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*Todd Wheeler, president and CEO of Concierge Colorado and Hospital Concierge of America, knew his contact-tracking system needed an overhaul, and found a solution in InfoStreet StreetSmart.*

### **Q: What's so important about efficient data management?**

**A:** Concierge serves several thousand customers, helping people balance their work and life, and companies with employee retention. For the past eight years, we had used contact tracking systems, Excel spreadsheets, file sharing, to-do lists and mail programs, and we were going all over trying to manage a business with 16 different programs. We started using StreetSmart to track the requests we receive.

### **Q: What are some improvements with the new service?**

**A:** Data entry time has dropped 40%, and search time has fallen by almost 90%. We are able to give all of our employees access to the full database. It allows employees from different

locations much better access to data much more quickly. I can find customer data, pull up credit card numbers and see the request they made.

**Q: How did the change improve your customer service?**

**A:** Several years ago we had a client who ordered a bottle of Cognac for his father for Christmas. He called us two years later and said, “Can you ship that same thing?” With the new system we were able to pull up which brand of Cognac he used, the customer's name, and his dad's name and address, all at once.

**Q: How did you improve your mailing lists with the program?**

**A:** Primarily, we can build and create mailing lists without having to get a third party involved. It allows us to gather, compile and control lists. I've used the software for mailing specials and heads-ups to our customers, newsletters and reminder e-mails of important dates.

**Q. Have you taken on more clients since implementation?**

**A:** From a client standpoint, we had a 40% increase this year. We've just added another corporate client. Our other clients are hospitals, so this allows us to go into the private sector. We took on a client with 300 employees, and we didn't even skip a beat because the system could handle so much. Typically, in the concierge industry, 10%-15% usage in the first year means you're doing well; we got more than 60% of this company's employees registered in the first three weeks.

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