



The 2019 Smart Decision Guide™ to Hotel Property Management Systems

Everything you need to know about next-generation hotel property management systems – and how to select the right one for your business



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Introduction

The vast majority of hotel operators have plenty of reason to celebrate. In the United States, revenue per available room (RevPAR) increased 3.5 percent year-to-date through July 2018, according to research firm STR, compared to a 2.7 percent increase during the same period the year prior, putting 2018 on track to mark the industry's ninth straight year of continuous RevPAR growth. Meanwhile, year-end average daily rate (ADR) growth was on track to reach an impressive 3 percent, according to Moody's Investor Service. Hotels in other regions of the world — in particular, upscale properties in popular destinations — showed similar gains.

Yet, despite these glowing numbers, not everything is smooth sailing in the hotel industry. Significant challenges abound. Among these challenges are the hefty commission structures imposed by online travel agencies (OTAs) that continue to take a big bite out of hotel profits. While major hotel groups have begun to push back, investing in marketing campaigns that promote direct bookings with discounted loyalty member rates, the results of these efforts have been decidedly mixed. Another challenge is the rapid growth of Airbnb (and other, smaller online marketplaces operating in the so-called sharing economy), which already account for a 1.5 percent annual loss in hotel revenue. Perhaps the biggest challenge, however, lies in the fact that many hotels remain hampered by operational inefficiencies. These inefficiencies are often the result of legacy technology infrastructures and aging property management solutions. These solutions lack advanced features and functionality. Many also lack the ability to centrally connect with other hotel technologies and data sources.

Next-generation hotel property management systems (PMS) render these predecessors obsolete. The best of today's solutions enable hoteliers to operate at unprecedented levels of efficiency and effectiveness. Fully-integrated platform capabilities make it possible to streamline operations across all departments, all properties and virtually all areas of functionality. These range from guest bookings, reservations, and group management to housekeeping, maintenance and front office tasks like assigning guests to rooms, maintaining guest folios, coordinating profile changes, posting room charges and conducting night audits.

Fully-integrated property management platform capabilities make it possible to streamline operations across all departments, all properties and virtually all areas of functionality.



Introduction

With next-generation systems, it becomes possible for the first time ever to seamlessly share data across all parts of the property — or properties, as the case may be — and across all of the various hospitality solutions that are utilized by the hotel on a day-to-day basis. Using PMS interface connections, hoteliers have the ability to centrally manage all crucial functions, from inbound reservation delivery from the central reservations system (CRS), or channel manager, to the revenue management solution to the point of sale (POS) system to the guest response platform to the CRM, marketing, loyalty and guest-facing applications.

The real magic lies in the fact that the PMS connects to the CRS in near real-time to provide accurate, up-to-date data from every transaction and interaction. The data can be made readily accessible to hotel staff across all parts of the organization on an anytime, anywhere basis. The ability to capture, integrate and store all data in a single place — by either physically migrating or virtually connecting it via APIs — is truly a breakthrough development in the annals of hospitality technology. Eliminating disparate data silos makes the system far more holistic — and, also, a whole lot smarter. Connectivity also opens the door to new innovations, such as real-time optimized pricing, which can have a direct material impact on RevPAR while setting the stage for capabilities not yet available or perhaps even imagined.

Another hallmark of a next-generation PMS is automation. Some systems have evolved to the point that virtually all operations now run automatically — and nearly flawlessly, with minimal risk of human error. Hoteliers everywhere, across all property sizes and categories, are reaping the benefits. In fact, 81 percent of hoteliers at small and medium sized properties, and 91 percent of those at large, full-service properties, say that upgrading their PMS capabilities within the past 3 years has enabled them to improve overall performance and financial results by a “significant” or “dramatic” measure. For hoteliers who have not yet migrated to a next-generation solution, this Smart Decision Guide offers a roadmap to success. It includes insights for evaluating different PMS solutions — and, importantly, solution providers — and practical guidance for making the right selection. It also includes pointers for maximizing the value of the investment over time.

All relevant guest data streams flow and combine in the centralized repository, where the data then becomes readily accessible across all parts of the organization.



Chapter 1

Topic Overview and Key Concepts



Chapter 1: Topic Overview

Guests have always expected star treatment, particularly from hotels in upscale categories. Today those expectations are through the roof. This is evidenced by the fact that guests now expect a frictionless experience throughout their stay. For hoteliers, this means, in part, providing an immediate response to guest inquiries. It means ensuring that requests for service — when guests place an order with room service, for example, or book a reservation through the concierge — get immediately fulfilled. At the same time, guests are becoming accustomed to self-service options through mobile apps, voice-activated chatbots and other in-room devices. Hoteliers need to give guests control of services and information — far beyond just being able to check in and check out via their smartphones.

