



# THE COMPANY.

BUILD YOUR LUXURY CONCIERGE  
COMPANY.

BY THE CONCIERGE HUB

# What this is and who it is for.

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This is not a manual about what luxury concierge is. There is an entire library of other guides for that. This manual is about what it takes to build a luxury concierge company, from your first client to a structured business that generates real, consistent income.

It is also not a manual full of legal disclaimers and generic business advice. Legal requirements vary by country, by structure and by scale. What does not vary is the logic of how to build something valuable in this profession, and that is what we focus on here.

Whether you are starting from zero and wondering how to even frame your first service offer, or you already have a few clients and want to understand how to structure, price and scale properly, this manual has something for you. It is built from real experience, real mistakes and real client relationships in the luxury concierge world.

Work through it in order if you are at the beginning. Dip into specific sections if you are further along. Either way, take notes. The most important insight is always the one you apply.

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## *Lucia*

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## SECTION 01

## The Real Opportunity

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*Why this market exists, why it is growing, and why most people have not found it yet.*

The luxury concierge market is not a niche within the service industry. It is a response to a fundamental reality: the wealthiest people in the world have more demands on their time than they have time to meet them. They need trusted people who can manage the complexity of their lives at a standard they actually expect. And there are almost no formal pathways for becoming one of those people.

That is the opportunity. Not just in the obvious markets like London, Dubai or New York. Everywhere that wealth exists and time is scarce. Which is everywhere.

### THE NUMBERS BEHIND THE OPPORTUNITY

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- **22.8 million HNWIs globally and growing**

High-net-worth individuals with at least \$1 million in investable assets. Each one is a potential client, directly or through referral. The population grew 5.1% in 2023 alone.

- **\$83.5 trillion changing hands by 2048**

The great wealth transfer from one generation to the next is already underway. The new generation of wealthy clients is younger, more globally mobile, and more open to premium service relationships than their parents.

- **78% of ultra-wealthy consider concierge services essential**

Not nice to have. Essential. The demand is confirmed, documented and growing. The supply of truly excellent concierge professionals is not keeping pace with it.

- **The profession is still largely unknown**

This is not a weakness. It is the single most significant business opportunity. You are entering a market with genuine, documented demand and almost no competition at the level of quality this market actually wants.

#### LUCIA'S INSIGHT

- *The wealthiest clients are not looking for the cheapest option. They are looking for the best. Price yourself accordingly from the beginning.*
- *The market for luxury concierge services is genuinely global. A client in Singapore has the same needs as a client in London. Build with that in mind.*
- *The profession's obscurity works in your favour as a business builder. You are not competing with thousands of established providers. You are defining the standard in a market that is still forming.*

# Business Models That Work

*The different ways to structure a luxury concierge company, and which ones generate real income.*

Before you decide what to call your company or what your logo looks like, you need to decide how your business actually makes money. There are several models that work in luxury concierge. Each has different income characteristics, different client relationships and different operational demands. Understanding them clearly before you commit to one will save you an enormous amount of time and frustration.

## ● The membership model

Clients pay a recurring monthly or annual fee for access to your service. This is the model used by the major concierge companies and it is the most scalable. The income is predictable, the client relationship is ongoing, and the longer a client stays, the more profitable they become. The challenge is that membership models require clear service definitions, professional onboarding and the infrastructure to deliver consistently.

**Pricing range:** *Monthly retainers from \$500 to \$5,000 per client. Annual memberships from \$5,000 to \$50,000 for premium tiers.*

## ● The project model

Clients engage you for a specific scope of work. A relocation. A major event. A property setup. A trip. You deliver the project and the engagement ends, unless renewed. This model is easier to start with because it does not require the infrastructure of a full membership service. The challenge is that income is irregular and client acquisition is constant.

**Pricing range:** *Project fees from \$1,500 to \$25,000 depending on scope and complexity.*

### ● The hybrid model

A combination of project work and ongoing retainers. You start with a project, deliver exceptional results, and the client converts to a retainer. This is how most solo concierges naturally evolve and it is one of the most sustainable paths to consistent income.

**Pricing range:** *Entry project fee plus ongoing monthly retainer. The project builds trust; the retainer builds income.*

### ● The corporate model

You provide concierge services to a corporate client for their executives, clients or employees. The fees are paid by the company rather than individuals. This model generates larger invoices and more stable contracts but often less interesting work at the individual request level.

**Pricing range:** *Corporate contracts from \$2,000 to \$20,000 per month depending on volume and scope.*

### ● The white label model

You operate as a concierge service behind another brand. A private bank, a luxury hotel group, a real estate developer. You deliver the service under their name. This provides volume and stability but limits your ability to build your own brand.

**Pricing range:** *Usually fee-per-request or monthly retainer with the corporate client. Individual fees are often standardised.*

#### LUCIA'S INSIGHT

- *Start with the hybrid model. One or two project clients that convert to retainers is the most natural and least risky path into a stable concierge business.*
- *The membership model is where the real income lives, but it requires that you have already demonstrated your value. Build the evidence before you build the membership.*
- *White label work is often dismissed as unglamorous. Done well, it generates significant income while you build your own brand and client base in parallel.*

# Who Your Clients Are

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*The different types of HNWI clients and what each one actually needs from a concierge company.*

One of the most common mistakes in building a concierge business is treating all wealthy clients as the same. They are not. A self-made entrepreneur in their forties has very different needs from a second-generation wealth inheritor in their sixties. A corporate executive needs different things from an ultra-wealthy family with properties in five countries. Knowing your client types well determines everything from how you price to how you communicate.

- **The time-poor executive**

Typically in their 40s to 50s, high income, demanding corporate role. Travels frequently, needs seamless logistics, has high standards and very little patience for inefficiency. Values discretion, speed and reliability above everything. This client type is the most common entry point for new concierge businesses and the most responsive to clear, efficient service. They will refer you if you impress them, and they know exactly how to evaluate whether you are genuinely good.

- **The HNWI family**

A couple or family with significant assets, often multiple properties, children in private schools and a complex lifestyle that requires coordination across many areas simultaneously. These clients need in-house management, travel planning, event coordination and often staff management. They are higher maintenance than solo clients but the engagement is deeper and longer lasting. A family that trusts you is a client for years, often decades.

- **The ultra-wealthy individual**

Net worth of \$30 million or more. Often has a family office, a personal assistant and a household manager. They are not looking for someone to manage their calendar. They are looking for someone who can handle the requests that fall outside their existing infrastructure, the unusual, the complex, the deeply personal. This client pays the highest fees and has the highest expectations. Winning one is a business-changing event.

- **The relocating client**

Someone in the process of moving country, establishing a new base or managing multiple residences across different jurisdictions. This client often has an immediate, urgent and well-defined scope of need. They are one of the most lucrative project clients in concierge precisely because the scope is large, the timeline is clear and the stakes are high enough that they will pay for genuine expertise.

- **The corporate client**

A company that wants concierge services for its executives, clients or as a staff benefit. These clients are often easier to acquire than private HNWI clients because you are selling through a procurement or HR function rather than building a personal relationship. The fee negotiation is more formal, the service is more standardised, and the volume can be significant.

- **The luxury real estate client**

Property developers, real estate agencies and luxury rental platforms that want to offer a concierge service to buyers, renters or property owners. This is a partnership model rather than a direct client relationship, but it can generate significant volume with a single commercial agreement.

**LUCIA'S INSIGHT**

- *Do not try to serve all client types at once when you are starting. Choose the one or two that align most naturally with your existing network and experience, and build your initial reputation there.*
- *The self-made entrepreneur is often the easiest entry point. They understand value, they have high standards, and they are accustomed to paying for expertise. They are also much more likely to refer you than inherited wealth clients, who tend to guard their service relationships more carefully.*
- *Corporate clients provide volume. Private clients provide margin. The best businesses have both.*

# Companies That Built It

*Real case studies from the world's leading luxury concierge companies.*

The best way to understand what is possible in this business is to look at the companies that have already built it at scale. Each of the following companies started with a version of what you are building right now. A person, a service offer, and the conviction that there was a better way to serve wealthy clients than what existed in the market.

