

### Figure 3.1 Capitol Concierge Client Profile

#### 1. Contact Information

Client Name \_\_\_\_\_  
 Title \_\_\_\_\_ Company \_\_\_\_\_  
 Business Type \_\_\_\_\_ Email Address \_\_\_\_\_  
 Work Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_  
 Zip Code \_\_\_\_\_ Phone No. (work) \_\_\_\_\_  
 Phone No. (home) \_\_\_\_\_ Fax Number \_\_\_\_\_

#### 2. Personal Service Information

Account Number \_\_\_\_\_ Client Birthday \_\_\_\_\_  
 Single/Married \_\_\_\_\_ Spouse's Name \_\_\_\_\_  
 Age Range \_\_\_\_\_ Commuting Method \_\_\_\_\_  
 Type                          
 How does client contact you?  phone  at desk  fax  e-mail

#### Children:

Name	Age	Birthday

#### 3. Concierge Service Information

##### Entertainment preferences

Client has expressed an interest in or has purchased event tickets for the following:

Sports	Concert Preferences	Theater Preferences
<input type="checkbox"/> baseball <input type="checkbox"/> basketball <input type="checkbox"/> football <input type="checkbox"/> golf tournaments <input type="checkbox"/> tennis <input type="checkbox"/> hockey <input type="checkbox"/> soccer <input type="checkbox"/> ice skating <input type="checkbox"/> other _____	<input type="checkbox"/> rock/pop <input type="checkbox"/> jazz <input type="checkbox"/> symphony <input type="checkbox"/> country western <input type="checkbox"/> R&B <input type="checkbox"/> alternative Favorite Entertainer: _____	<input type="checkbox"/> drama <input type="checkbox"/> musicals <input type="checkbox"/> dance <input type="checkbox"/> opera <input type="checkbox"/> comedy <input type="checkbox"/> alternative Favorite show: _____
Favorite team: _____	Client purchases tickets for <input type="checkbox"/> him/herself <input type="checkbox"/> clients <input type="checkbox"/> premium tickets <input type="checkbox"/> face value only	

##### Recreation/Hobby Interests

water sports  boating  winter sports  
 horseback riding  hiking  biking  
 fishing  other \_\_\_\_\_

Favorite leisure activity \_\_\_\_\_

##### Washington Area Interests

nightclubs  museums  tours/festivals  B&B  other \_\_\_\_\_

##### Restaurants

Favorite Restaurants \_\_\_\_\_ Favorite Cuisine Type \_\_\_\_\_

##### Miscellaneous Favorites

Type of book \_\_\_\_\_ Type of movie \_\_\_\_\_  
 Flower \_\_\_\_\_ Candy \_\_\_\_\_  
 Magazine \_\_\_\_\_ fragrance \_\_\_\_\_

##### Client Gift Interests

Gift Services	Gourmet Gift Giving
<input type="checkbox"/> flowers / plants / balloons <input type="checkbox"/> cigars <input type="checkbox"/> books <input type="checkbox"/> sports items <input type="checkbox"/> novelty / electronics <input type="checkbox"/> gift baskets <input type="checkbox"/> children's items <input type="checkbox"/> other _____	<input type="checkbox"/> coffee <input type="checkbox"/> cakes / cookies <input type="checkbox"/> food / fruit baskets <input type="checkbox"/> chocolates <input type="checkbox"/> wine / liquor <input type="checkbox"/> gourmet meat / seafood <input type="checkbox"/> snack items (popcorn tins)

Gift certificates to favorite store \_\_\_\_\_

Client's favorite gift(s) to give \_\_\_\_\_

Client gives gifts to  family  friends  clients

##### Personal Services

Dry cleaning / laundry \_\_\_\_\_  
 Shirt starch preference \_\_\_\_\_ Frequency \_\_\_\_\_  
 Auto insp't'n due \_\_\_\_\_ Auto type \_\_\_\_\_  
 Parks where? \_\_\_\_\_ Schedule  weekly  monthly  quarterly

