



# IN-HOUSE SERVICES.

THE GUIDE.

BY THE CONCIERGE HUB

# How to use this manual

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In-house service is where a concierge relationship becomes truly irreplaceable. Anyone can book a restaurant or arrange a transfer. Very few people can step into a private home, understand everything that needs to happen, anticipate what has not been asked for yet, and coordinate it all without friction or fuss.

This manual is a working tool, not a theory document. Every section reflects real situations from real client relationships. Use it to onboard yourself to a new client, to structure your thinking before a first meeting, or to cross-check that nothing has been missed on an ongoing engagement.

The checklist items include a Status and Notes field precisely because no two clients are the same. Fill them in. A completed manual, tailored to a specific client, is one of the most professional things you can hand to a new household manager, a backup concierge, or the client themselves if they request transparency.

Work through it in order for a new client relationship. For existing clients, treat it as an audit. You will almost always find something worth adding.

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## SECTION 01

# Client Profile & Lifestyle Mapping

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*Know your client before you serve them. Everything else follows from this.*

*The first thing I do with any new in-house client is build their profile document. Not the version they fill in on a form. The real version, built from observation, conversation and careful listening over the first few weeks. This section gives you the framework.*

## KNOW YOUR CLIENT

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### ● Who lives in the household?

Adults, children, live-in staff, frequent guests, pets. Understand the full cast before you start. Ask who has authority over what decisions. In large households there is often a hierarchy that is not obvious from the outside.

### ● What is their daily and weekly rhythm?

Wake times, meal preferences by time of day, workout schedules, recurring appointments. This single piece of information will allow you to anticipate 80% of daily needs without being asked.

### ● Do they travel frequently?

How often, to where, for how long. Are properties left vacant or staffed during absences? Who is in charge while they are away? Establish this protocol before the first trip, not during it.

### ● What are their service expectations?

Formal, relaxed, or minimal? Some HNWI clients want military precision. Others want warmth and informality. Neither is right. Your job is to read which one this client is and calibrate accordingly.

### ● Are there non-negotiables?

Dietary rules, privacy preferences, cultural or religious requirements, household routines that must not be disrupted. Ask once. Record everything. Never ask again.

## THE CLIENT OPERATIONS SHEET

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Before you do anything else for a new in-house client, build their Operations Sheet. This is a single living document that answers every question before it gets asked. I update mine after every significant client interaction.

- **Daily routine overview**

Wake time, morning rituals, meal preferences, workout schedule. This is the backbone of your service. Get it right.

- **Communication preferences**

WhatsApp, email, voice notes or calls. Frequency, tone, who to copy. Do-not-disturb windows. The client who texts back immediately and the one who checks messages once a day need completely different approaches.

- **Household staff list and schedules**

Full names, roles, contact numbers, working hours, days off. Who reports to whom. Who handles emergencies in your absence.

- **Preferred brands and suppliers**

From olive oil to cleaning products to florists. Ask once, record it, never ask again. This detail separates a professional from an amateur.

- **The never list**

Non-negotiables, stated or inferred. Foods they will not eat. Contractors who are no longer trusted. Scents they dislike. Keep this updated.

- **Personal details that matter**

Candle scent, pillow preference, room temperature, morning newspaper, anniversary dates, children's names and ages, names of close friends and family. These are not trivial. They are your competitive advantage.

- **Emergency protocol**

Who to call first. Medical contacts. Building superintendent. Trusted family member. Security contact. Have this ready before you ever need it.

#### LUCIA'S INSIGHT

- *Create a lifestyle profile document per client. Update it regularly, not just at onboarding.*
- *The best profile is built from observation, not just from what the client tells you.*
- *If a client has a household manager, get their version of the profile too. They will know things the client has forgotten to mention.*
- *A completed Operations Sheet is also your handover document if you are ever unavailable.*

# Communication & Workflow Preferences

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*How, when and through whom you communicate will define the entire relationship.*

*Every client is different. One wants short WhatsApp voice notes. Another expects a weekly PDF summary. One calls at 11pm on a Friday and considers it normal. Another would never contact you outside working hours. Understanding this early, and adapting to it completely, is one of the most underrated skills in this profession.*

- **What is their preferred communication channel?**

WhatsApp, Signal, iMessage, email, Telegram, Slack. Ask directly. Do not assume because one platform is more convenient for you. If they use Signal, you use Signal.