## CASE STUDY

### Quintessentially

<b>Founded / origin</b>	Founded in London in 2000 by Ben Elliot, Aaron Simpson and Paul Drummond.
<b>Business model</b>	Global lifestyle membership concierge. Annual membership fees across multiple tiers. Expanded into brand consulting, events and property.
<b>Scale today</b>	Over 60 offices globally. Tens of thousands of members. One of the most recognised luxury concierge brands in the world.
<b>Key lesson</b>	They identified that wealthy people wanted a relationship, not a transaction. They built the brand before they had significant scale and the brand attracted the clients.

## CASE STUDY

### The Ten Group

<b>Founded / origin</b>	Founded in London in 1998 by Alex Cheatle and Andrew Long.
<b>Business model</b>	B2B concierge model. Services delivered as a benefit through private banks, credit card companies and employers. Also has a direct membership offer.
<b>Scale today</b>	Operates in over 20 countries. Powers the concierge benefit for many of the world's leading private banks and premium credit card programmes.
<b>Key lesson</b>	The B2B model gave them volume and stability while they built operational excellence. They did not start with thousands of private members. They started with corporate contracts.

## CASE STUDY

### Velocity Black

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<b>Founded / origin</b>	Founded in London in 2014 by Zia Yusuf and Adrian Farina.
<b>Business model</b>	Technology-first lifestyle membership. App-based concierge with human fulfilment. Premium membership with strict entry requirements.
<b>Scale today</b>	Raised significant venture funding. Acquired by Capital One in 2023 for a reported \$250 million.
<b>Key lesson</b>	They understood that the next generation of wealthy clients wanted technology and human expertise combined. They built the tech infrastructure first and the concierge service on top of it. The acquisition validates the model completely.

## CASE STUDY

### John Paul

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<b>Founded / origin</b>	Founded in Paris in 2008 by David Amsellem.
<b>Business model</b>	B2B concierge for luxury brands, private banks and large corporations. One of the largest concierge operators in Europe.
<b>Scale today</b>	Tens of thousands of clients across Europe and beyond. Acquired by AccorHotels group, giving them access to one of the world's largest hospitality networks.
<b>Key lesson</b>	Geographic focus mattered. They built deeply in France and Europe before going global. Deep local knowledge is a competitive advantage that large global operators cannot easily replicate.

## LUCIA'S INSIGHT

- *Every one of these companies started with a single client, a clear value proposition and the willingness to learn from every engagement.*
- *None of them built a perfect product before they launched. They launched, they learned, they iterated.*
- *The B2B model is underestimated by most people starting in concierge. A single corporate contract can be worth more than twenty individual memberships.*
- *Technology is increasingly important, but the relationship is still the product. The companies that forget this eventually lose to the ones that do not.*

## SECTION 05

## Positioning and Naming

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*How you present yourself before you have a single client.*

Your positioning is the answer to a question every potential client asks before they ever contact you: why should I trust this person with my life? The answer is built from three things: who you are, what you uniquely understand, and what you have done. If you are just starting, one of those three is missing. Your job is to fill that gap credibly and quickly.

### NAMING YOUR COMPANY

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Your company name should do one of two things: signal quality and sophistication, or be so clean and simple that it carries whatever meaning you bring to it. The following principles will save you a lot of second-guessing.

- **Avoid generic descriptors**

Names like 'Premium Concierge Services' or 'Elite Lifestyle Management' signal nothing specific and are forgotten immediately. They also suggest a company that has not thought hard enough about what it actually is.

- **Consider using your own name**

In luxury services, personal brands carry significant weight. A company called 'Lucia Concierge' or simply 'Lucia' signals that a real person with real expertise is behind the service. This works particularly well in the early stages when your personal reputation is your most valuable asset.

- **Test it in the language of your primary market**

If you are targeting English-speaking HNWI clients, your name should be natural and easy to remember in English. If you are targeting Spanish-speaking markets, the same principle applies. Names that work in one language sometimes have unintended meanings in another.

- **Check availability everywhere before you commit**

Domain name, Instagram handle, LinkedIn company page, trademark in your primary market. Do this before you fall in love with a name. Discovering that your ideal name is unavailable after you have already used it on printed materials is an expensive lesson.

### YOUR POSITIONING STATEMENT

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A positioning statement is not your tagline. It is the internal compass that guides every decision about what you offer, who you serve and how you communicate. It should answer three questions in two sentences or less.

- **Who do you serve?**

Be specific. 'Wealthy individuals' is not specific. 'HNWI families relocating to Southern Europe' is specific.

- **What do you do for them?**

The outcome, not the activity. Not 'I manage your calendar' but 'I remove the complexity from your daily life so you can focus on what matters.'

- **Why you and not someone else?**

Your specific background, your specific network, your specific expertise. What do you know or who do you know that others in this space do not?

**LUCIA'S INSIGHT**

- *You do not need a perfect brand to start. You need a clear enough position that the right clients recognise themselves in your description of who you serve.*
- *The most powerful positioning in this market is specificity. The concierge who says 'I specialise in luxury family relocations to Europe' will attract that client faster than the one who says 'I offer comprehensive lifestyle management services.'*
- *Your positioning will evolve. Do not agonise over getting it perfect. Start with something honest and specific, and refine it as you learn who your best clients actually are.*

# Your First Service Offer

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*What to sell, how to package it and what to leave out.*

The biggest mistake new concierge businesses make is trying to offer everything before they are equipped to deliver anything at a truly exceptional standard. Your first service offer should be narrow enough that you can deliver it brilliantly, and valuable enough that the right client will pay a meaningful fee for it.

## THE THREE-TIER OFFER STRUCTURE

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Structure your services in three tiers from the beginning. This gives clients clear options, allows you to upsell naturally and creates a price anchor that makes your mid-tier feel like the obvious choice.

- **Entry tier: the project or starter engagement**

A defined scope, a fixed fee, a clear deliverable. This is how most new clients begin. A specific trip, a specific event, a specific search. Low risk for the client. Good opportunity for you to demonstrate your value. Examples: travel planning for a two-week trip, event coordination for a private dinner, property search support for a rental in a new city.

- **Mid tier: the monthly lifestyle retainer**

An ongoing monthly fee for a defined level of support. This is where your recurring income lives. The scope should be clear: how many requests per month, what categories of service are included, what is billed additionally. This is the tier most clients who loved a project engagement will naturally move into.

- **Premium tier: full lifestyle management**

Comprehensive support across all areas of the client's life. Household, travel, events, staff, family logistics. Bespoke pricing based on the client's specific situation. This tier is relationship-based, not scope-based, and the fee reflects the depth of access and the complexity of the engagement.

## WHAT TO INCLUDE IN YOUR FIRST OFFER

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- **Include what you can already do brilliantly**

Do not include services you cannot yet deliver at the standard this market expects. A mediocre restaurant booking is worse than no restaurant booking. Start with what you genuinely know.

- **Include a response time commitment**

HNWI clients judge your reliability partly by how quickly you respond. Committing to a specific response time, 30 minutes during business hours is standard at the premium level, and delivering on it consistently, is one of the fastest ways to build trust.

- **Include a clear communication channel**

One channel, agreed upfront. WhatsApp is the standard in most markets. Email for formal correspondence. Never leave it ambiguous.

- **Exclude what you are not ready for**

If you do not yet have a strong medical specialist network, do not include healthcare coordination in your first offer. If you have not managed household staff before, do not promise staff management. You can add these as you build the capability and the network.

#### LUCIA'S INSIGHT

- *A simple, well-delivered service is worth infinitely more than a comprehensive one poorly delivered. Start narrow. Expand as you prove your quality.*
- *Your first offer does not need to be perfect. It needs to be honest, specific and priced in a way that reflects genuine value. You will refine it after your first three clients.*
- *Every client interaction in the first six months is market research. Pay attention to what they actually ask for versus what you offered. The gap between the two is often your best growth opportunity.*

## SECTION 07

# Pricing That Works

*How to charge, what to charge, and when to charge more.*

Pricing is the area where most people in luxury concierge leave the most money on the table. Either because they are afraid to charge what the service is actually worth, or because they have not thought through all the ways they can and should be generating income from each client relationship.