Given these ever-rising guest expectations, coupled with the need to continuously improve operational efficiencies and optimize revenue performance, hoteliers are under more pressure than ever to leverage the right set of enabling technologies to their advantage. First and foremost among these technologies is a hotel property management system designed to automate operations while improving the quality of the guest experience. According to the research conducted for this Smart Decision Guide, nearly one-quarter (23 percent) of hoteliers who have not upgraded their PMS within the past 3 years plan to do so in the next 12 months.

The leading systems on the market today have evolved at lightning speed in recent years. Beyond developments in various areas of technology innovation, including ones related to mobility and personalization, the advances are reflected in the expanded scope of capabilities previously handled either semi-manually or by standalone software programs. Just as the smartphone has evolved to incorporate countless standalone utilities, from the clock, calendar and camera to the video player, voice recorder and music player, to name just a few, the PMS has evolved to incorporate multiple standalone, function-specific software programs and platform capabilities to create an integrated, end-to-end system. There is enormous value in a system in which all component parts centrally connect, with no need to manually import data (or, even worse, re-key information), and which offers a unified view of both hotel operations and guest relationships.

Given ever-rising guest expectations and the need to improve efficiencies, hoteliers are under more pressure than ever to leverage the right set of enabling technologies to their advantage.



Chapter 1: Topic Overview

While all hoteliers are bound to benefit from some of the latest developments — mobility, for example — other features and functionality of a next-generation PMS are going to be of greater value to some hoteliers than to others. After all, different hotels have differing technology requirements. A full-service hotel will likely require a far more robust, sophisticated and comprehensive system than a small, limited-service or budget hotel, which may need only to streamline basic functions like guest bookings, housekeeping, guest charges and maintenance management. A full-service hotel will likely have complex reservation, group scheduling and inventory requirements. It may also need to manage concierge and function space operations as well as golf, spa and other facilities, with a host of guest-facing features essential to facilitating exceptional guest service. A small, limited-service hotel may have none of these requirements. It may need nothing more than bare-bones platform for managing front office, bookings and reservations functions, from assigning guests to rooms and maintaining guest folios to coordinating profile changes, posting room charges and maintaining housekeeping status.

In all cases, the PMS needs to support all hotel functions, no matter how extensive or limited these may be. This can be done either through built-in capabilities or by allowing seamless integration with add-on modules and/or third-party software solutions. Given the ability to add any combination of modules, with minimal integration hassle, hoteliers can readily create a property- or chain-wide system. Many systems readily integrate with guest response programs, accounting software, keycard and access control systems, self-service kiosks, internet and telephone systems, in-room refreshment (minibar) and entertainment applications — and even, in some cases, dry cleaning and transportation shuttles. Increasingly, hoteliers are testing the waters with AI-enabled smart devices, including voice-activated chatbots. Some major brands are dipping their toes into Internet of Things (IoT) “connected room” technologies that include sensor-activated thermostats, digital room keys, and in-room streaming/casting services. Hoteliers are acutely aware of the need for technology connectivity, data integration and interoperability, even if they haven’t yet transitioned to a next-generation PMS.

The PMS needs to support all functions and operational requirements, no matter how extensive or limited these may be, either through built-in capabilities or by allowing seamless integration.



Chapter 1: Topic Overview

The positive impact of a next-generation PMS on hotel operations, guest satisfaction and employee satisfaction should be apparent right out of the gate. Streamlining operations across the organization and providing better management controls should lead to increased staff efficiency, with less time spent attending to mundane activities like data entry and reconciliation. This efficiency should translate into a reduction in operational costs, including lower IT maintenance overhead. Enhancing guest relationship management capabilities should improve guest satisfaction, loyalty and retention. These improvements should reflect in guest satisfaction surveys, with progressive improvements in Net Promoter Score® (NPS), or similar rating system, as well as the all-important guest reviews in social media, leading to more repeat guest stays — and, ultimately, increased RevPAR and profitability. Better data integration and accuracy should improve revenue management. The ability to automatically synchronize inventory and rates across all sales channels should also improve revenue results. Robust data analysis and diagnostic tools for identifying emerging market trends, analyzing guest behaviors, etc., should generate actionable insights that drive further improvements in financial performance.