- **Do they prefer check-ins or contact-when-needed?**

Daily morning briefings work well for some clients. Others find them intrusive. Ask, then adapt. The wrong frequency is as damaging as the wrong channel.

- **Should you contact them directly or go through a gatekeeper?**

Many HNWI clients have a personal assistant, a chief of staff, or a household manager who filters access. Understand the hierarchy and respect it. Bypassing it, even with good intentions, will damage trust.

- **Are there do-not-disturb windows?**

Travel days, family meals, weekends, early mornings. Know these. Build them into your working rhythm. A message sent at the wrong moment is remembered.

- **What tone do they prefer?**

Formal and professional. Warm and conversational. Ultra-concise, bullet points only. Match their register, not your natural one.

## CHECKLIST

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- Client communication protocol established and documented (who, when, how)
- Preferred channel confirmed and set up on your device
- Tone and formality level noted
- Gatekeeper or assistant identified and introduced
- Do-not-disturb windows recorded in your calendar
- Emergency contact flow defined: what constitutes an emergency, who to reach and how

- Reporting format agreed: daily briefing, weekly summary, or ad hoc only
- Client confirmed whether they want to see vendor quotes before approval or after

#### LUCIA'S INSIGHT

- *If you are ever unsure whether to send a message, wait. Most things that feel urgent at 9pm are not.*
- *The client who always replies in one word is not being rude. They are telling you how they want to be communicated with. Mirror it.*
- *Set up a separate WhatsApp or email folder for each client. Never send a message meant for one to another.*

## SECTION 03

# Daily Lifestyle & Logistical Needs

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*The operational rhythm of a luxury household, and how to keep it running without friction.*

*This is the section most people think of when they think of concierge work. The reality is that logistics are the floor, not the ceiling. Your job is to make these things invisible. The moment a client has to think about any of the following items, something has gone wrong.*

## TRANSPORTATION

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- **Daily driver schedules confirmed and briefed**

Driver should know the day's agenda by 7am. Any changes to the schedule go to the driver before they go to the client.

- **Car preferences documented**

Brand, interior temperature, music or silence, seat position, scent. For longer transfers, confirm whether the client prefers an SUV with full recline. Ask once. Record it.

- **Private aviation arrangements**

Jet or helicopter charter confirmed with ground handling and concierge services at both ends. Brief the FBO. Brief the crew. Send the client a one-page travel summary the evening before.

- **Backup transportation always arranged**

Never have a single point of failure for transport. Have a backup driver or car service on standby for any confirmed booking.

- **24/7 transportation contact available**

The client should never have to call a taxi app. Ever.

## HOUSEKEEPING & CLEANING

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- **Cleaning schedule confirmed with client**

Preferred days, times, rooms in order of priority. Some clients do not want cleaning staff in the bedroom while they are home. Ask.

- **Cleaning products approved**

Chemical-free, hypoallergenic, specific brands only. This is more common than you think and a significant source of early friction if not addressed.

- **Staff rotation documented**

Live-in versus external. Days off covered. Who is responsible for what. Never leave a coverage gap undiscovered.

- **Standards documented and briefed**

Folding technique for towels, bed-making style, product placement after cleaning. These details are what separates hotel-quality results from adequate ones.

## DELIVERIES & ERRANDS

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- **Incoming package protocol established**

Where deliveries go, who signs, how the client is notified, how long items are held before being brought to their attention.

- **Grocery sourcing confirmed**

Preferred suppliers, delivery days, standing order items that are always restocked, brands that are never substituted. Build a master grocery list and review it monthly.

- **Luxury personal shopping handled proactively**

Know upcoming events, trips and occasions. Source relevant items before the request comes in. This is the difference between reactive and anticipatory service.

## FOOD & DINING

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- **Daily food preferences documented**

Breakfast preferences, lunch habits, fasting days, snack preferences, dietary restrictions. The more granular, the better.

- **Chef or meal service confirmed and briefed**

If the household has a private chef, your role is coordination and preference management. Ensure the chef has the same profile document you do.

