broken down all the technology I have used or would consider using since my business started several years ago.

Please be sure not to allow technology to be a distraction from your marketing! Many times we “add in” new things as a way to become distracted from the work that really brings in the clients... The **MARKETING!!**

### Phase 1 of the business: Year 1

- Build Your Own Website
- Hosting Site: Hostgator or Bluehost (top recommended)
- Email (Gmail)
- QuickBooks (For Bookkeeping/invoice creation)
- FreshBooks comes highly recommended in our industry
- Evernote to save notes/files (for clients/self)

## Phase 2: Year 1-3

- Dropbox
- Constant Contact
- Hootsuite
- Email (Outlook)
- Asana
- Vanity Email address (forwarded into Outlook)
- Square for Credit Cards (take money on the go)
- Wordpress Website
- Plugins:
  - Akismet (keeps spam off a blog)
- Survey Monkey (for annual survey to clients)
- Toggl (time tracking)

## Phase 3: Year 3 to Present

- Essential Elements Concierge software
- Aweber (more robust CRM platform)
- Wordpress Plugin added for Lead Generation
- Paypal
- Vcita (scheduling for coaching clients)
- PNC Merchant Services Acct. (for CC payments)
- Got my first TRUE “Business CC” Amex (can easily assign each team member a new card at no additional cost)
- Google Voice (created a vanity phone number)
- Slydial (for discreetly leaving messages)

## Phase 4: Year 5/6 to present

- Slack for Team Communications
- Voxer
- Google Docs
- Zoom
- Tiny Scanner (phone app)
- Amazon Business Acct

## Other Technology we have used or do use:

- Free Conference Call.com
- Skype
- Rev (for transcribing long content)

## New technology we will be adding on THIS year:

- 1Password
- DocuSign
- CRM
  - Insightly
  - Less Annoying CRM
  - Vcita

## Technology Tools Index

### Evernote

You may already be familiar with Evernote, but Evernote makes a great resource for when you want to collectively capture and record ideas, blog post ideas, marketing ideas, anything that you don't want to lose. The only downside to Evernote is if you're not used to using technology to dump your brain into, you may FORGET you have all this amazing information collected and categorized! In the beginning, I used to use Evernote often for tracking new clients, their needs, their likes and their dislikes. This way I always had access to their information when I was on the go.

### Slack

Slack is communication tool that can literally eliminate email within a “team” setting. It allows you to keep in touch with everyone and it even can connect to other tools if you use lots of online tools. Stay focused by keeping topics separate and by setting up private communication channels.

**For ex: We have several channels set us such as:**

- Team assignments
- Weekly Huddle
- Team Pics
- Magical Moments
- Bookkeeping
- Receipts
- Team Pics

Plus it's free 😊

## Asana

Asana is a project management tool. We use it often with tracking clients, clients that need to be booked, client projects and even HOT leads. When we have clients that have long lists of ongoing needs and projects, we house all that information in ASANA. Most importantly, we used Asana to create all the systems within Task Complete. Within Asana you can communicate, share links, stay on top of deadlines and keep everyone in the loop. It's great for SETTING deadlines and holding yourself and team accountable.

## Essential Elements/Concierge Business Solutions

[info@conciergebusinesssolutions.com](mailto:info@conciergebusinesssolutions.com)

### Top features:

- Activity reports that automatically alert your clients when tasks are complete
- Online time entry by your employees
- Task Management module to create, modify, complete tasks with visibility by employee or client
- Automated time cards
- Ability to track mileage and reimburse mileage costs for your employees and/or charge mileage costs to your clients
- Automated time tracking with visibility to which accounts need to be charged for more time
- *Full transparency for your clients* - they can view their task completions, hours logs and a status of their account
- Clients can request tasks through the software - everything is automated



## **Aweber - Email Marketing**

Grab FREE PDF on what to write in your emails:

<http://www.aweber.com/whattowrite.htm?id=455662>

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