

Table of Contents

Reading Tips5

Introduction.....7

Are You Ready?9

Chapter One 11

 Senior Concierge Services..... 11

 Grocery Shopping Tips..... 15

 Just Another Pet Care Day !..... 25

Chapter Two 34

 Setting Up Your Senior Concierge Service..... 34

 Pick a business name 35

 File for licenses and permits..... 36

 Business Insurance..... 37

 Taxes & Accounting..... 38

 Business Plan..... 41

 Free help to start your new business 43

Chapter Three..... 49

 Finding Your Customers 49

 Your Own Senior Concierge Website..... 51

 Sample Senior Concierge Website..... 54

 What To Do When A Prospect Calls You 59

 Follow Up With Prospects 60

Chapter Four 61

 Understanding Seniors 61

 Difficult Clients..... 65

Chapter Five 66

 Senior Concierge Forms 66

Chapter Six 83

 Working with Service Vendors 83

 How to Find Reliable Vendors 83

 How to collect commissions from vendors 85

Chapter Seven..... 87

 Resources 87

If you're not able to handle the selling part for your client, there are individuals who specialize in listing and selling items on Ebay for a fee, usually about 30% of the final sale price. To find an "Ebay helper" to assist you, visit: www.sellforme.ebay.com Another option, but one that may not bring in as much money, is a good old-fashioned garage sale.

5. **Escort service.** Seniors who no longer drive need an escort to get them to social events and church services, and to be a companion while there.
6. **Grocery shopping.** Not everybody likes to shop for groceries, so this is one of the most popular services for a senior concierge. Also, there are seniors who have no choice, such as homebound seniors, or those with health issues or a handicap, that prevents even a simple trip to the supermarket.

For all those seniors who are too busy or unable to get to the store or just dislike grocery shopping, hiring a personal grocery shopper can be the perfect solution, and one that more and more are choosing. Having someone do the grocery shopping can even save money for many clients, who lose control at the supermarket, buying products they don't really need or shouldn't eat. That's why the snack food aisle at the supermarket is so large!



Chapter Three

Finding Your Customers

A capable and dependable senior concierge is hard to find. If they are good at what they do, they will always be in demand and working as much as they choose. Once you've had a few clients to give you 5-star recommendations, you can expect to be busy.

But when you are just starting out, you do not have a track record or a stellar reputation in the senior community, so you will need to advertise in order to get your first clients. Here are the best ways to find clients:

1. **Free Ads.** Don't waste your money on newspaper ads – there are plenty of ways to advertise for free. Many senior service businesses have found a simple ad, repeated regularly on Craigslist.org can bring in a steady supply of new prospects. Here is a sample ad you can adapt for your own use:

At Your Service – Senior Concierge
Call Today For Help Today
What We Do:
Home helper service & errands
Conversation & companionship
Pickup and deliveries
Write letters & pay bills
Assist with pet care
Shop for groceries
Organize your home
Supervise home maintenance
Computer assistance
If you don't see it here – just ask!
Free Consultation – Licensed, Bonded, Insured
Your Business Name & Phone number

Chapter Five

Senior Concierge Forms

In the pages that follow, you'll find the essential forms for your new senior concierge service. As a purchaser of this guidebook, you also may copy, adapt and use these forms for your own concierge service only.

These forms have not been reviewed by an attorney, and are meant as a guide only. We encourage you to have an attorney review the forms to ensure they are appropriate for your specific needs and the laws and regulations that apply in your state and city or town before you use them.

New prospect form. Keep several of these forms near your phone so you can get enough information written down when a prospect calls to decide: Is this someone I can help? Do I have the necessary skills to do a good job for this client?

After you have had a chance to chat with the new prospect, suggest a meeting to go over the client's needs and what you can do for them. The first meeting will usually take between one-half to one hour. Your goal is to establish trust and confidence, and bring up any special skills or experience you have that would make you a good fit with the client.

Begin the meeting by discussing areas where the client needs assistance, such as transportation or meal preparation. If the client or a family member agree, check that box, then review the next item, until you have reviewed all the service possibilities. Be sure to ask if there are other areas they would like to discuss.

Don't forget, at this first meeting, that you are an unknown to your potential client, so smile and be positive about what you can do to help, and be patient and understanding with them.

Bring a **service agreement** and a **client information form** to the first meeting. If things go well, you can get both forms completed and have the client or a family member sign the service agreement.

Service agreement. This agreement spells out the working relationship between you and your client, which may be the person you will be helping, or a “responsible person,” such as a son, daughter or guardian. To help prevent misunderstandings, this agreement spells out the services you will be providing, the hourly rate, any surcharges, mileage charges and your cancellation policy.

Client information form. This information should be filled out with the help of the senior you will be helping, or the person who is responsible for their care. It covers emergency contacts, physician contact information, any known allergies or diet restrictions, and a brief summary of the client’s medical condition.

Key release form. The key release form is used if you need a key to access your client’s home for tasks such as pet sitting or to deliver groceries or other purchases when the client is not at home.

Grocery shopping agreement. The grocery shopping agreement, grocery delivery order form and grocery list make it very easy for your client to spell out in detail what they want and when they want it. Leave extra order forms and lists with your regular customers, and be sure to put your phone number on all forms to make it easy for a client to reach you. The grocery list is a great “memory jogger” for senior clients, as they can easily look over the checklist to find items that may not have added to the purchase list.

Pet sitting agreement. This agreement will help you remember all the small details about a client’s pet, from names to special instructions for feeding and medications. Many seniors worry more about their pets than themselves, so this form will give them confidence in your ability to take care of every last detail.

Errand log sheet. Carry these forms with you at all times, so when you are running errands, you can accurately track mileages, costs and time.