- **Table setting and dining preferences noted**

Formal or informal, floral arrangements, preferred crockery, music during meals, candles yes or no. These preferences exist and they matter.

- **Restaurant reservations managed proactively**

When you know a client's calendar, pre-book dining around key dates before they think to ask. The best tables go weeks in advance.

## EVENT & SOCIAL PLANNING

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- **Annual social calendar mapped**

Key dates: birthdays, anniversaries, regular dinners, charity commitments, school events for children. Put them all in your own calendar with lead-time reminders.

- **Vendor relationships for events established**

Florists, caterers, musicians, AV companies, lighting designers. Have a vetted shortlist ready before the request arrives.

- **RSVP management handled**

Track invitations, responses, plus-ones, dietary requirements for guests. Never let a deadline lapse.

- **Gift management handled year-round**

Know birthdays, occasions, relationships. Source and send gifts on behalf of the client. Keep a log of what was sent to whom, so the same gift is never repeated.

### LUCIA'S INSIGHT

- *Logistics are only invisible when they work perfectly. Your client should never feel the machinery.*
- *A standing grocery order reviewed monthly saves more time than any scheduling tool.*
- *Gift management is one of the most underrated services you can offer. Most clients are terrible at it and relieved when someone takes it over.*
- *The moment a client calls a taxi app, you have failed at something. Find out what and fix it.*

# Household Organization & Systems

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*The structures that make a luxury home run at the standard the client expects.*

*A well-organized household is invisible. Nothing runs out. Nothing breaks without a plan. Nothing gets lost. Building these systems takes time at the start of a relationship, but saves enormous amounts of time and prevents almost all of the crises that damage client trust.*

- **Kitchen and pantry organization**

Labeling, zoning, luxury product sourcing and restocking schedules. Build a pantry inventory document and review it weekly. Never let a preferred item run out. For clients with a private chef, the pantry is the chef's domain. Coordinate, do not override.

- **Wardrobe management**

Seasonal rotation schedule, preferred dry cleaner, alteration and repair contacts, packing services for travel. Some clients want their wardrobes photographed and catalogued. This is not unusual and is an excellent service to offer proactively.

- **Housekeeping systems**

Cleaning schedules by room, preferred products, standards documentation. Written instructions for staff mean consistent results regardless of who is working that day.

- **Mail, deliveries and paperwork**

Incoming mail handling, package logging, document scanning and filing, shredding protocols for sensitive documents. Some clients want daily mail summaries. Others want everything filed without involvement. Ask.

- **Maintenance schedules**

Appliances, HVAC systems, pool and garden, vehicles, art and valuables. Build a maintenance calendar with reminders set well in advance. A boiler serviced on schedule is invisible. A boiler that fails in winter is a crisis.

- **Household manual**

A single written document covering all household systems: how everything works, where everything is, emergency contacts, vendor contacts, alarm codes. This document should exist independently of you, so that the household can function if you are unavailable.

- **Vendor and supplier contact list**

Every regular service provider: plumber, electrician, cleaner, gardener, pool service, HVAC technician, art installer. Names, numbers, notes on reliability. Updated when anything changes.

- **Digital backups**

Scanned receipts for major purchases, appliance warranties and manuals, insurance documents, service records. Store securely. The client should be able to find anything within two minutes.

**LUCIA'S INSIGHT**

- *A Household Manual is the single most professional thing you can create for a new client. It takes time to build and saves that time back tenfold.*
- *Remote concierges: household organization consulting via video call is a legitimate, billable service. Walk staff through systems setup with your guidance.*
- *Never rely on memory for a maintenance schedule. Calendar everything with a two-week lead-time reminder.*
- *The vendor contact list should include notes on each supplier. 'Available weekends', 'requires advance notice', 'ask for Marco' are the details that matter under pressure.*

# Staffing & Home Service Coordination

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*How to source, vet, brief and manage the people who make a luxury household run.*

*Household staff management is one of the most complex and sensitive responsibilities a concierge can take on. These are relationships between real people, often in someone's private home. Get it right and it becomes one of the most valued things you do. Get it wrong and it damages everything.*

## ● **Sourcing and screening**

Referrals are always the first route. A housekeeper recommended by a trusted colleague is worth ten from an agency. When using agencies, use specialist household staffing agencies, not general recruitment. The vetting standards are different. Always conduct your own interview before presenting a candidate to the client.