- Increase revenue
- Increase profitability
- Reduce operating costs
- Reduce IT costs



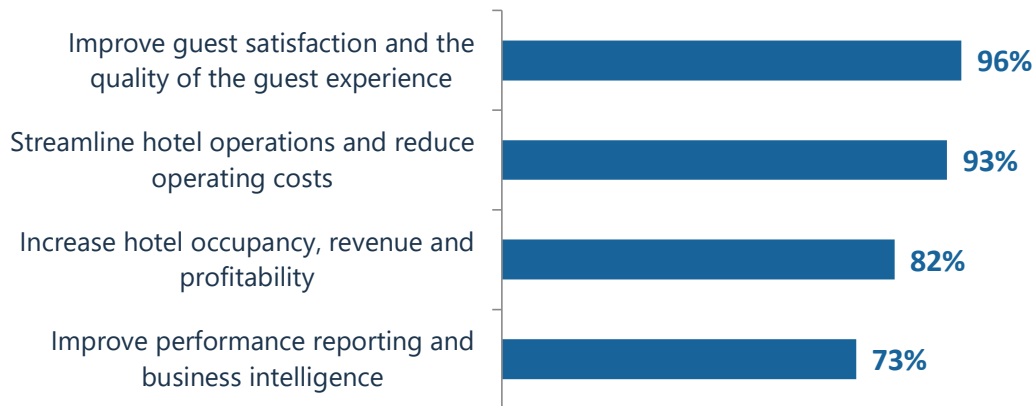
- Improve guest inquiry response time
- Centralize and streamline hotel operations
- Improve staff efficiencies
- Improve guest services fulfillment time



- Enable seamless integration with third-party modules
- Improve data access and accuracy
- Reduced stress on hotel technology infrastructure
- Improve business performance analysis
- Improve guest satisfaction, loyalty and retention
- Increase brand advocacy

Research Data Point

What are the biggest benefits one can expect to gain with the right property management system?



Research findings are derived from the Q3 2018 survey on Hotel Property Management Systems.



Chapter 1: Key Concepts

Most seasoned hoteliers are already well-versed in the demographic and technological changes taking place in their industry. The following descriptions merely serve as a reminder of a few key concepts for hoteliers to keep in mind as they look to achieve some of the benefits of a next-generation PMS.

Cloud deployment. The allure of the cloud is undeniable. Today most leading hospitality solution providers either deploy their solutions in the cloud only or offer a hybrid model with both an on-premise and cloud-based component. Oft-cited benefits of the cloud include elimination of on-site server hardware (and the day-to-day maintenance that goes along with it) as well as capital expenses in the form of upfront hardware purchases as well as software licenses (cloud-based software is typically made available on a subscription basis). A cloud solution usually allows for nimble technology stacks. If part of the integrated system becomes obsolete or fails, for whatever reason, new software can be readily plugged in to replace it, minimizing down time. The real beauty of the cloud is that the software is always available and up to date. There are no long downtimes for software upgrades. The upgrade process tends to be hassle-free. Maintenance windows are usually short or nonexistent. With single-version development, all hotel customers are upgraded simultaneously. This puts the onus on the solution provider to ensure the software is delivered with unfaltering quality. New features designed to meet current business challenges, improve revenue performance and enhance the quality of the guest experience tend to be rolled out on an ongoing basis. The fact that a cloud PMS can be accessed through any device with an internet connection also ranks as one of the most compelling benefits. Other benefits include reduced stress on hotel technology infrastructure and more seamless integration with third-party applications and modules. Cloud solutions tend to be well-equipped to adapt and grow based on future requirements. In an industry that is constantly evolving and changing, the need for such flexibility cannot be overstated. A cloud deployment model automatically adds capacity with scalable hardware. Expansion efforts can be executed in a fraction of the time than would have been required in the past.

New features designed to meet current business challenges, improve revenue performance and enhance the quality of the guest experience tend to be rolled out on an ongoing basis.



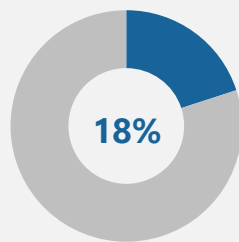
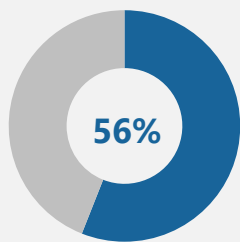
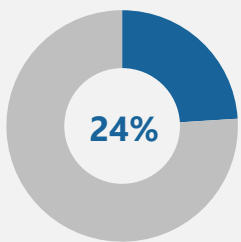
Chapter 1: Key Concepts

Guest Experience Management. A hotel needs to lavish its guests with personalized attention and pamper them with relevant services. This is particularly true of upscale properties that compete in large part on the quality of guest services. Today, hoteliers are becoming increasingly focused on data-driven personalization strategies. They are seeking ways to enhance the quality of the guest experience by understanding guests' wants, needs, situations and preferences at a granular level and then acting upon that understanding to deliver superior, tailored services. Does a guest require a hypoallergenic comforter? Is a guest sensitive to noise? What refreshments and activities do they like? The answers to these and countless other questions reside in the guest data. With a next-generation PMS, hotels can capture, integrate and store all data in a single, consolidated repository. To improve the guest experience, hoteliers are also beginning to embrace AI-enabled devices. Already, in many hotels, AI is improving guest service inquiry response and fulfillment time while decreasing problem resolution time. Going forward, AI will enhance the in-room experience, by seamlessly integrating technology-enabled amenities. Utilizing individual guest data captured during previous hotel stays, AI will automatically set up a guest room with a level of precision that would elude human efforts. Devices will update the room with personalized music, temperature and lighting settings, anticipate the need for room service or specific information requests and predict which hotel or outside services and activities would likely be of interest to guests on an individual basis.

