

Hotel System Evaluation Workbook

This workbook helps you compare hotel management systems side by side, prioritize what matters most, and record your findings from trials or demos. Designed for small hotels, inns, and B&Bs.

Must-Have Features

Category	Feature	Why It Matters
Bookings & Availability	Real-time availability sync across channels	Prevents double bookings and manual updates.
Direct Bookings	Commission-free website booking engine	Reduces OTA dependence and increases profit.
Direct Bookings	Mobile-friendly booking engine	Guests book on their mobile phones.
Usability	Simple, intuitive interface	Staff can learn it quickly – crucial for small teams.
Customer Support	24/7 live chat or fast response	Quick help when something breaks on a weekend.
Reporting	Basic occupancy and revenue reports	Needed for daily and monthly decision-making.
Mobile Access	Works smoothly on smartphones	You'll often check reservations on the go.
Integrations	Channel manager + payment gateway	Connects key tools without extra steps.

Nice-to-Have Features

Category	Feature	Why It's Optional
Revenue Management	Dynamic pricing or yield management	Great for bigger hotels, less critical for 10-room inns.
Guest Engagement	Automated upsells and chatbots	Useful for routine updates, but personal interaction remains your biggest asset in small-hotel hospitality.
Marketing Tools	Email campaigns or loyalty modules	Can be handled externally (e.g. Mailchimp).
Advanced Reporting	Custom dashboards or exports	Valuable if you scale, not essential for early use.
API Access	Custom integrations	Only relevant if you have in-house tech help.
Housekeeping App	Separate housekeeping interface	Helpful, but not vital for smaller teams.

10 Essential Questions to Ask vendors

1. How long does setup and onboarding typically take?
2. Is training or support included in the price?
3. Can the system handle both OTA and direct bookings?
4. Is mobile-friendly for both guests and staff?
5. What integrations (PMS, payments, channel manager) are available?
6. How are updates and maintenance handled?
7. Are there limits on rooms, properties, or users?
8. What's the typical uptime/reliability percentage?
9. What reporting tools or analytics are included?
10. How transparent is pricing - are there any hidden fees?

System Comparison Table

Before you fill in this table, tick your must-have features above. Then, as you trial each System, record how well it meets your needs. Use 1-5 scores or short notes under each category.

Criteria	System A	System B	System C
Ease of Use (1-5)			
Customer Support (1-5)			
Integration Options (1-5)			
Reporting & Analytics (1-5)			
Mobile Accessibility (1-5)			
Setup Time			
Pricing Model			
Pros			
Cons			
Overall Fit (Yes/Maybe/No)			

Use this workbook each time you evaluate a new system. Revisit your must-haves annually – as your property grows, some nice-to-have features may become essential.

Tip: Copy this checklist into Google Sheets so multiple staff can score systems together during trials. It turns subjective impressions (“I like it”) into measurable comparisons.