##### Travel

Primarily travels for  business  leisure  
 Frequency of business travel:  one or more times/wk  monthly  other \_\_\_\_\_  
 Destination/trip interests are  
 cruises  tropical resorts  family vacations  spa/sports  
 weekend getaways / B&Bs  
 tours:  
 foreign \_\_\_\_\_  US region \_\_\_\_\_  other \_\_\_\_\_  
 Recent trips taken \_\_\_\_\_  
 Limo / sedan service  special occasions  airport transfers





Figure 3.4 Personal Preferences Profile

http://demo.vipdesk.com/vip/svc\_preferences.asp? - Microsoft Internet Explorer provided by VIPdesk.com

File Edit View Favorites Tools Help eFax

Address http://demo.vipdesk.com/vip/svc\_preferences.asp? Go Links >>

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### Personal Preferences

Tell us more about yourself by completing or updating your Personal Preferences Profile. The more we know about your gift and lifestyle preferences, the better we can be of service.

### My Lifestyle Interests

(Check from one or more of the following)

<input type="checkbox"/> Food/Wine	<input type="checkbox"/> Health/Fitness	<input type="checkbox"/> Theatre/Music
<input type="checkbox"/> Art/Culture	<input type="checkbox"/> Business/Finance	<input type="checkbox"/> Toys/Games
<input type="checkbox"/> Home/Garden	<input type="checkbox"/> Sports/Recreation	<input type="checkbox"/> Travel/Leisure
<input type="checkbox"/> Fashion/Beauty	<input type="checkbox"/> Electronics/Technology	

### My Gift Preferences

(Check from one or more of the following)

### Favorite gifts to give:

<input type="checkbox"/> Flowers	<input type="checkbox"/> Chocolate/Gourmet food	<input type="checkbox"/> Gift baskets
<input type="checkbox"/> Gift certificates	<input type="checkbox"/> Toys and games	<input type="checkbox"/> Children
<input type="checkbox"/> Bar, wine and cigars	<input type="checkbox"/> Home and garden	<input type="checkbox"/> Bath and body
<input type="checkbox"/> Fragrances	<input type="checkbox"/> Electronics	<input type="checkbox"/> Jewelry
<input type="checkbox"/> Books/Magazines/Music	<input type="checkbox"/> Pet gifts	<input type="checkbox"/> Features of the day
<input type="checkbox"/> Luxury gifts		

### Favorite gifts to receive:

<input type="checkbox"/> Flowers	<input type="checkbox"/> Chocolate/Gourmet food	<input type="checkbox"/> Gift baskets
<input type="checkbox"/> Gift certificates	<input type="checkbox"/> Toys and games	<input type="checkbox"/> Children

Start | How to Do Stuff ... | http://demo.vipd... | Handouts - repai... | Internet 1:25 PM

## Opportunities for Customer Contact

Customer contact opportunities are everywhere. We've compiled a listing of twenty-four, but our list is hardly exhaustive. Use the examples to jumpstart your own communication plan. A few qualifiers are in order. The suggestions in this chapter don't rely on using outside consultants, but that said, there are times when you will want or need to hire professionals to get more objective customer feedback. By the same token, technology can enhance almost any contact opportunity, but the process of learning about customers does not depend on technology.

1. *Conduct short surveys on the phone.* This can be done with both customers calling in and by dedicating yourself and your employees to calling so many customers per month. The key is to keep these surveys respectfully brief. The phone is also great for following up on a written survey. For instance, the St. Paul Saints, a minor league baseball team that has won kudos for its customer service, conducted a satisfaction survey of fifteen hundred fans two years ago. Though the team hit a home-run response rate – fourteen hundred returned the survey – the front office called back a number of fans. (More than a few people willingly supplied their names and phone numbers.) The Saints' front office staff interviewed any identified fan who scored the team a 3 or lower (on a scale of 1 to 5) on any service attribute.
2. *Assemble a customer advisory board.* A handful of customers can't speak for all your clients, but these boards are a great way to get the kind of direct, honest, and complete feedback you might not get anywhere else. The meetings can be as formal or informal as you and your customers want, but to get the board started, send out official invitations.
3. *Organize client focus groups.* You might convene focus groups as often or more often than your advisory board. Rather than outsourcing the whole event, you can and should conduct the groups themselves. It's not scientific results you're after but meaningful conversation about upcoming products, customer service issues, past problems, etc. That said, it can help to have or hire an experienced moderator, particularly when you're conducting a large focus group with customers who might also