## ● **Writing job descriptions**

Be specific about hours, duties, household standards and personality fit. A vague job description attracts the wrong candidates and creates misaligned expectations. The clearer the brief, the better the hire.

## ● **Onboarding new staff**

Do not hand a new hire a key and walk away. Spend time on their first day covering the household standards, the client's preferences, communication protocols, the location of everything, and any non-negotiables. This investment prevents 90% of early-tenure problems.

## ● **NDA's and confidentiality**

All household staff should sign an NDA before their first day. This is standard practice in luxury households and should be presented as such. Have a template prepared. Some clients will have their own legal team handle this.

## ● **SOPs for recurring tasks**

Standard Operating Procedures for the most common household tasks: how the client likes the bed made, how the kitchen is to be left after the chef finishes, how deliveries are handled. Written SOPs mean consistent results regardless of who is working.

- **Managing rotations and cover**

Every regular staff member needs a named cover. Do not discover on the day that the regular housekeeper is sick and there is no one to call. Have a cover protocol for every role before it is ever needed.

- **Etiquette briefings**

Household staff working with HNWI clients need guidance on discretion, communication standards, behavior in front of guests, use of personal devices and handling of sensitive information. Brief this formally, not informally.

- **Staff welfare and retention**

The best household staff are retained, not constantly replaced. Treat staff with respect, communicate clearly, address issues directly and privately, and acknowledge good work. High turnover in a household is disruptive to the client and reflects on the concierge who manages it.

#### KEY QUESTIONS BEFORE STARTING

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- Does the client prefer live-in or external staff?
- Are there roles that overlap (chef who shops, driver who handles errands)?
- Is there a household manager, or are you the main coordinator?
- Are staff accommodations and logistics arranged for travel assignments?
- Is there a clear communication chain between staff, client and concierge?

#### LUCIA'S INSIGHT

- *Offer an onboarding package for new staff: SOPs, etiquette briefings and contact trees. This is a service the client will remember.*
- *Never discuss one staff member with another. Confidentiality applies upward and laterally, not just toward the client.*
- *A household that runs well is invisible. A household that runs badly is very visible. The quality of the staff you place reflects directly on you.*

# In-House Lifestyle Services

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*The full scope of what luxury clients expect at home, and how to coordinate it.*

*In-house lifestyle services is where the concierge role expands beyond logistics into something closer to life design. The list below is not exhaustive, but it covers the services most commonly requested. The skill is not knowing how to provide all of these yourself. It is knowing exactly who to call for each one, and making the experience seamless from first request to final delivery.*

## WELLNESS & HEALTH

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- **In-home spa and beauty services**

Massage therapists, facialists, nail technicians, lash artists, aromatherapists. Build a vetted directory of mobile practitioners for the key cities where your client spends time. Vet for discretion and professionalism, not just skill.

- **In-home medical and IV therapy**

Private GPs, nurses for IV drips and vitamin infusions, physiotherapists. These services are increasingly common in HNWI households. Know your local providers and their call-out policies.

- **In-home fitness**

Personal trainers, yoga instructors, pilates teachers. For clients with home gyms, coordinate equipment servicing. For clients without, know which trainers are accustomed to traveling to client homes.

- **Mental health and coaching**

Therapists, executive coaches and life coaches who work with HNWI clients require a particular approach and level of discretion. Build relationships carefully and refer only practitioners you trust completely.

## FOOD & CULINARY

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- **Private chef nights and in-home dining**

Coordinate the brief, the menu, the wine pairing, the service style, the clearing and the follow-up. A private dining experience in someone's home should feel as polished as a restaurant, without any of the visible effort.

- **Culinary experiences and workshops**

Cooking classes, wine and sommelier sessions, food and culture experiences. These work well for clients who like to entertain or have guests visiting. Coordinate the experience from brief to follow-up thank-you.