Research Data Point

"To what extent has upgrading your hotel property management system (within the past 3 years) enabled your business to improve overall performance and financial results?"

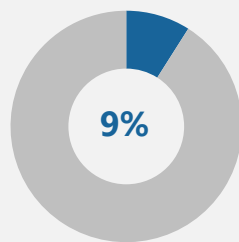
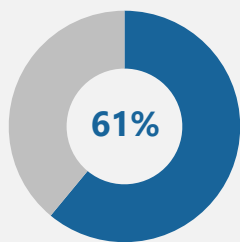
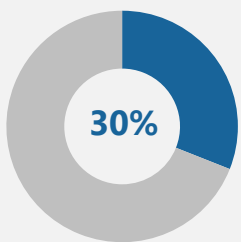
Dramatic improvement Significant improvement Only minor improvement



Small, midsize and limited service hotels

81% of respondents cite "significant" or "dramatic" improvement

Only 2% cite no improvement



Large and full service hotels and resorts

91% of respondents cite "significant" or "dramatic" improvement

0% cite no improvement

Research findings are derived from the Q3 2018 survey on Hotel Property Management Systems.



Chapter 1: Key Concepts

Personalization. Closely related to guest experience management is the notion of personalization. The future success of many hotels and resorts, at least those operating in certain categories where service quality ranks as a key point of competitive differentiation, will rest squarely on how well they can gain a deep understanding of their guests on an individual basis. Importantly, success also rests on how well they can act upon that understanding to improve the overall quality of the guest experience. In fact, 89 percent of hoteliers “agree” or “strongly agree” that targeted personalization – i.e., presenting guests with highly relevant messages, offers and services at the right time – is one of the most effective ways to improve the guest experience and, ultimately, guest satisfaction, loyalty and favorable brand advocacy. Guest personalization is about data. It is a function of capturing and leveraging a vast ocean of guest profile information. Ideally, this information should include hundreds or thousands of data points gleaned about a guest’s activities, from hotel booking to hotel checkout and everything in between. All of the booking data, geo-demographic data, transaction data and behavioral data should reside in a centralized data repository, which should also include the complete folio history of charges incurred and payments made by an individual guest during a stay, or over any specified period of time, across all of the hotel group’s properties. A single consolidated view of each guest profile record, both at the property and multi-property level, is essential. Every detail, from the food and drinks a guest orders to their usage of various hotel services and in-room amenities to every interaction, transaction and documented experience that takes place between the guest and the hotel property, updated on a continuous basis, can help paint a more robust, comprehensive portrait of the guest and can better inform how a hotel can serve them best. In short, access to large volumes of guest data, integrated from multiple sources, is needed to build the foundation for guest personalization. With that foundation in place, and given the right technology capabilities, a hotel can understand a guest’s personal preferences, interests and behaviors at a granular level. It can facilitate relevant interactions and recommendations and take any number of other types of actions based on a guest’s stated and inferred preferences, interests and behaviors, that are designed to make the guest feel special and appreciated.

The future success of many hotels and resorts will rest squarely on how well they can gain a deep understanding of their guests on an individual basis to improve their experience.