## THE PRICING TABLE

SERVICE	FROM	TO	MODEL
Initial consultation	\$0	\$500	Fixed / sometimes free
Destination consultation	\$300	\$1,500	Fixed fee
Entry project fee	\$500	\$3,000	Fixed fee
Monthly lifestyle retainer	\$500	\$5,000	Monthly recurring
Annual lifestyle membership	\$5,000	\$50,000	Annual recurring
Travel planning (per trip)	\$300	\$2,500	Fixed fee
Event coordination	\$500	\$5,000	Fixed or % of budget
Full relocation management	\$3,000	\$25,000	Project fee
Household setup	\$1,000	\$8,000	Project fee
Corporate concierge	\$2,000	\$20,000/mo	Monthly contract
1:1 consultancy session	\$150	\$500/hr	Hourly
School search and placement	\$800	\$3,500	Fixed fee
Staff sourcing coordination	\$500	\$2,000	Fixed fee

## PRICING PRINCIPLES

### ● Start higher than feels comfortable

The most common pricing mistake in luxury concierge is starting too low. Low prices in a premium market do not attract more clients. They attract the wrong ones. Start at a rate that makes you slightly uncomfortable and see what happens. You will be surprised.

- **Never discount your retainer rate**

Discounting a retainer sets a precedent that is extremely difficult to reverse. If a client cannot afford your rate, they are not yet the right client. If you want to accommodate them, offer a reduced scope rather than a reduced rate.

- **Charge for your time, not just your output**

The hours you spend researching, coordinating, problem-solving and being available are part of what the client is paying for. A rate that only reflects the visible output undervalues the invisible infrastructure that makes the visible output possible.

- **Review and raise your rates annually**

Minimum 10% per year on retaining clients. If you are consistently delivering above expectation, 20% is appropriate and most clients who value the relationship will accept it without complaint. Those who do not are telling you something important.

- **Charge a deposit before any significant work begins**

30 to 50% upfront on project fees. Monthly retainers billed in advance. This protects you, creates client commitment, and is standard practice at this level of service.

#### LUCIA'S INSIGHT

- *The client who asks for a discount before you have even started is telling you exactly what kind of client they will be throughout the relationship.*
- *If you are consistently fully booked, your prices are too low. The right price is the one at which you have a small but sustainable waitlist.*
- *Luxury clients do not buy on price. They buy on trust, quality and the confidence that you can deliver what they need. Your price is a signal of all three.*

# Commissions and Vendor Revenue

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*The income streams most concierges never use, and how to use them properly.*

Your client fees are one income stream. Vendor commissions are another. Done transparently and ethically, commission income can add 20 to 40% to your total revenue without adding a single new client. Done opaquely, it destroys trust and can end your business. The difference between the two is disclosure.

## HOW VENDOR COMMISSIONS WORK

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When you refer a client to a vendor and that vendor generates revenue, many suppliers will pay you a commission on that referral. This is standard practice across hospitality, travel, events and luxury goods. The supplier is paying you for bringing them a qualified, high-value client they would not have found otherwise. You are paying them for the service your client needs. Both parties benefit.

- **Hotel and accommodation commissions**

10 to 15% of the room rate is standard for bookings made through concierge or travel trade channels. For extended stays or high-value bookings, some properties will negotiate higher rates. To access these rates, you need to register as a trade partner with the hotel or hotel group. This is free to do and takes a week or two to process. Start with the brands your clients use most.

- **Private jet and charter commissions**

Charter brokers typically pay 10 to 15% of the charter fee to referring concierges. On a \$30,000 charter, that is \$3,000 to \$4,500 for making a single introduction. Build relationships with three or four trusted brokers and register as a referral partner. Always vet operators before referring clients.

- **Luxury car hire**

10 to 15% of the hire fee. In major cities, premium car hire for a week can run to \$5,000 or more. Referral income from a single client across a year of regular car hire adds up significantly.

- **Yacht charter commissions**

5 to 10% of the charter fee, which on a superyacht charter can represent tens of thousands of dollars from a single referral. Build relationships with specialist yacht brokers rather than general platforms.

- **Event tickets and hospitality packages**

10 to 20% on premium event access and hospitality packages. Some specialist access companies work exclusively through concierge referrals and the commission structure reflects that.

- **Restaurant referral programmes**

Less common but growing. Some premium restaurants in major cities offer referral fees or credit to concierge professionals who bring regular business. Worth enquiring about at the restaurants you use most frequently.

- **Luxury goods and specialist services**

Personal shoppers, art advisors, specialist sourcing companies. Commission structures vary but typically range from 5 to 15% of the transaction value. Always declare these to the client.

## TRANSPARENCY IS NON-NEGOTIABLE

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Every commission arrangement must be disclosed to your client. This is both an ethical requirement and a practical one. A client who discovers undisclosed commissions will not simply be disappointed. They will feel deceived, and they will tell people. The disclosure does not need to be complicated. A simple statement in your contract or engagement letter that you may receive referral commissions from suppliers, and that these do not affect your recommendations, is sufficient and professional.

### LUCIA'S INSIGHT

- *Commission income is not a compromise of your service. It is a legitimate part of the business model of every professional in this industry, including the major companies.*
- *The vendor relationships that generate commission are often the same ones that provide the access and reliability your clients depend on. Building them is not just about income. It is about service quality.*
- *Track every commission carefully. Know what you are owed from each supplier. Payment is not always automatic, and some suppliers need reminders.*
- *Never let commission income influence a recommendation that is not genuinely right for the client. One bad referral for the sake of a commission fee will cost you far more than the commission was worth.*

## SECTION 09

# Contracts and Scope

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*What goes in writing before anything else happens, and why it protects both of you.*

A contract in luxury concierge is not a sign of distrust. It is a sign of professionalism. The most sophisticated clients expect one. It protects both parties, clarifies expectations before misunderstandings can develop, and gives you something to refer back to when the scope of work starts to expand beyond what was originally agreed.

## CONTRACT TYPES

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### ● The project agreement

Used for a defined piece of work with a start, an end and a clear deliverable. Includes scope, fee, payment terms, what happens if the project expands beyond scope, and your cancellation and refund policy. Simple, one to two pages is sufficient.

### ● The retainer agreement

Used for ongoing monthly or annual engagements. Includes the scope of services included in the retainer, the monthly fee, payment terms, what is billed additionally, the notice period for either party to terminate, and your confidentiality obligations. This is your most important document.

### ● The NDA

A non-disclosure agreement signed before any sensitive client information is shared. For HNWI clients this is expected and often their legal team will have their own version. Be prepared to sign theirs as well as provide your own.

### ● The vendor agreement

A brief agreement or email confirmation with each supplier you work with regularly, confirming the commission structure, payment terms and any exclusivity arrangements. Prevents misunderstandings that are surprisingly common even with well-established suppliers.

## ESSENTIAL CONTRACT CLAUSES

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### ● Scope definition

Exactly what is included. Exactly what is not.

### ● Additional services

How additional requests outside the defined scope are billed. Hourly rate or fixed fee per request.

### ● Response time commitments

What the client can expect and when.

- **Payment terms**

When fees are due, how they are paid, what happens if payment is late.

- **Confidentiality**

Your obligations regarding the client's personal and financial information.

- **Commission disclosure**

That you may receive referral commissions from suppliers.

- **Liability limitation**

You are a coordinator, not an insurer. Your liability for third-party failures is limited.

- **Termination**

How either party can end the relationship, what notice is required, and whether any fees are refunded.

#### LUCIA'S INSIGHT

- *Get your retainer agreement reviewed by a local lawyer once. It is a one-time investment that protects every future engagement.*
- *The scope definition is the most important clause in any concierge contract. If it is vague, you will spend time doing things you are not being paid for, or having uncomfortable conversations about what was and was not included.*
- *A client who refuses to sign any kind of written agreement is a client who has not thought seriously about the professional relationship they are entering. Proceed with caution.*

## SECTION 10

## Getting Your First Clients

*The channels, conversations and strategies that actually work.*

The first three clients are the hardest to find and the most important to keep. They are the foundation of your reputation, your first source of referrals, and your best teachers about what your business actually is versus what you thought it would be.