be competitors (such as a manufacturer that invites a roomful of competing store owners to review upcoming products). Breaking a large group into smaller ones can also help keep the meeting cordial and productive. Definitely use the opportunity to get written as well as oral feedback. It's also worthwhile to bring several employees for every one customer you invite. (A sample customer invitation letter and focus group agenda are shown in Figures 4.2 and 4.3.)

4. *Hit the Road.* This is another way to conduct informal focus groups with key customers that gets you out of your comfort zone and into theirs. Some CEOs believe so strongly in the value of road trips that they schedule one or two each year. Some companies stage mini-trade shows on wheels. Skyline Displays, a maker of trade show booths, stages free or inexpensive workshops on topics related to trade shows in cities around the country.
5. *Form a frequent buyer club.* Examples abound – both good and bad – but the clubs' popularity shows no signs of waning. Just make sure your club is distinct and rewarding. When they are well thought out, frequent buyer clubs are a great way to create a community and learn more about when and why customers buy. The best frequency/loyalty programs offer both hard and soft benefits. The more tangible benefits include merchandise, travel, or services; the soft benefits might encompass special discounts, advance notices of sales, and other courtesies.
6. *Create a VIP program.* This could be instead of or in addition to a frequent buyer club. At any rate, it's your chance to reward specific customers for specific actions (such as making referrals) while learning more about their personal likes and dislikes. Plus, everyone likes to win a prize. Preferred customer plans serve the same purpose.
7. *Birthday clubs and anniversary circles are another way to get customers' attention.* Send a special offer on special days. If it's appropriate, you might use such occasions to bring together groups of customers.
8. *Write a thank you note within forty-eight hours of a new purchase, contract signing, reorder, or referral.* It's easy to customize a standard thank you letter on the computer, but

handwritten notes still score major points with many buyers. Thank you notes might seem like one way communication, but they can also be the start of something more. A thank you note can also be accompanied by a book or magazine article of interest to the client – anything to spark the next conversation or email exchange.

9. *Follow up after a sale with a phone call thirty days later.* What better excuse to pick up the phone and take a quick read of customer satisfaction. Planner books – online or on paper – make this task a cinch.
10. *Schedule checkup visits.* Offer to return to the customer site at regular intervals for routine maintenance. It's an opportunity to fix any lingering problems the customer might be hesitant to raise. Such repair work might also lead to new work.
11. *Write an annual service plan for every new contract.* Update the plan throughout the year by checking in with the customer.
12. *Create a budget planner that anticipates a customer's purchases and tallies the costs involved.* Naturally the process involves sitting down with the client at least once and probably several times throughout the year.
13. *Postcard surveys can be tucked into purchases and thank you notes.* They can also be mailed out to mark a special occasion – such as the anniversary of a purchase or contract signing – but you don't have to wait that long to make use of the short form survey. Postcard surveys can also accompany raffles at special events.
14. *Get the maximum value from client reviews.* Whether you hold them monthly, quarterly, or annually, these are built in opportunities for detailed dialogue. Some companies also use these events to conduct their own industry research.
15. *Make monthly touch base calls to customers.* Divide up the call list among your key executives. Since customers are often assigned to midlevel account managers, it's critical for senior staff to keep their hands in the customer relationship as well. A simple "How are we doing?" call can reap huge rewards and uncover potential pitfalls in the relationship.