- **Specialist food sourcing**

Rare ingredients, seasonal delicacies, imported products, dietary-specific items. Know your specialist suppliers: the truffle importer, the Japanese beef contact, the raw milk dairy. These relationships take time to build. Start now.

## HOME & LIFESTYLE

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- **Art collection management**

Liaising with galleries and art advisors, coordinating installation and de-installation, managing insurance documentation, arranging conservation consultations. Do not attempt to advise on art value or acquisition unless you have specific expertise.

- **Interior consulting and home staging**

For clients renovating, moving or refreshing a space. Coordinate with interior designers and architects. Your role is project management and client communication, not design direction.

- **Home technology management**

Smart home systems, Wi-Fi networks, security cameras, entertainment systems. Know a reliable AV and smart home technician for every city. A client who cannot get their television to work in a new property is not a small problem.

- **Eco-friendly home consulting**

Increasingly requested by clients with environmental commitments. Know suppliers of sustainable cleaning products, organic provisions and energy-efficient solutions. Do not greenwash. Only recommend what genuinely meets the standard.

## FAMILY & PERSONAL

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- **Childcare coordination**

Vetted babysitters, nannies and childcare professionals. Always check references personally. Never recommend someone you have not vetted yourself.

- **Tutoring and educational support**

Academic tutors, language teachers, music teachers, art instructors. Keep a network of specialists across the subjects most commonly requested.

- **Pet care**

Veterinary contacts, groomers, dog walkers, pet sitters for travel periods. Know which vets offer home visits. For clients with horses or exotic animals, specialist contacts are essential.

- **Personal shopping and styling**

Wardrobe curation, gift sourcing, seasonal shopping. Know which personal shoppers work with HNWI clients and understand their standard of discretion.

**LUCIA'S INSIGHT**

- *You do not need to provide all of these services yourself. You need to know who does.*
- *Vet every lifestyle service provider for discretion before skill. Skill is replaceable. A breach of client privacy is not.*
- *Remote add-on: acting as a remote household assistant, scheduling, sourcing and coordinating across time zones, is a genuine, billable service offering.*
- *Keep a vetted luxury service provider directory updated quarterly. Rate each provider on reliability, discretion and quality.*

# Global & Remote Concierge Capabilities

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*Serving clients who live across multiple properties and time zones.*

*HNWI clients rarely have one home. A villa in Ibiza, a penthouse in London, a chalet in Gstaad, an apartment in New York. The concierge who can coordinate seamlessly across all of them, in advance and in real time, is a rare and very valuable one. This section covers what that requires.*

- **Time zone and calendar mastery**

Operate across time zones without confusion. Use a world clock. Know what time it is for your client before every communication. A message sent at 3am their time is never a good message, regardless of the content.

- **Pre-arrival coordination for every property**

Before a client arrives at any property, that property should be ready. The correct temperature, the correct provisions, the correct flowers, the correct scent. Coordinate with local staff in advance, not on the day of arrival.

- **Cross-border vendor sourcing**

Building a vetted network of suppliers in multiple countries takes years. Prioritize the cities and regions your current clients use most. A single trusted local contact in each key location is worth more than a list of untested options.

- **Understanding local customs and privacy laws**

Data privacy laws vary significantly between jurisdictions. What is standard practice in one country may be legally restricted in another. Particularly relevant in Europe (GDPR) and the Middle East. Know the rules before you operate in a new country.

- **Remote staff onboarding**

For clients opening new properties or traveling to unfamiliar locations, the ability to brief and onboard local staff remotely via video call is an increasingly valuable service.

- **Multi-property consistency**

The client's preferences do not change because the property changes. The same pillow, the same morning newspaper, the same breakfast items. Build a property-specific setup sheet derived from the client's master preferences, and send it to local staff before every visit.