### CHANNELS THAT ACTUALLY WORK

#### ● Your existing professional network

The fastest and most overlooked channel. Every person in your existing professional network is either a potential client, a potential referral source, or a potential partner. Contact each of them directly, explain what you are building, and ask if they know anyone who might benefit from what you offer. One conversation a day for 30 days will almost certainly generate your first client.

#### ● LinkedIn

The most underused platform in luxury concierge. A well-written LinkedIn profile that clearly articulates what you do and who you serve will attract inbound enquiries from corporate clients, private banks and wealth managers who are looking for concierge solutions for their clients. Post content about the profession weekly. Engage with wealth management, private banking and luxury hospitality communities.

#### ● Partnerships with adjacent professionals

Private bankers, wealth managers, family offices, luxury real estate agents, immigration lawyers. These professionals interact with HNWI clients daily and often face requests they cannot fulfil themselves. Position yourself as the person they refer to when a client needs lifestyle support. One strong referral partnership with a private banker can be worth more than any marketing campaign.

#### ● Instagram

A powerful platform for building your company's brand and attracting HNWI clients, corporate partners and referral sources. A consistent, high-quality presence that reflects the luxury world you operate in builds the credibility that makes word-of-mouth referrals significantly more effective.

- **Upwork and freelance platforms**

A legitimate early-stage channel that most people dismiss out of perceived lack of glamour. HNWI clients do use these platforms, particularly for project-based work. It builds your portfolio, your reviews and your understanding of what clients actually need before you invest in building a more premium-positioned brand.

- **Luxury residential developments and hotel partnerships**

Property developers, five-star hotels and luxury serviced apartment operators often want to offer a concierge service to their residents or guests but do not want to build it themselves. Approaching them with a white label offer is one of the fastest ways to generate volume early without doing individual client acquisition one by one.

**LUCIA'S INSIGHT**

- *The first client conversation is rarely a sales conversation. It is a listening conversation. Ask more than you tell. Understand the problem before you propose a solution.*
- *Referrals from satisfied clients are the highest-converting source of new business in luxury concierge. Focus almost all of your early energy on making your first clients so happy that they cannot help but tell people.*
- *Every professional relationship you build, from the hotel concierge you chat with to the immigration lawyer you refer a client to, is a potential future referral source. Treat every professional interaction as an investment.*

## SECTION 11

# Day to Day Operations

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*How to manage requests, time and multiple clients without losing your mind or your standards.*

The operational reality of running a luxury concierge business is less glamorous than the service looks from the outside. It is early mornings, last-minute changes, simultaneous demands from multiple clients, and the constant pressure of maintaining a standard that leaves no visible effort. The only way to do this sustainably is with systems, boundaries and the discipline to use both.

## DAILY OPERATIONS FRAMEWORK

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- **Morning review: 7 to 8am**

Review all active client requests, confirm any bookings from the previous day, check for any overnight communications requiring response. Send proactive updates to clients with active engagements. Flag anything time-sensitive.

- **Active fulfilment: 8am to 12pm**

Your primary working window for research, sourcing, bookings and coordination. Most vendors and suppliers are reachable during this time. Schedule all external calls in this window where possible.

- **Client communications: 12 to 2pm**

Follow up on open requests, provide updates, respond to new enquiries. If you have multiple clients, create a brief daily summary for each one with any relevant updates. Clients who hear from you proactively are significantly more satisfied than those who have to chase.

- **Administration: 2 to 4pm**

Invoicing, vendor payments, commission tracking, contract management, calendar management for upcoming client needs. This is also the time to research and build your network, not when a client has an urgent request.

- **Emergency availability: 4pm to 9pm**

For active retainer clients, same-day availability for urgent requests is expected. Set clear boundaries around what constitutes an emergency and communicate them in your contract. A dinner reservation for next week is not an emergency. A client stranded at an airport is.

## MANAGING MULTIPLE CLIENTS

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- **Separate everything by client**

Separate folders, separate WhatsApp conversations, separate supplier contact lists where possible. The risk of sending information intended for one client to another is real and catastrophic. Build your system to make this impossible, not just unlikely.

- **Use a task management system**

Notion, Asana, or any equivalent. Every open request should be logged with a due date and a status. The moment a request lives only in your memory, it is at risk of being forgotten.

- **Set clear response time expectations**

And meet them consistently. If you commit to a two-hour response time, a three-hour response is a broken promise. If you know you will be unavailable, communicate this to active clients in advance, not after they have been waiting.

- **Know when you are at capacity**

Taking on more clients than you can serve at your standard is not growth. It is the fastest way to damage the reputation you have been building. Build a waitlist before you build a team.

**LUCIA'S INSIGHT**

- *The most efficient concierges are the ones with the best systems, not the most time. Build your systems before you need them.*
- *Batch similar tasks together. All restaurant research in one sitting. All travel bookings in one window. Context switching is the enemy of efficiency at this level of work.*
- *Your most important operational asset is your supplier contact list. Maintained, updated and personal. Guard it accordingly.*

# Client Communication Standards

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*How to communicate in a way that builds lasting trust.*

In luxury concierge, how you communicate is as important as what you do. The most efficient resolution of a complex request, delivered in the wrong tone or at the wrong time, still leaves a client feeling slightly off. The right communication style is not performative. It is genuinely considered, genuinely responsive and genuinely personal.

- **Match their style, not yours**

If they send brief WhatsApp messages, be brief. If they prefer detailed email updates, provide them. If they use voice notes, learn to love voice notes. Communication is a service, and the right format is the one the client is most comfortable with.

- **Close the loop without being asked**

The most common cause of client dissatisfaction in concierge is not a failed request. It is silence. If you are working on something, tell the client it is in progress before they wonder. If something changes, tell them before they discover it. Proactive communication is the single most powerful trust-builder in this profession.

- **Be solution-first in every communication**

Never deliver a problem without a solution. 'The restaurant has cancelled' is a problem. 'The restaurant has cancelled, but I have already secured a table at X, which I think you will love equally, and I can send you the details now' is concierge service. The client should never have to solve a problem you are presenting to them.

- **Respond within your committed time, always**

If you cannot respond substantively within your committed window, acknowledge the message and give a specific time when you will have an answer. Silence communicates disorganisation. A brief acknowledgement communicates control.

- **Be precise with language**

In luxury service, vague language erodes confidence. 'I will try to arrange that' is less reassuring than 'I am arranging that now and will confirm by 5pm.' Precision in language signals precision in execution.

- **Know when to call instead of message**

For complex situations, sensitive matters or anything where tone could be misread in text, call. A two-minute phone call resolves in real time what a ten-message thread sometimes cannot.

#### LUCIA'S INSIGHT

- *Every communication is a moment of trust-building or trust-eroding. There is no neutral message.*
- *Spelling errors and grammatical mistakes in client communications are more costly in this profession than in almost any other. The client who pays \$3,000 a month expects perfect written communication. Check everything before you send.*
- *The best concierges communicate as if the client is the only client they have. Even when they are managing ten others simultaneously.*

# Partnerships and Vendor Network

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*The relationships that make your service possible and your business defensible.*

Your vendor network is not just a list of suppliers. It is your competitive advantage. Anyone can find a hotel online. Not everyone can call the general manager directly and have a client's preferences pre-loaded before they arrive. That gap, between what is publicly accessible and what is accessible through genuine relationships, is where your real value lives.

## BUILDING PARTNERSHIPS BY CATEGORY

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### ● Hospitality partnerships

Register as a trade partner with the hotel groups your clients use most. Four Seasons, Aman, Rosewood, Mandarin Oriental, Belmond. Each has a trade or travel professional programme that gives you access to preferred rates, commission, and most importantly, a direct line to their concierge and guest relations teams. Build personal relationships within these teams. The hotel concierge who knows your name and your standards is worth more than any booking platform.

### ● Private aviation partnerships

Build relationships with three to four charter brokers who specialise in the size and type of aircraft your clients typically use. Do not use a single broker exclusively. The market is volatile and availability varies. Having multiple trusted relationships means you can always find a solution. Brokers pay commission on referrals, typically 10 to 15% of the charter fee.