16. *Do "Lunch and Launch" events.* Invite key customers to preview new products and services. Solicit feedback that can assist your team in improving the product. Learn which features bring the greatest value to your customers and emphasize those in targeted, individualized marketing pieces.
17. *Actively solicit customers to serve as references.* You'll get immediate and invaluable feedback. If the customer isn't willing to be a reference, you'll know why. Those who agree to send you business will help further cement your relationship. Rockford Construction, a \$100 million plus builder in Belmont, Michigan, never misses a chance to get a new reference. In fact, on the last day of a job the company immediately sends an account executive to the construction site to get a letter of recommendation. Rockford's customer account teams are rewarded for each letter collected.
18. *Enclose a short questionnaire with each invoice.* It saves stamps, but more important, when a client pays the bill, it's the ultimate evaluation. If there are any unresolved issues with the customers, better to hear about them quickly than after your invoice has sat on somebody's desk for ninety days.
19. *Take them out to the ballpark.* One creative company invited key clients to a baseball game and made a product presentation in the stands before the first batter was up. Then everyone sat back and enjoyed the game. The company not only had a chance to get to know its clients as individuals, but the clients got to talk to each other. And they had fun.
20. *Take the customer suggestion box seriously.* Whether the comments come by phone, fax, letter, or email, they should be acknowledged with a phone call or at least a short thank you note and perhaps a follow up question.
21. *Don't underestimate the value of asking a first time customer for help.* You may find to your surprise that people are flattered to help – especially if you make customers feel like they have a stake in putting your company on the map. For example, Next Monet, which sells original art through a catalog and on the Web, sent one hundred surveys to its first group of customers in 1999. The accompanying survey letter was worded as an appeal "to help Next Monet." Customers complied; the response rate to the twelve question survey was 100 percent.

“We found out we had a tremendously loyal following,” says Next Monet cofounder Myrna Nickelsen. “They wanted us to succeed.” Though it’s rare to see customers wax poetic in a written survey, Nickelsen says customers wrote long paragraphs about the service they had received and even named their favorite customer service reps.

22. *Vet purchases at the point of sale.* At Sunny Fresh Foods, a supplier of egg-based food products to hotel and restaurants, customer service reps pore over orders that come in electronically, looking for potential omissions. “If the order doesn’t look right, we call,” says Mike Luker, CEO of the Monticello, Minnesota-based company, which won the Baldrige Award for Quality in 1999. “We might say, ‘You buy this every week, but you didn’t this week. Is this a problem?’” The CEO views customer service as a crucial communications opportunity. In fact, the service reps “touch” the company’s two thousand regular customers more frequently than the sales reps do, Luker adds.
23. *When you lose a sale, put your pride aside, and you may just save a customer.* It takes guts to ask customers what they *don’t* like about you, but you’ll learn so much more. At the same time you’ve got a second chance to establish a stronger bond with customers who care enough to tell you the unvarnished truth. Take the time to create a “Lost Job Survey.”
24. *Create a reminder service for customers based on past or future purchases.* Talk to customers about what they bought this time last year or last month. To prompt a reminder, use both historical orders and “proactive dates,” secured by asking clients about special events.

Figure 4.2 Sample Customer Invitation Letter

Mr. Bob Jones  
ABC Corporation  
123 Main Street  
Denver, CO 02134

Dear Mr. Jones:

Our goal is to be the best provider of consulting services in the Denver market. Your comments and suggestions are vital to assist us in achieving this goal. We are inviting valued clients from varied industries to participate in a series of focus groups over the next year. The focus groups will engage in small, informal discussions to obtain your opinions on our service.

\_\_\_\_\_ would like to invite you to participate in the first of our Client Focus Group series on Thursday, February 17 at 12:00 p.m. at the Omni Hotel. The Omni is located at 125 Spruce Street, Denver, Colorado. Complimentary lunch and beverages will be served. The topic of our discussion will be a review of the current service offerings of \_\_\_\_\_. Additionally, we hope to glean advice on continuously increasing our level of service. Please respond to \_\_\_\_\_ by February 14. We look forward to seeing you on February 17.