Chapter 1: Key Concepts

Data integration and technology interoperability. For most hoteliers, data integration and technology interoperability are among the primary driving forces in their decision to upgrade to a next-generation hotel solution. In fact, 91 percent of hoteliers “agree” or “strongly agree” that technology platform interoperability is a key success factor for hotel performance improvement. A fully-integrated PMS gives hoteliers a distinct and formidable advantage over competitors who may lack the same level of technology connectivity and data integration. Incidentally, and importantly, this includes OTAs, which have no visibility into guest transaction activity or behavior inside a hotel property. An OTA cannot glean insights into which spa treatments a guest prefers or how much money that same guest spends in the restaurants. Only a hotel has the ability to capture interaction and transaction data at every touch point and create a unified view of guest behavior. Fragmented solutions and data silos are the enemy of hoteliers who strive to streamline operations and deliver a positive guest experience. Data integration starts with the central reservations system (CRS). If any portion of the business is coming through a CRS, as is generally the case, then ensuring seamless integration between the CRS and the PMS should be top priority in order to support reservation delivery, modification, and cancellation, as well as new and modified prices, stay controls, and inventory synchronization. Similarly, if the hotel offers a restaurant or café, then those transactions need to be recorded in the PMS. Poor point of sale (POS) integration can result in financial losses related to errors in manual updates and mistakes in POS consolidations at the front desk. It also prohibits the hotel from knowing how much money a guest spends with the property, which can be an important consideration when it comes to future incentives. Failure to integrate hotel functions can also impair the guest experience. The ability to reschedule and reprioritize housekeeping tasks through a centralized platform in order to accommodate the needs of a waiting guest, versus a guest who has not yet arrived at the hotel, is a good example. Guest loyalty applications, sales and catering systems, energy management and electronic locks and in-room movie rental solutions all need to connect and interface and seamlessly share data.

A fully-integrated PMS gives hoteliers a distinct and formidable advantage over competitors, including OTAs, who may lack the same level of data and technology connectivity.



Chapter 1: Key Concepts

Rate distribution management. When it comes to OTAs, the “ignore them and they’ll go away” approach didn’t pan out. While some of the larger hotel groups are investing heavily to try to limit the influence of the leading OTAs and drive more direct booking revenues through their own websites and distribution channels, the reality of the situation is that OTAs rule the world of hotel booking. As a result, most hoteliers today have little choice but to embrace the OTAs as a necessary marketing and distribution partner. That means listing their guest room inventory and rates on as many of the OTAs as possible in order to maximize success in securing guest bookings. That, in turn, means having technology capabilities in place that enable seamless distribution management. Needless to say, hoteliers simply do not have the time and resources to manage multiple online channels manually any more than they have the time and resources to manage rates manually. In a dynamic market characterized by continuous fluctuations in inventory and prices, and with myriad channels through which travelers can book inventory, automatic rate distribution is imperative. Fortunately, automatic rate distribution is a feature that comes fully integrated in a best-of-breed PMS. The feature allows hoteliers to focus their efforts on broadening their marketing and distribution reach without having to make any updates manually. In a nutshell, the technology works by linking the property management system, the central reservations system and the revenue management system into the OTAs and any other chosen marketing and booking channels the hotel uses to “get found” by potential guests searching for hotel accommodations. With this capability seamlessly integrated into the platform, information is instantly exchanged over a two-way connection between the hotel and the various online channels. Real-time rates, room availability and restrictions are automatically sent from the PMS to the online marketing and distribution channels, including the OTAs. And when a guest room is booked via one of the third-party websites, the hotel’s PMS is automatically updated in real time to reflect the change in availability. Automatic rate distribution enables hoteliers to maximize room inventory while optimizing revenue without running the risk of overbooking, which needs to be avoided at all costs.

Real-time rates, room availability and restrictions are automatically sent from the PMS to the online marketing and distribution channels, including the OTAs.



Chapter 1: Key Concepts

Revenue management. Tied to the fact that hoteliers operate in a dynamic market characterized by continuous fluctuations in demand for guest rooms is the fact that there are continuous variations in how much travelers are willing to pay for those rooms at any given point in time. Sometimes an upsurge in demand can be anticipated in advance — e.g., knowing that a sports tournament, concert performance or other major event is coming to the area on a specific date, for example. In most cases, hoteliers need to rely on historic and real-time data. A next-generation PMS captures and houses data related to everything from occupancy rates, ADR and booking pace to lengths of stay, booking channels and guest segments. This vast data repository provides the basis for identifying patterns and predicting future demand in guest room occupancy. PMS rate management features, including seasonal pricing, day-of-week pricing, time-of-day pricing, premium and discount rates and packages, and daily override functionality, enable hoteliers to respond immediately to both predicted and unpredicted fluctuations in guest demand. Advanced revenue management solutions are able to process increasingly large volumes of data, faster than ever before. Platform capabilities vary widely and come in a lot of different flavors in terms of how revenue management is handled. One flavor centers on a Best Available Rate (BAR) pricing strategy, which is a tiered rate structure widely used by hoteliers to manage rates within high and low rate seasons. BAR provides more flexibility over the traditional method of changing rack rates by date for each room type with additional follow-up required to make changes to other marketing programs. Other flavors automate pricing recommendations using more sophisticated and dynamic approaches to optimize RevPAR. Importantly, revenue management is no longer ever just about “heads in beds.” Nor, for that matter, is it just about rooms. Revenue streams such as conference hosting, recreational facilities, restaurants and spas — which, taken together, typically account for one-quarter or more of a full-service hotel’s revenues — all factor into the equation. Hoteliers invariably fall short of achieving their revenue potential, even if a property reaches full occupancy, when they lack the ability to maximize RevPAR with a built-in revenue management solution or through seamless integration with a third-party solution that automates pricing decisions.