### ● Ground transportation

In every city where your clients spend time, identify and build a relationship with a premium chauffeur company or individual driver. Not just a name in a contact list. A direct relationship where they know your standards, your clients' preferences and understand what you need from them. These relationships take time to build and are extremely valuable once in place.

### ● Events and access specialists

Companies and individuals who specialise in premium access, sold-out events and private experiences. These are niche relationships that take time to develop. Start by identifying which events your clients are most interested in and build backward from there. Who sells access to Wimbledon hospitality? Who can get Formula One paddock passes? Who opens doors to private fashion week events?

- **Lifestyle service specialists**

Private chefs, personal trainers, wellness practitioners, beauty professionals, stylists. In each city where you operate, build a vetted network of the best practitioners in each category. Vet for discretion and quality equally. A massage therapist who is exceptional but indiscreet is not a safe referral for an HNWI client.

- **Professional service partnerships**

Immigration lawyers, international tax advisors, private bankers, wealth managers, family office administrators. These professionals interact with your ideal clients daily. Position yourself as the lifestyle management partner they can refer to when their clients need support that falls outside their professional scope. A single introduction from a private banker can be worth a year of marketing spend.

## HOW TO APPROACH A POTENTIAL PARTNER

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The wrong approach is asking what they can do for you. The right approach is demonstrating what you can do for them. Every partnership should be framed as a mutual value exchange from the very first conversation.

- **Research before you reach out**

Know who you are contacting, what their business does and why a relationship with you would be valuable to them specifically.

- **Lead with what you bring**

The clients you work with, the volume you can refer, the calibre of the introductions you make. Make the value clear immediately.

- **Start with a small test**

Before committing to a formal partnership, do a trial referral. See how they handle it. Whether they communicate with you during the engagement and whether they follow up afterward. Partnership quality is demonstrated, not promised.

- **Follow up after every referral**

Tell the partner how it went. Thank them if it went well. Address it directly if it did not. This is how professional relationships deepen over time.

### LUCIA'S INSIGHT

- *A vendor who consistently delivers at the standard your clients expect is more valuable than a cheaper alternative that occasionally disappoints.*
- *Exclusive arrangements with vendors can be valuable but are rarely necessary. Transparency and mutual respect are more durable foundations for partnership than exclusivity clauses.*
- *Your vendor network is one of the hardest things about your business to replicate. It is built over years. Guard it accordingly. Do not share your best contacts with people who have not yet earned the referral.*

# Contingency and Crisis Management

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*What to do when things go wrong, how to respond, and what never to say.*

At some point in a concierge business, something will go wrong. A flight will be cancelled. A villa will fail to meet expectations. A restaurant will lose a reservation. A supplier will let you down at the worst possible moment. The clients who stay with you for years are almost never the ones who never experienced a problem. They are the ones who saw how you handled a problem when it happened.

## THE CRISIS RESPONSE FRAMEWORK

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- **Acknowledge before you solve**

The first thing a client needs when something has gone wrong is to feel heard. 'I understand, and I am on it' is more reassuring in the first moment than a detailed explanation of what you are doing to fix it. Acknowledge. Then solve.

- **Never present a problem without a solution**

Every communication during a crisis should include what you are doing, what you have already arranged as an alternative, or what the client's options are. A problem delivered without context or solution is just bad news. A problem delivered with an immediate alternative is a demonstration of capability.

- **Contact the supplier directly before contacting the client**

If a supplier has let you down, try to resolve it before the client knows there was an issue. Many problems can be solved in the time it would take to inform the client. If you cannot resolve it, tell the client what happened and what you are doing simultaneously.

- **Stay calm, even when you are not**

The client's emotional state during a crisis is often calibrated to yours. A concierge who sounds panicked creates panic. A concierge who sounds calm, controlled and already working on the solution creates confidence. Whatever you are feeling internally, your external communication should always sound like someone who has seen this before and knows what to do.

- **Document everything**

Keep a record of what happened, when, what was communicated to the client, and how it was resolved. This is important for your own learning. It is also important if a dispute ever arises about how the situation was handled.

- **Follow up after resolution**

When the crisis is over, check in. 'I wanted to make sure everything went well after we resolved that situation earlier. Is there anything I can do?' This step is almost universally forgotten and is one of the most powerful trust-building moments in a client relationship.

#### WHAT NEVER TO SAY IN A CRISIS

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- **'That is not my fault'**

Even if true, saying it in the moment of a client crisis will make them less confident in you, not more. Take ownership of the situation first. There will be time for context later.

- **'I do not know'**

You can not know the answer yet. That is different from not knowing. Say 'I am finding out right now and will have an answer for you in fifteen minutes.'

- **'There is nothing I can do'**

In concierge, this phrase should almost never exist. There is almost always something you can do. The question is whether you are willing to do it.

- **'I told you so'**

If you advised against a choice the client made and it resulted in a problem, resist any version of this phrase entirely. It is never helpful and always damaging.

#### LUCIA'S INSIGHT

- *The best contingency planning happens before the crisis. A backup restaurant identified before you make the primary booking. An alternative driver confirmed before you need them. Build the backup into every arrangement.*
- *How you handle a crisis is remembered far longer than the crisis itself. The client who saw you navigate a difficult situation brilliantly is often more loyal than one who has never had a problem.*
- *After a significant failure, consider an appropriate gesture of goodwill. Not as an apology, but as a demonstration that you take the relationship seriously. This should be proportionate and thoughtful, not reflexive.*

## SECTION 15

# When to Stop Working With a Client

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*The signs, the conversation and the professional exit.*

Not every client relationship should continue indefinitely. Some clients are simply not right for the service you offer, the way you work, or the standard you hold. Knowing when to end a relationship, and how to do it professionally, is one of the most important and most underrated skills in building a long-term concierge business.

## SIGNS A CLIENT RELATIONSHIP IS NOT WORKING

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- **Consistent late payment or payment disputes**

A client who regularly pays late or disputes fees without genuine reason is communicating something about how they view the relationship. One instance is forgivable. A pattern is a decision to make.

- **Scope creep that cannot be resolved through conversation**

If a client consistently expects more than the agreed scope and is resistant to adjusting either the scope or the fee, the relationship is fundamentally misaligned. This usually gets worse, not better.

- **Disrespectful communication**

You are a professional providing a premium service. You are not someone's subordinate. If a client communicates with you in a consistently disrespectful way and does not respond to a professional, direct conversation about it, that is sufficient reason to end the relationship.

- **Requests that conflict with your values or your legal obligations**

A request that asks you to deceive someone, to act outside the law, or to compromise your professional ethics in any way is an immediate reason to reconsider the relationship. This is rare but not unheard of.

- **You cannot deliver at your own standard**

If the demands of a particular client make it impossible to serve your other clients at the standard you hold, or if the client's needs consistently exceed your current capability to deliver, the honest and professional response is to acknowledge this and help them find a better fit.

## HOW TO END A CLIENT RELATIONSHIP PROFESSIONALLY

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- **Have the conversation directly, not by email**

Unless the situation is extreme, a phone call is the right way to communicate this decision. It is more respectful and allows for a real conversation.

- **Give appropriate notice**

The notice period in your contract exists for moments like this. Honour it. In the absence of a contract clause, 30 days is standard and professional.

- **Offer to help them transition**

Where appropriate, offer to help the client find an alternative service provider. This is generous but strategic. How you end a relationship affects how people talk about you.

- **Document the reasons internally**

Keep a note of why the relationship ended. This protects you if questions arise later and helps you make better decisions about the clients you take on in the future.

- **Do not speak negatively about former clients**

Ever. In any context. To anyone. The luxury world is smaller than it appears, and discretion is the foundation of your professional reputation.

#### LUCIA'S INSIGHT

- *Ending a client relationship that is not working is not a failure. It is a business decision that protects your capacity to serve the clients who are the right fit.*
- *The clients who are easiest to say goodbye to are almost always the ones who have consumed the most of your energy relative to what they generate in income and in professional satisfaction.*
- *A clean, professional exit from a difficult client relationship occasionally results in that client returning later, once the issue that caused the problem has been resolved, with more respect for your standards than they had before.*

## SECTION 16

## Marketing and Social Media

*How to attract the right clients without a big budget or a big team.*

The marketing reality of luxury concierge is counterintuitive. The clients who are worth the most to your business are almost never found through paid advertising. They are found through referrals, through professional relationships, and through a consistent presence that signals quality over time. This means that most of your marketing budget should go into time, not money.

