

How The Concierge Club Manages Premium Experiential Events with Function Point



Experiential marketing is one of the most operationally complex disciplines in the creative agency world. Every campaign is a live event, a high-stakes, multi-vendor, deadline-driven production where a single missed detail can unravel months of planning. For agency owners managing this kind of work, the difference between profitability and over-servicing often comes down to one thing: **operational visibility.**

The Concierge Club, a premium, **full-service event and experiential marketing agency** operating across Canada and the United States, knows this better than most. Founded in 2011 by Monica Gomez, the agency has grown from a brand ambassador staffing firm into one of **North America's leading experiential marketing agencies** producing immersive brand activations, luxury corporate events, and high-impact campaigns for some of the continent's most recognized brands.

Their story with Function Point's agency project management software is a practical lesson in **what happens when a creative agency replaces fragmented, error-prone workflows with a single, purpose-built platform for agency operations.**



2011

FOUNDED

2

COUNTRIES
(USA & CANADA)

14+

YEAR OF OPERATIONAL
EXCELLENCE

ABOUT THE CONCIERGE CLUB

A Premium Experiential Agency Built on Elevation and Detail.

Founded in Toronto and now operating on both sides of the border, The Concierge Club has built its reputation on a simple but demanding philosophy: *every experience they produce must be exceptional.*

From intimate influencer events to large-scale brand activations, the agency operates with a premium lens that leaves no detail to chance.

What started as a brand ambassador staffing business evolved — driven by client demand — into a full-service experiential marketing and event production agency. By 2014, The Concierge Club was producing end-to-end events and brand activations.

By 2022, they had expanded into the United States, where the scale of client budgets and the volume of activation opportunities represented a significant growth frontier.

Monica Gomez, Founder and CEO, describes the agency's positioning plainly:

“We operate with a very premium lens. Everything we do is very detail-orientated and we're always looking to elevate the experience for our clients.”

— Monica Gomez, Founder & CEO,
The Concierge Club

That commitment to excellence extends behind the scenes.

Delivering premium experiential marketing at scale — across multiple markets, with complex vendor networks, real-time budgets, and demanding client expectations **requires infrastructure that matches the ambition.**

That's where **Function Point's agency management software** enters the picture.

The Challenge

Too Many Systems, Too Much Room for Error.

Before adopting Function Point, The Concierge Club's operational stack looked like that of many growing creative agencies: functional, but fragmented.

Time Tracking

Time tracking lived in Toggl.

Project Management

Project management & budgeting lived in Google Sheets and Excel documents.

Schedules

Work-back schedules were built manually.

Estimates

Estimates were assembled file by file.

For a boutique agency in its early years, the patchwork approach was manageable.

But as the volume and complexity of projects grew and as the agency scaled into new markets **the cracks began to show.**

The core problem wasn't any single tool it was the absence of a unified system.

Teams were context-switching between platforms to track time, build budgets, and manage deliverables. That fragmentation created friction, duplication of effort, and the ever-present risk of costly human error on client budgets.

The turning point came through The Concierge Club's fractional CFO, who had previous experience with Function Point and recommended it as the agency's operational foundation. The brief was clear: **find one platform that could handle project management, time tracking, and budget management and do it in a way that was actually built for agency workflows.**



“ It was just choppy for us. There were too many different systems. There wasn't one budget management tool. Human error comes into play when you're doing all these sheets. ”

— Monica Gomez, Founder & CEO, The Concierge Club

“It felt like it was built for marketers exactly what we were doing. There are other budgeting tools out there, but this one felt right for agency world. Being able to put in our different pricing structures made it plug and play for the team.”

— Monica Gomez, Founder & CEO, The Concierge Club

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Why Function Point

Built for Agency World: The Moment Everything Clicked.

The Concierge Club has been using Function Point for approximately two years. Monica recalls the early realization that this was the right platform not as a single dramatic moment, but as an immediate recognition that **the software spoke the language of agency operations.**

Two capabilities stood out immediately: **integrated budget management and time tracking living in the same platform.** For an experiential agency where account management hours can balloon quickly and margin erosion happens in real time, having both visible in one place was transformative.

The budgeting templates, in particular, made it easy for client service teams to build out detailed project estimates, incorporate vendor quotes, and **maintain financial visibility from kickoff through delivery without toggling between disconnected tools.**

Connected Workflow, Complete Control

How The Concierge Club Runs Every Event Through Function Point



Function Point in Action

One Platform. Real-Time Visibility. Fewer Surprises.

Today, Function Point serves as The Concierge Club's central operational hub for **agency project management the single source of truth where project budgets, time entries, and financial reporting converge.**

The platform has replaced the fragmented spreadsheet-and-Toggl workflow with an integrated system that keeps the entire team aligned.