## TOOLS TO USE

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- Project management: Asana or Notion for coordinating multi-property tasks
- Secure file sharing: Google Drive or Dropbox with appropriate access controls

- Global address book and supplier database: your most valuable professional asset
- World clock app: always visible, always consulted before sending
- Shared household calendar: accessible to all relevant staff, updated in real time

#### LUCIA'S INSIGHT

- *A property-specific setup sheet sent to local staff before every arrival is one of the highest-value things you can systemize.*
- *Build your international network before you need it. A contact in Dubai made at a networking event is infinitely more useful than a cold call during a client crisis.*
- *Never assume local standards match client expectations. Always brief local staff as if they have never worked with a client like this before.*

# Family Dynamics & Support Services

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*The nuance and care required when serving entire households, not just individuals.*

*Serving a family rather than an individual adds layers of complexity that the most polished logistics will not resolve on their own. Children have their own rhythms and needs. Elderly parents have their own dignity and privacy requirements. Pets are non-negotiable members of the household for many clients. Understanding the full family picture before you start is essential.*

- **Children's schedules and needs**

School pickup times, extracurricular activities, tutor schedules, playdate coordination, dietary preferences, allergies, medical contacts. Keep this information current. Children's schedules change frequently, especially around school terms.

- **Teenage privacy and independence**

Teenagers in HNWI households often have a degree of independence that requires different handling. They may have their own drivers, their own schedules, their own preferences. Understand what your role is in relation to them, and what it is not.

- **Elderly family members**

Medical coordination, comfort accommodations, caregiver scheduling, companionship arrangements where appropriate. Always communicate with elderly family members with the same respect and directness you would use with the primary client.

- **Pet care and logistics**

Vet appointments, grooming schedules, dietary requirements, pet travel documentation, boarding or pet-sitting arrangements during travel. For clients with multiple pets or unusual animals, specialist knowledge and specialist contacts are required.

- **Family travel logistics**

Passports and visas for all family members, travel insurance, seating preferences, meal requirements, entertainment kits for children, transfer logistics at both ends. A family of five traveling is five times the complexity of a solo traveler.

- **Multi-generational and blended households**

Cultural, religious and dietary considerations that apply differently to different generations. Sensitivity around step-relationships, co-parenting arrangements and VIP relatives who visit. Ask the primary client how to navigate these dynamics before you encounter them.

- **Sensitive relationships**

Co-parenting situations, estranged family members, high-profile relatives who attract media attention. Know who is and is not welcome in the household. Know what information is not to be shared with whom. These distinctions matter enormously and are rarely stated explicitly.

#### CHECKLIST: FAMILY ESSENTIALS

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- Family calendar built with color-coded roles: children, adults, pets, recurring events
- List of child-safe service providers: vetted babysitters, drivers, entertainers, tutors
- Emergency contacts for every family member including pediatrician and specialists
- Preferred gift list for each family member for birthdays and milestones
- Protocol for guest visits, extended family stays and traveling household staff
- Pet travel documentation checked and up to date
- Children's dietary requirements and allergies documented and communicated to all relevant staff

#### LUCIA'S INSIGHT

- *Never make assumptions about family dynamics. Ask. Then listen carefully to what is said, and what is not.*
- *Children remember concierges who take them seriously. A small, well-chosen detail for a child earns enormous loyalty from their parents.*
- *Pets are family members to most HNWI clients. Treating them as an afterthought is a significant mistake.*

## SECTION 09

# Anticipation & Personalization Systems

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*The systems that make clients feel truly known, not just well-served.*

*Anticipation is the highest form of concierge service. It is the difference between a client who is satisfied and a client who tells their network about you. It cannot be faked, and it cannot be automated. It is built through careful observation, disciplined documentation, and genuine interest in the person you serve.*

## BUILDING THE PERSONAL PROFILE

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### ● Preferences, birthdays and favorite brands

Not just the obvious ones. The restaurant they always return to when in Paris. The brand of mineral water they prefer. The specific flowers that make them smile. Capture these details as they emerge in natural conversation, not through a questionnaire.

### ● Travel patterns and seasonal habits

Where do they go in summer. What does a ski season look like for this family. When do they tend to host large dinners. Knowing the rhythm of a client's year allows you to be three steps ahead of it.

### ● Calendar cycles and recurring needs

School terms, Ramadan, Christmas, summer holidays. These define the rhythm of every household. Map them. Set reminders at appropriate lead times before each one.

### ● Recent purchases and experiences

What they bought last season tells you what they might want this season. What they did on their last trip suggests what they might want to do differently on the next one. Pay attention. Connect the dots.