### MARKETING CHANNELS BY PRIORITY

- **Referral network — highest priority**

One satisfied client who tells two colleagues is worth more than three months of content marketing. Build referral into every client relationship. Tell clients that referrals are how your business grows. Ask specifically if they know anyone who might benefit. Make referring you easy by giving them something to share, your website, your Instagram, a one-page description of your services.

- **Professional partnerships — very high priority**

Private bankers, wealth managers, immigration lawyers, luxury real estate agents. Each of these professionals has regular contact with HNWI clients who need lifestyle support. A single warm introduction from a trusted professional is worth more than any paid campaign. Build these relationships before you need them.

- **LinkedIn — high priority for B2B and professional visibility**

Post weekly about the profession, the market, your perspective. Not sales posts. Insight posts. The content that makes a private banker think 'I should introduce this person to my clients.' Engage with wealth management and private banking communities. Connect with potential partners, not just potential clients.

- **Instagram — high priority for brand building and B2C**

Your primary brand-building platform for promoting your luxury concierge company. Use it to showcase your world, your expertise and the standard of your service. Potential HNWI clients, referral partners and corporate contacts will look at your Instagram before they ever contact you. Post consistently: lifestyle content that reflects the world your clients live in, behind the scenes of your work without breaking confidentiality, and content that demonstrates your insider knowledge of the luxury space. Quality over quantity. Every post should feel like it belongs in the world you are selling access to.

- **Your website — medium priority**

You need one. It does not need to be elaborate. A clean, professional one-page site with your positioning, your services, a brief biography and a contact method. This is the destination for every referral and every search. Make it easy to understand and easy to contact.

- **Paid advertising — low priority initially**

Paid Instagram or Google ads are rarely the right use of budget in the early stages of a luxury concierge business. The client acquisition cost is high and the conversion rate from cold traffic is low at this price point. Reserve paid spend for boosting high-performing organic content once you have identified what resonates.

## CONTENT THAT WORKS

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- **Insider knowledge posts**

Things most people do not know about the luxury world. The events calendar, the access points, the way HNWI clients actually live. This content attracts both potential clients and potential students of the profession.

- **Behind the scenes of your work**

Without breaking confidentiality. The complexity of what you coordinate. The problems you solve. The standard you hold. This content builds credibility.

- **Your personal story and perspective**

Why you do this. What you have learned. What surprises people about this profession. This content builds trust and connection.

- **Real results and transformations**

The trip that went perfectly. The client who had never experienced this level of service before. Without names, without identifying details, but with enough specificity to feel real.

- **Your expertise and point of view**

Content that demonstrates your deep knowledge of the luxury world — destinations, events, access, standards, insider knowledge. This positions you as a genuine authority in the space and attracts the kind of clients and partners who are looking for someone who truly understands the world they live in.

#### LUCIA'S INSIGHT

- *The best marketing for a luxury concierge business is doing the work so well that the people who experience it tell others about it. Everything else supports that, but nothing replaces it.*
- *Consistency matters more than volume. One high-quality piece of content per day beats ten mediocre ones. One deeply satisfying client experience beats ten adequate ones.*
- *Do not try to be everywhere at once. Choose two platforms and do them well. Adding more channels before you have mastered the ones you have is a distraction.*

## SECTION 17

# Scaling From Solo to Team

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*When and how to bring people in without losing the quality that got you here.*

The moment you start thinking about scaling is usually the moment you are slightly overwhelmed. You have more work than you can manage alone, more clients than you can serve at your standard, or more requests than you have hours to fulfil. This is actually a good problem to have. But the solution requires care, because the quality of your service is what you have been building your reputation on.

## SIGNS YOU ARE READY TO SCALE

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- **You are consistently at capacity**

You are turning down work or taking longer to respond than your own standard requires. This is the clearest signal.

- **Your income is stable enough to support a hire**

You have three or more months of consistent retainer income. You are not scaling on hope.

- **You have systems that can be taught**

If your entire operation lives in your head, hiring someone will not help. It will create new problems. Document your systems before you hire anyone.

- **You know what role you actually need**

The first hire is almost always the wrong hire if it is made in panic. Be specific about the role before you look for the person.

## THE FIRST HIRE

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- **Start with a part-time operations coordinator**

Not a junior concierge. Not a salesperson. Someone who can help you with research, supplier communications, scheduling and the administrative load that is consuming your time. This frees you to focus on the client relationships and the high-value work that only you can do.

- **Consider a virtual assistant first**

The irony of hiring a VA as a concierge who teaches VAs is not lost. But a skilled VA who can handle research, draft communications, manage your calendar and coordinate with suppliers is often the right first step before a full-time hire.

- **Train to your standard, not a general standard**

Whatever you hire, the person needs to be trained to your specific standards, your specific clients and your specific way of working. This takes time and deliberate investment. Do not rush it.

- **Protect client confidentiality from day one**

Any person with access to client information must sign a confidentiality agreement before they see a single client detail. This is non-negotiable, regardless of how well you know the person.

## THE FREELANCE NETWORK MODEL

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Many successful concierge businesses never hire full-time employees. Instead they build a trusted network of freelance specialists who work on specific engagements. A freelance events coordinator for major events. A freelance travel specialist for complex travel planning. A freelance lifestyle coordinator for specific client types. This model gives you scale without fixed costs, and allows you to bring in expertise that matches the specific demands of each engagement.

### LUCIA'S INSIGHT

- *Scale is not the goal. Quality at scale is the goal. Never sacrifice the second for the first.*
- *The biggest risk when scaling is that the client relationship was with you, not with your company. Transition client relationships carefully and personally when other team members start to take on more responsibility.*
- *The freelance network model is significantly underestimated. It allows you to scale revenue without scaling fixed costs, which is a much more resilient business structure in a market that can be unpredictable.*

# Revenue Streams and Business Model Evolution

*How the money works at every stage and where the real income lives.*

A mature luxury concierge business does not generate income from a single source. It generates income from multiple streams that compound over time. Understanding all of them and building toward a mix of recurring and project revenue, direct and commission income, is what turns a concierge practice into a real business.

- **Retainer income**

Your most important revenue stream. Predictable, recurring and directly linked to client retention. Every retained client represents a known monthly revenue figure. At five clients at \$2,000 per month, you have \$10,000 monthly before you open a single email. This is the financial foundation every concierge business should build toward.

- **Project income**

Higher variability but often higher margin per engagement. Relocations, major events, one-time complex arrangements. These can generate significant income from a single client in a short period. Build your pipeline so that project income supplements retainer income, not replaces it.

- **Commission income**

Typically 10 to 20% of additional revenue on top of your fee income. At meaningful client volumes, this can add \$20,000 to \$50,000 or more per year without adding a single new client. Track it carefully. Some months it will surprise you.

- **Partnership fees**

Some partnership arrangements generate a flat monthly or annual fee for being listed as a preferred supplier or recommended service. Less common but worth pursuing with the right partners.

- **White label income**

Revenue from operating a concierge service under another company's brand. Typically lower margin than direct client income but higher volume and more predictable.

#### LUCIA'S INSIGHT

- *The most financially resilient concierge businesses have at least three active revenue streams. If one slows, the others sustain the business.*
- *Never let commission income become more important than client income. If you are recommending suppliers primarily because of the commission they pay, you have lost the thing that makes your service valuable.*

# Business Scalation Milestones

*The stages every luxury concierge company passes through and what to focus on at each one.*

Building a concierge company does not happen in a straight line. It happens in stages. Each stage has different priorities, different challenges and different definitions of success. Knowing which stage you are in and what the next one requires is one of the most useful strategic advantages a founder can have.

- **Stage 1: Proof of concept (months 1 to 6)**

One to three clients. Figuring out what you actually offer, what clients actually need, and whether you can deliver at the required standard. Income: irregular. Priority: client retention and learning. Success metric: your first client renews.