Sincerely,

Kelly Gilmore

Figure 4.3 Sample Focus Group Agenda

- I. Welcome and Introduction of Attendees
- II. Purpose of Meeting  
[Introduce new product or service and assess customer needs]
- III. Overview
- IV. Potential Questions
  - How well do we deliver on what we promised?
  - What are the three changes that would make it easier for you to do business with us?
  - Are you personally involved in making decisions about loyalty programs?
    - What other departments are involved in making those decisions?
  - What kinds of loyalty programs do you presently have in place?
  - What drove your decision to use this service?
  - How valuable overall would you say this service is for you to achieve your goals (somewhat, fairly, very, or extremely)?

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The focus groups can be done very cost effectively with a breakfast or luncheon or done after work with hors d'oeuvres.

## The Role of Technology

Once upon a time, entrepreneurs knew everything there was to know about their customers because they weren't just customers; they were neighbors and friends. What possible need did the corner barber have for a Palm Pilot or a contact management program? He carried what counted in his head or in the collective memory of his small shop. Wireless communication? Well, how about shouting down the street?

Of course, those days passed many eons ago. In the new millennium it's clear that nearly everything about the way we relate to and communicate with customers has changed. How we come into contact with customers has been forever altered by one technical innovation after another. Today no one can imagine life without electronic mail. A popular book on business manners now devotes a chapter to email etiquette. Contact management programs are affordable to all, which means keeping a customer database is easier than ever.

Meanwhile, clever direct marketing solicitation letters are typeset in script fonts that look convincingly like someone bothered to pen a personal message. The mass personalization of the direct mail pitch letter is a fitting symbol for the true promise of technology: that we can have it both ways; we can be personal in our interactions with customers even as we connect with dozens or thousands of them at the same time.

Where will all the technology lead? How far should a company travel on the technology curve to attract and retain the best customers? For every I/T investment there's a cost benefit calculation a company must do as well as an internal audit. You have to ask yourself first and foremost how paramount is it to forge individual relationships? With how many of your customers? For example, a company that sells mainly through distributors may or may not have a compelling reason to get in touch with the actual end users or consumers of the product. Perhaps distributor feedback is enough to give the company the inside scoop on how customers are thinking and feeling, but such an assumption can also be very dangerous. There is a real tradeoff to outsourcing any aspect of customer contact. Another example: *call centers* can be a great way for a small company to train more "ears" on the customer. But call centers can also present a barrier between

you and your clients. On the other hand, no call center will ever know your product or service the way you do.

You should view technology as a means to carrying out your customer chemistry communication plan – but not the only means. At its best, technology makes the promise of a continuous learning relationship with customers a reality. That doesn't mean, however, that you must become a 24/7 operation. Consider some of the opportunities for making contact brought by technology, from the simple to the more complex. Based on information gathered from customer service gurus, other company owners, and on our own customer service research, here's our tally of the best ways to use technology to enhance customer retention.

- *Automate the customer reminder service.* This can take the form of a fax or email message.
- *Customize your response to customer comments.* With the ease of cut-and-paste and the speed of email, there's no reason any company should send the same response to every customer who takes the time to write, call, or send email. Stew Leonard Jr., the grocer, personally answers about ten email messages from customers every day.
- *Response to orders by email.* Fulton Street.com, a seller of seafood products online, routinely sends a customized thank you note after each order is received. Repeat customers are acknowledged as such. CEO Stratis Morfogen explains: "We started by doing five orders a week, addressing each customer by name. 'Thank you, Mrs. Jones, for your recent order; my name is Joe, and I will be your personal customer service rep.' My goal was to break down the computer barrier and make the online experience as simple as a handshake."
- *Send your postcard customer surveys by email.* It's faster.
- *Solicit opinions via an email newsletter.* Electronic mail is a great publishing medium for a variety of reasons. An email newsletter is immediate and cheap to produce. You can ask a weekly or monthly question to solicit opinions on pressing business issues of the day or to solicit product feedback. The newsletter can also be position as a perk for joining an

online fan club or frequent buyer club. As a prospecting tool, email newsletters allow you to politely ask would be subscribers to identify themselves and answer a few pertinent questions. The answers give you at least a starting point for comparing the new prospect's profile to that of your ideal client.