Hoteliers fall short of achieving their revenue potential, even if a property reaches full occupancy, when they lack the ability to maximize RevPAR through revenue management.



Chapter 2

Buying Considerations and Evaluation Checklist



Chapter 2: Buying Considerations

When it comes to the potentially arduous task of researching and evaluating a next-generation property management system, it can be hard for hoteliers to know where to even start. After all, there are dozens of solid options on the market today. Many of these solutions boast of leading the charge on technology innovation and many appear to offer a vast array of cutting-edge features and functionality. Nearly all the solutions offer platform delivery in the cloud, providing for greater flexibility and information access than ever before as well as the ability to scale as needed, not to mention all the cost savings and other benefits outlined in previous chapters. Today most PMS interfaces are easy to use and easy to learn. In many instances, employees can be trained on a new system in as little as a few shifts. This is a big benefit, especially at properties with high employee turnover rates. User interfaces tend to be highly intuitive across the board, with screens laid out in logical and easy-to-understand formats. Quick-feature icons are commonly used to help reduce the learning curve and speed workflow. Also, nearly all solutions today are mobile-enabled, allowing for anywhere, anytime access via any device. What's more, many systems are backed by reputable technology solution providers with impressive customer rosters and a long track record of success.

This isn't to say that systems are becoming identical and there is no right or wrong choice for a given hotel. On the contrary, different solutions have different capabilities and competitive strengths, provide different user experiences, and may deliver different benefits with different financial outcomes. For starters, hoteliers should consider the extent to which the PMS would likely streamline and automate overall hotel operations, from facilitating housekeeping assignment and statusing to handling group room block allocations. Beyond that, the key considerations will largely depend on factors that include the hotel's competitive environment and strategic priorities. Hoteliers with independent properties may be concerned with direct website booking features, given their need to actively market their properties and control booking costs. They may want to delve into the integrated booking engine and online marketing capabilities. Some hoteliers may have certain revenue management practices they want the PMS to support natively. They may want to ensure the system can automatically apply rate and inventory controls based on manually-entered "day type" indicators of anticipated demand, for example.

Different property management systems have different capabilities and competitive strengths, provide different user experiences, and may deliver different benefits.



Chapter 2: Buying Considerations

There are many factors to consider during the research and evaluation process, some of which invariably carry more weight than others, depending on the buyer. The following are a few of the more general buying considerations for hoteliers across all sizes and categories to keep in mind with a next-generation PMS.

Technology integration capabilities. There are significant cost benefits associated with a hotel property management system that enables "centralized shopping" of data through seamless interaction between the CRS and PMS and all other hotel solutions and modules. These benefits include reduction in losses related to errors in manual updates and delayed or lost room charge postings as well as lower integration costs with third-party hardware and software. Hoteliers waste less time and money when they are able to directly access a single source for bookings, for example, with no need to sync data. Integration reduces potential data disparity issues around "last room availability," oversold rooms, etc., which can be costly in the long run. Data integration also needs to extend to POS systems used at the hotel's restaurants, cafés and gift shops as well as to any solutions for managing the hotel's spa, golf course and other facilities. Transaction and interaction data from all sources, from retail to maintenance, housekeeping, concierge and other guest requests, need to become part of the common data flow. Other technologies that need to seamlessly integrate with the PMS may range from door lock and encoding systems for assigning room keys to telephony and call center management software. Ideally, a next-generation PMS should also integrate with guest loyalty management and rewards applications and the CRM solution, which enables marketing and sales teams to better target their campaigns.

Next-generation solutions come with robust data analysis tools for performing year-over-year evaluations, identifying emerging market trends, and analyzing guest behaviors.

Reporting and analytics capabilities. In the past, answering even basic performance questions often required time-consuming research and manual calculations. By contrast, next-generation solutions come with robust data analysis and diagnostic tools for performing year-over-year evaluations, identifying emerging market trends, and analyzing guest behaviors. Every hotel is sitting on a mountain of data related to guests, rooms, facilities, employees and various operational and financial aspects of the business. The tools for analyzing this data are increasingly flexible, sophisticated and powerful and can answer any number of



Chapter 2: Buying Considerations

questions that are key to performance improvement. “What does our revenue forecast look like and how can we improve it?” “How are our guests finding our property? What channels are they using to book reservations? Where are groups coming from?” “What margins are we getting on each channel?” “How well are we managing our labor costs?” “How well are we managing our reservation distribution channel inventory and pricing strategies?” “How can we capture more ancillary revenues?” While most systems come equipped with dozens of standard reports that should meet most hoteliers’ day-to-day performance management requirements, some hoteliers may have additional requirements such as analytical dashboards that can be used to generate custom reports and new insights.