- **Stage 2: Foundation (months 6 to 18)**

Three to eight clients. Stable retainer income. First systems and contracts in place. Commission income beginning. Income: \$3,000 to \$10,000 per month. Priority: retention, referrals and systems. Success metric: new clients are coming primarily through referral.

- **Stage 3: Reputation building (months 18 to 36)**

Eight to twenty clients. Strong referral network. Clear service tiers. Commission income meaningful. Possibly first freelance team member. Income: \$10,000 to \$30,000 per month. Priority: quality at scale and brand building. Success metric: you have a waitlist.

- **Stage 4: Scale (year 3 and beyond)**

A team, a brand, a multi-stream business model. Potentially white label contracts, corporate clients and multiple revenue streams running in parallel. Income: \$30,000 to \$100,000 per month and beyond. Priority: team quality, brand reputation and business structure. Success metric: the business generates income without requiring your personal involvement in every request.

## WHAT TO FOCUS ON AT EACH STAGE

The most common mistake in building a concierge company is focusing on stage four problems while you are in stage one. Worrying about team management before you have three clients. Investing in brand design before you know what your brand actually stands for.

- **Stage 1 focus:**

Get one client. Deliver brilliantly. Get the second client from the first.

- **Stage 2 focus:**

Build your systems. Lock in your pricing. Build your vendor network. Retain every client you have.

- **Stage 3 focus:**

Build your referral machine. Hire carefully. Protect your quality as you grow.

- **Stage 4 focus:**

Build the brand, the team and the infrastructure that does not depend on you personally for every outcome.

**LUCIA'S INSIGHT**

- *Most concierge businesses plateau at stage two because the founder tries to skip directly to stage three without finishing the work that stage two requires. The systems, the pricing and the vendor network are not optional. They are what stage three is built on.*
- *The speed at which you move through the stages is determined almost entirely by the quality of the relationships you build, not the quality of your marketing.*
- *Measuring the right things at the right stage matters. Revenue is the right metric at stage one. Retention is the right metric at stage two. Referral rate is the right metric at stage three.*

# The Long Game

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*What exceptional luxury concierge companies are built on.*

Every company in this guide has one thing in common. They did not build their business on a marketing strategy or a technology platform or a clever pricing model. They built it on client relationships so strong that the clients told other people, who told other people, who told other people. Everything else, the brand, the scale, the revenue, followed from that.

- **Discretion is your most valuable professional asset**

What you know about your clients is often more sensitive than they realise. Guard it absolutely. Never share client information. Never discuss client situations, even without names, in contexts where details could be traced back. Your reputation for discretion is the foundation every other aspect of your business is built on. Lose it once and you cannot get it back.

- **Relationships compound**

A client you serve brilliantly for five years becomes more valuable over time, not less. They know your standards. They trust your judgement. They refer without being asked. The concierge who retains clients for the long term generates significantly more income per client than one who is constantly replacing them with new ones.

- **Your network is your moat**

The relationships you build with suppliers, partners, referral sources and clients create a competitive advantage that is genuinely difficult to replicate. A new competitor can copy your pricing and your service structure. They cannot copy your ten years of relationships with the hotel teams, the private jet brokers, the event access specialists and the private bankers who trust you with their best clients.

- **Raise your standards before your clients demand it**

The best concierge companies stay ahead of their clients' expectations, not just at them. Anticipate what the market will expect in two years and start building toward it now. Whether that is technology integration, new service categories, international capability or a team with deeper expertise in specific areas.

- **Your reputation is built in private, not in public**

The most important things about your business happen in conversations that you are not part of. What your clients say about you to their friends. What your vendors say about you to other concierges. What your referral partners say about you to their clients. These conversations are shaped entirely by how you conducted yourself when no one was watching except the person you were serving.

#### LUCIA'S INSIGHT

- *The luxury concierge business that lasts is the one built on genuine relationships, genuine expertise and genuine care for the people it serves. Not the one with the best logo or the most followers.*
- *The clients who stay with you for years are rarely the ones who were the easiest to acquire. They are the ones who tested your standards early and found them solid.*
- *Build the company you would want to hire, if you were one of your own clients.*

## SECTION A1

# The Concierge Commandments

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*The non-negotiable principles that define the standard in this profession.*

Every profession has its principles. In luxury concierge, these are not guidelines. They are the foundation of everything you build. Print them out. Put them somewhere visible. Return to them when things get complicated.

## 01. Never say no. Nothing is impossible.

Unless it is unethical or illegal. The answer is always some version of yes, even if the path to yes is longer or different from what the client expected. A concierge who says no without exhausting every alternative is a concierge who has not done the work.

## 02. Confidentiality is everything.

What happens in a client's life stays between you and the client. Not with colleagues. Not with family. Not with other clients who ask. Not in casual conversation. The moment a client suspects you have shared something about them, the relationship is over. This is the one mistake from which there is no recovery.

## 03. The client is always right — even when they are not.

This does not mean accepting abuse or unethical requests. It means that your role is to serve, not to correct. If a client makes a choice you disagree with, your job is to execute it brilliantly, not to offer your opinion unless specifically asked.

## 04. Consistency is not optional.

You must deliver the same quality every time. Not most of the time. Every time. The client who experienced exceptional service last month expects the same this month. The moment your standard becomes unpredictable, you become unreliable.

#### **05. Listen more than you speak.**

Most of the information you need to serve a client brilliantly comes from listening, not from asking. The client who has to repeat themselves twice is already slightly less satisfied than they were. Hear it once and remember it permanently.

#### **06. Invest in yourself continuously.**

This profession rewards the people who stay informed, who build their knowledge and their network consistently, who treat learning as a professional obligation rather than an optional extra. The concierge who was excellent three years ago and has stopped learning is already falling behind.

#### **07. Price yourself correctly from the beginning.**

Starting too low is one of the most common and most costly mistakes in this profession. Adjusting your rate upward later is significantly harder than getting it right from the start. Charge what reflects the genuine value of what you offer.

#### **08. Sell happiness, not services.**

At the deepest level, every client is paying for a feeling. The feeling of being taken care of. Of having things handled. Of their life being slightly easier and more enjoyable because you are in it. Keep that in mind every time you make a decision about how to serve someone.

#### **09. Each client is unique.**

Never apply a formula. The solution that was perfect for one client may be entirely wrong for another. Understanding the specific person in front of you, their style, their preferences, their expectations, their fears, is what separates average service from service that creates genuine loyalty.

#### **10. Be patient with the growth of your business.**

There are steps to follow and business skills to develop on the way. Think twice before spending money you do not yet have on equipment, branding, staff, office space or anything else that feels impressive but is not yet necessary. Build the foundation before you build the tower.

#### **11. Learn to delegate.**

You cannot do everything well. The moment you try to do everything yourself, your quality starts to drop. Finding the right people to help you, and learning to trust them with specific tasks, is not a weakness. It is what allows you to grow without burning out.

## **12. Never criticise other clients or competitors.**

Not in conversation. Not on social media. Not in private. The person you think you are talking safely to is often more connected to the people you are discussing than you realise. Discretion applies in all directions.

## SECTION A2

# The Client Onboarding Form

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*Everything you need to collect before your first engagement begins.*

A thorough onboarding form is one of the most professional things you can put in front of a new client. It signals that you have a system, that you take their information seriously, and that you intend to deliver a personalised service from day one. The form below covers every category you will need for a comprehensive HNWI client profile. Adapt it to your specific service offer.