- *Allow customers to register their personal preferences on a secure area of your website.* (Refer to Fig. 3.4 for a sample form.)
- *Put the frequent buyer club online.* Let customers check their status as often as they want.
- *Post interesting spot polls at your website.* Lid, a specialty retailer of baseball hats, has done a great job interacting with its teen and preteen audience at its website, lids.com. A poll last December consisted of two words: "Holiday Shopping?" Respondents were asked where they were buying gifts – online, in stores, in catalogs, or a combination. While such topical questions don't yield specific product feedback, there's still great value in asking them. Lids' holiday shopping poll, for example, revealed that teenagers are not the mall rats many think they are.
- *Design your website for customer feedback.* Encouraging public discussion is one way to do this. Of course, with discussion groups you lose some measure of control; angry customers may also pop up online, but that's not a good enough reason to dismiss a potentially very powerful tool. A more private alternative is to set up an extranet for certain customers who'd benefit from posting messages to each other and to you.
- *Get customer feedback in real time.* If you're selling to a big enough base of consumers, you can get customer feedback at the point of sale by signing up with a third party rating service online (such as Bizrate.com). Or you can do a version of what Bizrate does yourself. For example, you can send a short survey to email immediately following a key event. Many of the off-the-shelf contact management programs let you automate the process of sending out surveys on a timed basis.

- *Talk to customers all day long for free.* E-chat programs are easy to install and most are free or very cheap. AOL's Instant Messenger (AIM), Microsoft's MSN Messenger, and ICQ ("I seek you") from Mirabilis – to name three programs – are all free and independent of your choice of Internet provider. AIM is used by sixty-four million chatters internationally, according to AOL. Some companies, like Granny's Goodies, are offering live chat from nine to five – a good option for any company with a limited number of employees who can answer chat while also manning the phones. Chat sessions can also be used to convene virtual focus groups. You won't capture the body language, but you will get pages of verbatim responses from your assembled group of preselected customers while saving a ton on travel and hotel bills.

Of course, it's easy to get carried away with the latest technical twists. All those bells and whistles can be like a siren song drawing you in and taking you under. Consider a potential technology investment from the viewpoint of both your employees and your customers. Online chat, for instance, is a subject that polarizes many people. They seem to either love it or hate it; some find it one of the most useful tools on their computers, others regard chat as nothing more than a distraction.

"In my experience, the advantages of using chat are numerous," says Maggie Etheridge, cofounder of IRIS, a \$4-million developer of residential real estate software in Anaheim Hills, California. For either years Etheridge directed the company's customer support department. During that time she found that chat "erase former imaginary obstacles to communication. It suggests preferred status. And it has advantages over both the telephone and email."

### Figure 3.5 Property Management Budget Planner

Simply place a checkmark (✓) in the month

	January	February	March	April
<b>Lobby Events</b> – CC, Inc. will submit proposal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Office Managers' Luncheon</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Community Involvement Events</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Art show – HS and senior citizens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vacation fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sports fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cyber fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local musicians – during lunch hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health – wellness fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Charity Events</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Cancer Society	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blood Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Supply Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can-U-Care Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clothing Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Angel Tree Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thanksgiving Family Meal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AIDs Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grandma's House	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tenant Gifts</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holiday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lease Signers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tenant Orientation / Roundtables</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>New Tenant Move-Ins</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Renovations</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Lobby Decorations (December)</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Building population \_\_\_\_\_

Annual tenant \_\_\_\_\_

Number of tenants \_\_\_\_\_

Tenant anniversary list \_\_\_\_\_



**EVENTS PLANNING**

Which events do you have on your corporate calendar? (Check the month in which the event is planned.)

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Company anniversary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff holiday party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corp / staff retreats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual board meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open house	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Summer associates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secretary's week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partners' meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide us with the following event information/resources/ideas/pricing for:

- catering
- flower arrangement
- weekly drop off breakfast/lunch
- decorations
- entertainment
- off-site locations
- invitations
- event staffing
- equipment rental
- transportation
- logo gift items
- other \_\_\_\_\_

**FINALLY, ABOUT YOU ...**

YES, I want to receive announcements of special offers, discounts, and services.