Mobile access capabilities. Mobility cannot be an afterthought when it comes to hospitality technology. A mobile-first design is imperative. All staff-facing interfaces need to allow for anywhere, anytime access. Providing staff members with real-time access to information via mobile devices can reduce guest wait times at the front desk during check-in, which is an important factor in overall guest satisfaction. Mobility can also mitigate other inconveniences that could impinge on the quality of the guest experience, including potential housekeeping and maintenance delays. For most hoteliers, being able to manage virtually all hotel operations from any place, at any time, via any device is a true game-changer. Accomplishing basic tasks like adjusting rates or arranging housekeeping schedules while on the go can make a big difference. Hoteliers can track staff productivity and monitor operational performance from any distance to the physical property. Guest-facing mobile apps and devices also need to interface with the PMS to provide services connectivity and up-to-date information access.

Channel management capabilities. Rates and inventory information need to propagate accurately across all channels and touchpoints, including OTAs. Otherwise, the prices that are presented to travelers on some channels may be lower than desired or rooms presented on some channels as available may, in reality, be unavailable, and the property may be overbooked. Inputting room rate and availability changes manually can result in errors that damage the brand’s reputation and at times can lead to revenue loss.

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Chapter 2: Buying Considerations

Specialized modules. A golf pro shop management module, which typically includes such features as tee time scheduling, profile/ billing and tournament management, allows a hotel to set up and maintain complete guest profiles and histories as they relate to golf activities, including financials, handicaps and records of purchases. A spa management module tracks guest histories, medical conditions, transaction logs and preferences. Advanced housekeeping modules can assign cleaning services based on available staff and amount of work to calculate the most effective way to assign staff. Concierge modules should integrate with the PMS and include such features as request tracking, local vendor databases and inventory management tools for processing guest packages. Specialized modules for valet, maintenance and other departments may also be important. Ensuring that the system has specialized modules built in or can accommodate add-on applications that manage specific hotel facilities may rank an important consideration for many buyers.

Group sales capabilities. Hoteliers with function space inventory require integrated solutions designed to facilitate fast and efficient execution of complex event and banquet space bookings. Group sales managers need to be able to quickly view available inventory, price it and, if appropriate, block it. Those hoteliers with multi-property operations need a solution that enables them to centrally manage function space inventory across all locations. Advanced sales and catering functionality, which a growing number of property management solutions now offer as a core feature, maintains a tabulation of all function spaces within and across properties, manages combinations of function spaces, allows for overbooking, interacts seamlessly with event sales, and records and manages the booking of group guest rooms. The best of these integrated applications combine the sales and catering function with the guest data repository. This allows managers and staff to access information about all groups across all properties as well as individual guest spend on activities and reservations. They can track expected event revenue, margins and final consumption based on customizable revenue types, leading to continuous performance improvement in group sales activities.

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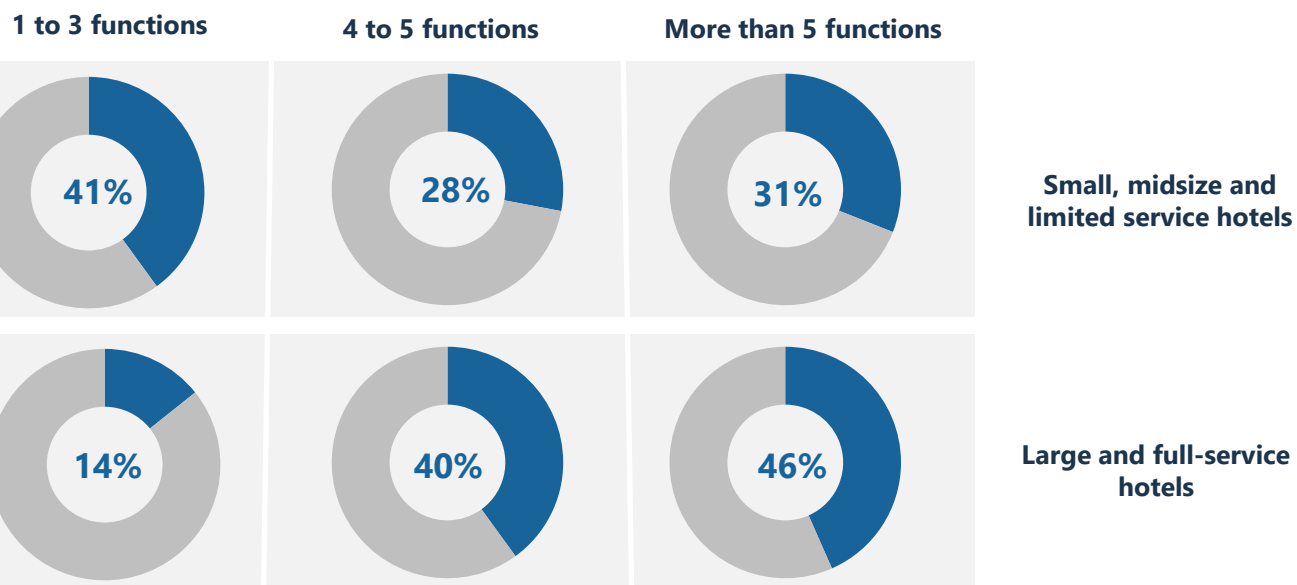
Chapter 2: Buying Considerations