The features The Concierge Club relies on most:

Budget Management

Purpose-built budget templates that match agency pricing structures and allow teams to build detailed estimates quickly, incorporating external vendor quotes alongside internal resource costs.

Integrated Time Tracking

Time entries tied directly to jobs and budgets, so account management hours are tracked in the same place as financial data, giving leadership real-time visibility into how projects are tracking against margin goals.

Reporting & Client Transparency

Downloadable time and budget reports that provide concrete, auditable data when clients question hours. The ability to pull a report on demand has strengthened The Concierge Club's credibility and helped protect revenue on disputed scope.

Resource Planning (In Discovery)

The agency is actively exploring Function Point's resource planning capabilities after discovering they could replace a separate tool they had been evaluating. The Concierge Club's financial controller is currently configuring this within the platform adding another layer of operational intelligence without adding another system.

The Impact

From Over-Servicing Risk to Operational Confidence

The most tangible operational impact Function Point has delivered for The Concierge Club is visibility, specifically, the ability to see how a project is tracking against budget and hours in real time, rather than discovering overages at the reconciliation stage.

“What happens is the team gets so caught up in executing the project, and then any sort of red flags or scope creep, or we’re about to go over hours. All of that gets missed until the final stage. When you’re reconciling, it’s like, oh my God, we were over by 20 hours. But we never went back to the client to flag it.”

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— Monica Gomez, Founder & CEO, The Concierge Club

In experiential marketing, scope creep is an ever-present risk. Teams get absorbed in execution. Hours accumulate. And without a system that surfaces that data in real time, **the first indication of a problem is often the final invoice by which point it’s too late to go back to the client.**

Function Point is now being configured to address exactly this gap enabling the team to monitor project hours against budgets in real time and proactively communicate with clients before scope becomes a problem. This represents a meaningful shift in how The Concierge Club manages project profitability and client relationships.

Time tracking data has also become a strategic asset for project estimation. Because hours are now consistently tracked against completed jobs, the team can reference historical data when scoping similar projects **building estimates with confidence rather than guesswork.**

“When a client pushes back on hours, you can very easily go and download a report and they can see we’re not just making these up. We’re actually tracking them. And because we track hours, when similar projects come in, we can go back and say, comfortably, we think we can do it in this amount of hours. We have data.”

— Monica Gomez, Founder & CEO, The Concierge Club

This feedback loop, from time tracking to historical data to sharper estimates, is one of the most underappreciated compounding benefits of agency project management software.

The longer an agency uses Function Point, the more precise its operational intelligence becomes.



Looking Ahead

A Platform That Grows With the Agency

One of the consistent themes in The Concierge Club's experience with Function Point is discovery: **the ongoing realization that the platform can do more than the team initially realized.**

Resource planning, which they had been considering a separate tool for, turned out to be a native Function Point capability. Budget template configuration is actively being refined. **New features are being uncovered as the agency's financial controller digs deeper into the platform.**

“We keep uncovering different resources that we can use in the platform. It almost becomes more and more beneficial. We were going to use a totally different resource planning tool and then Michelle, our financial controller, said, wait — I think Function Point can do this. So she did a call with your team, they took her through it, and now we're looking at doing it all through Function Point.”

— Monica Gomez, Founder & CEO,
The Concierge Club

This pattern — of progressive discovery and deepening platform utilization — is a hallmark of agency management software that is genuinely built to scale.

As The Concierge Club continues to grow its U.S. presence, takes on larger brand activations, and expands its team, Function Point is positioned to grow with it: **adding operational layers without adding operational complexity.**

The Takeaway

What The Concierge Club's Story Means for Your Agency

The Concierge Club's experience with Function Point mirrors what creative agencies across North America discover when they move **from fragmented tools to a unified agency management** platform:

Less human error

Better financial visibility

Stronger client conversations

Operational foundation to scale



For experiential marketing agencies, event production companies, and creative shops managing complex, multi-vendor projects, the cost of staying in spreadsheets isn't just inefficiency, it's margin:

Scope Creep

It's scope creep that goes undetected.

Estimates

It's estimates built over guesswork instead of data

Revenue

It's revenue left on the table because you couldn't prove the hours.

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It helps to minimize human error that's probably the biggest one. A lot of agencies are still working off Excel documents. And it keeps everything organized in one location, because that's a real struggle: you have a system that does this, and a system that does that, and you're moving across all these different platforms. Function Point streamlines everything into one system. ”

— Monica Gomez, Founder & CEO,
The Concierge Club

Ready to See Function Point in Action?

For agency owners evaluating their operational infrastructure, Monica's experience is a compelling case for investing in the right foundation early before growth exposes the cracks in the systems holding everything together.

OPERATIONAL CONTROL

One platform for time, budgets & reporting.

REAL-TIME VISIBILITY

Catch scope creep before the final invoice

BUILT FOR AGENCIES

Agency-native workflows, not adapted software

Unlock Real-Time Profitability