



## Essential Elements™

### Software Demo Questions

The Essential Elements™ data collection software system is designed specifically for the Concierge and Lifestyle Management industry. It has been in use since 2007 and is a mature and stable web-based product.

It is intended to drastically reduce your data entry management efforts and to simplify your administrative duties so you may have more time for the sales, marketing and networking efforts that grow your business.

And, while the system is complex, the user interface is very simple to learn and very easy to use.

- ***What will the system look like?***
  - Website
  - Cloud based
  - Customized with your logo and colors
  
- ***What data is tracked?***
  - Concierge (employees)
  - Clients
  - Activity Reports (task completion form – automatically notifies clients when tasks are complete)
  - Time entry
  - Tasks
  - Schedules
  - Vendors
  - Mileage reimbursements/charges
  
- ***How does the billing work?***
  - Time sold in advance
  - Time deposited into the system
  - Charge time to client
  - When time is depleted, refill it



- ***Does the system send invoices?***
  - No, Essential Elements™ is not a financial system
  - We recommend three tools for your business – our data collection software, a calendar app and an accounting software
  - The only place we capture dollars is to track how much time you sell so you may identify seasonal trends and growth
  
- ***What type of reporting tools are available? (partial list)***
  - Employee timecards
  - Accounts to be refilled (charged for more time)
  - Hours by Client
  - Hours logs
  - Tasks Past due
  - Schedules Past Due
  - All Tasks (by company, employee, and/or client)
  - All Schedules (by company, employee, and/or client)
  - Mileage reimbursement by concierge/Mileage to bill to clients
  
- ***How will this software improve my operations?***
  - Data collection and management reduced to about 1 hr per week
  - Improved cash flow
  - Enhanced visibility to all your company data
  - Data collection can become a billable activity
  - Management by exception reports allow you to focus on what needs action instead of everything (80/20 rule)
  - Ability to analyze trends in sales and company growth which allows you to target your marketing and sales efforts
  - Historical data accuracy for the life of the system
  - Client visibility provides
    - A sales tool – “state of the art system provides full transparency to clients”
    - Enhanced credibility – clients can see everything you do
    - Instant gratification – clients can log in anytime from anywhere in the world
    - Clients can request tasks online 24-7



- ***What if I need the system to do something else?***
  - The system is customizable for
    - Functionality
    - Forms
    - Reports
    - Language
    - Currency
  
- ***How long does it take to setup?***
  - Database creation takes 1 week
  - Training takes 1-2 weeks depending on your availability
  
- ***What is included with the software license?***
  - All written procedures for the software
  - Full training and support
  - Database backups and security (no extra charge)
  - Server hosting fees (no extra charge)
  - Access for consulting and mentoring (no extra charge)
  
- ***How much does it cost?***
  - Setup is \$1000
  - Monthly license fees start at \$99/month
  - One year minimum commitment

**To get started:** Email Leslie Spoor at [info@conciergebusinesssolutions.com](mailto:info@conciergebusinesssolutions.com) and request sign up forms or a personal consultation specific to your business.

**Other products from Concierge Business Solutions®:** Webinars, training series, documentation for the concierge industry (forms, contracts, etc), consulting, mentoring, coaching, proposal support, policies and procedure creation, action plan development