Your name \_\_\_\_\_

Your title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

- I completed the service research survey on the back page and I want to be entered into the prize drawing.

THANK YOU for your time and interest. Simply forward this information to Capitol Concierge and *Consider It Done!*

1. Fax to 202.833.2287
2. Give to your Concierge
3. Mail to Capitol Concierge, 1400 Eye Street, NW, Suite 750. Washinaton. DC 20005



## PROPOSAL EVALUATION

Please identify the following items that affected your decision *not* to accept the proposal submitted by VIPdesk. Please be completely honest, as your comments are very important to us and your responses will remain confidential. Also please note any questions or suggestions you may have on this form.

Thank you for your assistance.

Sincerely,

Mary Naylor  
CEO

### SECTION 1

1. **Were any of the following a major factor in your decision not to accept VIPdesk's proposal?**

- a. Price  yes  no
- b. VIPdesk's staff structure  yes  no
- c. Service offerings  yes  no
- d. Established relationship with another concierge firm  yes  no

2. **Please list the main reason(s) why VIPdesk was not awarded the concierge services contract.**

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3. **(Optional) Name of the firm awarded the contract:** \_\_\_\_\_

4. **If price was the reason for losing the contract, by what percentage was VIPdesk's price higher than that of the selected firm?**

- less than 3%       3-6%       6-10%       more than 10%

5. **If service offerings were the reason for losing the contract, what services are not offered by VIPdesk that are offered by the firm awarded the contract?**

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6. **Would you consider allowing VIPdesk to rebid when the current contract expires?**  yes  no

**May we contact you?**  yes  no

**Date:** \_\_\_\_\_

**SECTION 2**

Please rate the effectiveness of the presentation made by VIPdesk’s staff as well as the final proposal submitted. (1 = lowest rating, 5 = highest rating)

- 7. **Receptiveness and understanding of your company’s needs and objectives.**  
1      2      3      4      5
- 8. **Presentation of VIPdesk’s capabilities, service offerings, and recognitions.**  
1      2      3      4      5
- 9. **Presentation of proposal and VIPdesk’s fee structure.**  
1      2      3      4      5
- 10. **Willingness and ability to answer all of your questions.**  
1      2      3      4      5
- 11. **Clarity of proposal.**  
1      2      3      4      5
- 12. **Demonstrated respect for competition.**  
1      2      3      4      5
- 13. **Timeliness of proposal after initial contact.**  
1      2      3      4      5
- 14. **Timeliness of follow up after proposal submitted.**  
1      2      3      4      5

Additional comments, questions, or suggestion:

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Thank you for your comments. Please fax your responses to 202.299.9767 or mail to:

324 N. Fairfax Street  
Alexandria, Virginia 22314

A return envelope is included for your convenience.



# Sample Program Report Card

Key: 4A, 3B, 2C, 1D

Critical Success Factors	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	YTD	AVG
<b>Quality</b>														
Service standards met														
Request turnaround time														
Concierge performance														
• Addressed customers appropriately														
• Provide accurate and complete responses														
• Capture appropriate data														
• Proactive in exceeding customers' expectations														
• Present information in a polite and professional manner														
• Keeps customers informed of status														
<b>Technical</b>														
Web site availability														
Toll free availability														
Responsiveness to technical issues														
Flexibility in reacting to business needs														
Innovations in developing solutions to technical requirements														
<b>Marketing</b>														
Quality of materials														
Quantity of options														
Availability to assist with initiatives														
Innovation in creating program to suit individual goals														
<b>Account Management</b>														
Provide sales support as needed														
Responsiveness														
Proactive in developing action plan to meet program goals														
Communications														
Invoices are accurate and timely														
Incident resolution														
<b>Reporting</b>														
On time														
Accurate														
Provides needed information														
<b>Overall Program Satisfaction</b>														
<b>Comments</b>														
<b>Suggestions</b>														