### ● What they do not like

A preference for what to avoid is as important as a preference for what to include. The restaurant they mentioned was disappointing. The type of music they turned off. The vendor they seemed uncomfortable with. Record it.

## THE CURATED VENDOR DIRECTORY

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Your curated directory of service providers is one of the most valuable things you build over time. It should include only providers you have personally vetted or used, rated on reliability, discretion and quality. Review and update it quarterly.

- Luxury transportation: chauffeurs, private jet contacts, yacht brokers, helicopter operators
- Private chefs and sommeliers across key cities
- Wellness experts: massage therapists, aestheticians, cosmetic physicians, acupuncturists
- Event specialists: planners, florists, butlers, lighting designers, AV teams
- Household staff: housekeepers, nannies, chefs, drivers, security personnel
- Trusted suppliers by region: local knowledge is irreplaceable
- Access-only experiences: fashion previews, art openings, private events, cultural moments

#### LUCIA'S INSIGHT

- *Anticipation cannot be faked. It comes from genuine attention and disciplined documentation.*
- *The best concierges ask themselves after every client interaction: what did I just learn about this person?*
- *A vendor directory with personal notes is worth ten times more than a clean list of names.*
- *The question to ask before suggesting anything: does this match who they are, or who I think they should be?*

# Client-Facing Communication Tools

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*Staying connected and relevant without becoming intrusive.*

*The best client-facing communication makes the client feel curated for, not marketed to. There is a significant difference. Everything you send should feel like it came from someone who knows them specifically, not from a newsletter list. This section covers the formats that work, and the principles behind using them well.*

- **Quarterly lifestyle newsletters**

A curated selection of handpicked experiences, travel openings, cultural events and seasonal suggestions relevant to this specific client's interests. Not a generic round-up. If it could have been sent to anyone, it should not be sent. Examples: 'Where to ski this winter without the crowds' for a client who travels in January. 'Three new openings in Tokyo' for a client with a trip planned. Keep it short, visually clean and always linked to something actionable.

- **Curated WhatsApp or email suggestions**

Occasional, timely and specific. 'You are in Paris next week. There is a private dinner at a new atelier on Thursday. Would you like me to arrange an invitation?' This is the format that generates the most client appreciation. Send it rarely enough that it always feels like a genuine suggestion, not a habit.

- **Client portals for high-level clients**

For clients managing multiple properties, complex travel schedules or large household teams, a password-protected dashboard with itinerary drafts, household checklists, document storage and priority booking requests is a significant value-add. Platforms like Notion or a custom-built solution can serve this purpose. The portal should feel like a luxury product, not a project management tool.

- **Weekly or monthly household summaries**

For clients who want transparency and an overview without being involved in daily operations. A clean, well-formatted summary covering what was managed, what is upcoming, any decisions required and any items to note. One page maximum. Every time.

- **Proactive occasion reminders**

Birthdays, anniversaries, school milestones, cultural dates the client observes. A brief message a week before an important date, with a suggestion ready to act on, is one of the simplest and most appreciated things a concierge can do. 'Your mother's birthday is in ten days. Shall I arrange the usual?'

**LUCIA'S INSIGHT**

- *If it could have been sent to anyone, it should not be sent. Every client-facing communication should feel specific.*
- *Frequency matters as much as content. Communicate too rarely and you feel absent. Too often and you feel like work.*
- *A well-timed, well-chosen suggestion sent via WhatsApp is worth more than a beautifully formatted quarterly report.*
- *The goal of all client-facing communication is to make the client feel that someone is thinking about them, specifically, with care.*

## A FINAL NOTE

# Excellence is in the details.

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In-house service is not glamorous from the inside. It is early mornings, last-minute changes, imperfect information and the constant pressure of maintaining a standard that leaves no room for visible effort.

What makes it extraordinary is what the client experiences: a household that simply works. A life that feels effortless. The quiet confidence that comes from knowing someone is handling everything, and handling it well.

That is what this manual is built to help you deliver. Not the knowledge of what to do. The discipline to do it consistently, at the standard that distinguishes a truly exceptional concierge from everyone else.

Use it. Build on it. And when a client tells someone else about you, you will know it was worth it.

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