### PERSONAL INFORMATION

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- Full name and preferred form of address (Mr/Mrs/first name)
- Email address and phone number
- Date of birth (for anniversary and celebration management)
- Nationality and passport details
- Primary residence address
- Secondary residences where support may be needed
- Marital status and partner name
- Emergency contact name and number

### FAMILY AND HOUSEHOLD

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- Children: names, ages, schools, dietary requirements, allergies, interests
- Pets: type, breed, name, vet contact, size (essential for travel and accommodation)
- Household staff currently employed: names and roles
- Relevant family members or close associates likely to make requests on the client's behalf

### COMMUNICATION PREFERENCES

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- Preferred contact method: WhatsApp, email, phone, Signal
- Preferred contact time and do-not-disturb windows
- Whether they prefer proactive updates or contact only when needed
- Whether they want a dedicated personal concierge or are comfortable with a team

- Preferred language for communication

#### LIFESTYLE AND PREFERENCES

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- Dietary requirements and restrictions for all household members
- Favourite cuisine types and restaurants by city
- Preferred hotel brands and room types (adults-only, boutique, resort)
- Preferred airline and class of travel
- Loyalty programme memberships and numbers
- Preferred mode of travel: commercial or private aviation
- Vehicle information if relevant (for maintenance coordination)
- Interests and hobbies that inform activity and gift recommendations
- Preferred flowers, scents, music, reading material

#### TRAVEL PROFILE

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- Most frequent destinations
- Upcoming confirmed travel
- Ideal holiday scenario and preferred climate
- Seat preferences on commercial flights
- Special meal requirements on flights
- Whether they typically travel with staff or family

#### EVENTS AND OCCASIONS

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- Key dates: birthdays, anniversaries, school events, cultural observances
- Upcoming events that will require planning support
- Preferred style for celebrations: intimate or large, formal or relaxed

#### PAYMENT AND ADMINISTRATION

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- Preferred payment method for the concierge fee
- Whether the client provides a card for expenses or prefers invoicing
- Invoicing frequency and preferred format
- Accounting contact if relevant for expense tracking
- Whether they require receipts for all expenses

## SERVICE EXPECTATIONS

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- What specifically prompted them to seek a concierge service
- Previous concierge experience if any, and what worked or did not
- Their definition of excellent service in their own words
- Any known preferences or non-negotiables not covered above

# KPIs and Performance Tracking

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*The metrics that tell you how your business is actually performing.*

What gets measured gets managed. In a concierge business, the metrics that matter most are not the ones that look good in a presentation. They are the ones that tell you whether your clients are genuinely happy, whether your team is performing consistently, and whether your business is growing in a sustainable direction.

## CLIENT SATISFACTION METRICS

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- **Response time**

Average time from client message to concierge acknowledgement. Target: under 30 minutes during active hours.

- **Time to proposal**

From request received to options presented. Track by request category.

- **Number of complaints**

Total per month and per client. Any client with more than two complaints in a quarter requires a direct conversation.

- **Complaint resolution time**

How quickly are issues resolved once escalated. Under 24 hours is the standard.

- **Client retention rate**

The percentage of clients who renew. This is your most important long-term metric.

- **Net Promoter Score**

Ask clients periodically: how likely are you to recommend this service to someone you know? Simple but revealing.

## OPERATIONS METRICS

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- **Requests per client per month**

Understanding your most active clients and your quietest ones shapes your capacity planning.

- **Request categories**

Track which categories are most common: travel, dining, events, household, wellness. Where the volume is, your expertise should deepen.

- **Cities and destinations with highest demand**

Essential for deciding where to build your vendor network first.

- **Peak demand times**

Which hours, days and months are busiest. Affects staffing, availability and pricing decisions.

- **Cancellation and amendment rate**

High cancellation rates from suppliers signal relationship problems. High cancellation rates from clients signal expectation misalignment.

- **Commission income by category**

Track which supplier categories are generating the most commission income. Informs where to deepen relationships.

## BUSINESS HEALTH METRICS

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- **Monthly recurring revenue**

Your retainer income. Should be growing month on month.

- **Average client lifetime value**

Total fee income per client over the full duration of the relationship.

- **Client acquisition cost**

What does it cost you in time and money to acquire each new client. Should decrease as referrals grow.

- **Membership churn rate**

How many clients leave per quarter and why. Track reasons.

- **Revenue per client**

Retainer plus project fees plus commission income per client per year.

### LUCIA'S INSIGHT

- *Review your KPIs monthly, not quarterly. In a relationship-based business, problems that are visible in monthly data can be invisible in quarterly averages.*
- *The most important KPI in the early stages of a concierge business is client retention. If you are retaining every client you bring on, everything else will follow.*
- *Do not track everything at once. Choose five metrics to start with and build from there. Too many KPIs create noise. Too few create blind spots.*

# Expense Categories and Budget Planning

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*What running a concierge business actually costs, and where to spend wisely.*

One of the genuine advantages of a luxury concierge business is that the startup costs are relatively low. You do not need a physical office, significant inventory or expensive equipment to start. But you do need to budget carefully and understand where your money goes, particularly in the first year when income may be irregular.

## EXPENSE CATEGORIES TO PLAN FOR

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### ● Brand and identity

Logo, colour palette, style guide, brand photography. A one-time investment that pays back through first impressions. Budget \$500 to \$3,000 depending on whether you use a designer or a platform like Canva.

### ● Website

Domain, hosting and creation. Squarespace, Wix or similar platforms allow professional results without development costs. Budget \$200 to \$500 per year for a solo practitioner. More for a company site with booking functionality.

### ● Professional email

Your domain-based email address. Essential. Budget \$10 to \$20 per month.

### ● Social media content

Photography, graphic design, content scheduling tools. Budget \$50 to \$300 per month depending on your approach.

### ● Accounting and administration

Accounting software, invoicing tools, expense tracking. Budget \$30 to \$100 per month.

### ● Legal

Contract template review, NDA, business registration. A one-time investment of \$500 to \$2,000 that protects everything you build.

### ● Insurance

Professional indemnity and general liability. Budget \$400 to \$1,000 per year depending on your jurisdiction and coverage level.

### ● Networking and events

The events, memberships and gatherings where you build your referral network. Budget \$1,000 to \$3,000 per year. Treat this as a business development investment, not a social expense.

### ● Technology and tools

Project management software, CRM, communication tools, world clock app, VPN. Budget \$50 to \$200 per month.

- **Market research and education**

Industry reports, courses, certifications. Budget \$500 to \$2,000 per year. This is an investment in the quality of what you offer.

- **Pre-reservations and deposits**

For some services you will need to secure availability before the client has confirmed. Budget a working capital buffer of \$500 to \$2,000 for this.

- **Payment platform fees**

Stripe, PayPal and similar platforms charge 2 to 4% per transaction. Factor this into your pricing or pass it to the client transparently.

## WHAT NOT TO SPEND MONEY ON IN YEAR ONE

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The temptation when building something new is to make it look established before it is. Resist this. The following are common early-stage expenditures that rarely generate a return proportionate to their cost.

- **A physical office**

Until you have consistent client meetings that genuinely require a dedicated space, a co-working day rate is a significantly better use of money. Most HNWI client meetings happen at their location, not yours.

- **Newspaper and magazine advertising**

High cost, low conversion for a premium personal service. Your first clients will come through relationships, not ads.

- **Large print runs of branded materials**

Business cards in boxes of 500, brochures in quantities of 200. Start with digital-first. Print in small quantities when you genuinely need them.

- **Paid social media advertising before organic content is working**

Paid ads amplify what is already working. They do not fix content that is not resonating. Build your organic presence first.

### LUCIA'S INSIGHT

- *The businesses that run out of money in year one are almost always the ones that spent too much on looking professional before they had revenue to justify it.*
- *Your most important early investment is time, not money. The hours you spend building relationships, learning the market and refining your offer will generate more return than any paid service.*
- *Keep a simple monthly budget spreadsheet from day one. Know exactly what you are spending and what you are earning. This discipline will serve you for the entire life of the business.*

## A FINAL NOTE

# Build something worth building.

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Being a luxury concierge is one of the most human businesses that exists. At its best, it is built on trust, on genuine care and on the quiet satisfaction of making someone's life genuinely easier. No algorithm replaces that. No platform scales it the way a great reputation does.

What makes this profession extraordinary is also what makes it demanding. The standard is always high. The expectations are always real. The moments that define your reputation are almost always the difficult ones, not the easy ones.

The manual you have just read is a framework. The company you build will be yours. Every client you serve, every relationship you build, every problem you solve quietly and brilliantly will be something you did, not something you read about.

Start with the next right action. Contact one potential client. Reach out to one potential partner. Set your pricing. Write your first contract. Whatever the next step is for where you are right now, take it today.

The luxury concierge world is waiting for more people who take it seriously. Be one of them.

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## *Lucia*

Founder, AIRE Concierge & The Concierge Hub

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