Customization capabilities. Every property has a unique personality. A one-size-fits-all approach to technology implementation is rarely a recipe for success. The PMS should allow for a certain degree of customization — including, for example, the ability to modify screen layouts or the way that printed folios and registration cards appear. Any solution under consideration should be sufficiently flexible and customizable to meet the needs of the property. These needs may include geographic and regional considerations, including multi-language screens and fiscalization and localization capabilities.

Setup, support, training and maintenance. Hoteliers should expect the same high standards of service excellence from a solution provider that a guest would expect from the hotel itself. That means knowing you can count on a solution provider for help with everything from technology implementation, including data migration and customization, to addressing day-to-day issues as they arise. That extends to employee onboarding, ensuring that managers, front desk agents and other hotel staff get the training they need to master the new system quickly and effectively. Effective e-learning tools and other training resources can shorten the learning curve in ways that translate into substantial cost savings. Also important is the software upgrade process, which should be hassle- and worry-free. To ensure that this is the case, hoteliers should get a clear sense from solution providers for how upgrades are handled, how frequently upgrades take place, and whether there is likely to be any service interruptions.

Research Data Point

“Approximately how many functions or departments across your lodging property are currently being administered using a hotel property management system?”



Research findings are derived from the Q3 2018 survey on Hotel Property Management Systems.

Chapter 2: Evaluation Checklist

Regardless of the size, location or category of their property or properties, hoteliers need the right technology foundation, starting with the PMS, to streamline operations, optimize revenue performance and offer flawless guest services — or at least achieve some semblance of those lofty goals against an ever-changing landscape. This Evaluation Checklist offers a framework for conducting an apples-to-apples comparison of property management systems using the buying considerations outlined previously. Other key considerations can be added based on individual buyer priorities. Relative weightings can be assigned on a scale of 1 (“This buying consideration has no bearing on our purchase decision”) to 10 (“This buying consideration is a very important factor in our purchase decision”).

Buying Consideration	Weighting	Vendor 1	Vendor 2	Vendor 3
1. Features and functionality				
a. Reservations / online bookings				
b. Registration and guest accounting				
c. Point of sale				
d. Guest Relationship Management				
e. Group sales / multi-property management				
f. Geographic / regional adaptability				
g. Marketing and sales enablement				
h. Data analysis and performance reporting				
i. Modules (golf, spa, housekeeping, etc.)				
j. Channel and revenue management				
k. Other feature(s) _____				
2. Technology interoperability/data integration				
3. Cloud hosting and mobile access				
4. Ease of use				
5. Flexibility / customization				
6. Training / support / reputation				
7. Expected costs and ROI				
Overall Rankings	N/A			

Chapter 3

Must-Ask Questions



Chapter 3: Must-Ask Questions

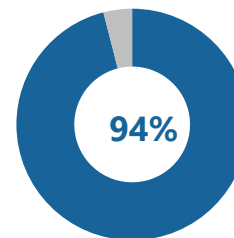
Hoteliers will sleep well knowing they made the right decisions about their technology solutions. But how can they know their decisions are the right ones? By asking the right questions of solution providers, they can better determine which PMS on the market today best fits their needs and is most likely to deliver the benefits they seek. Many of these questions are bound to vary from one hotelier to another depending on the specific needs and strategic requirements of the hotel as well as the different firmographic details of the property or properties, as the case may be. These details include category, size, typology, guest composition and multiple other physical attributes.

Does the new PMS need to interface with self-service check-in kiosks? Does it need to handle corporate expense account management? Does it require a casino comp module and need to integrate to a player tracking system, or require gaming commission recognition? Does it require its own activity booking system or need to integrate with spa and dining reservation systems? If a hotel has a high contribution from government and NGO business, how well does the system handle tax-exempt reservations? If group is a significant portion of the hotel's mix, are the group block allocation and contracting capabilities up to the task, and any required sales and catering integration in place?

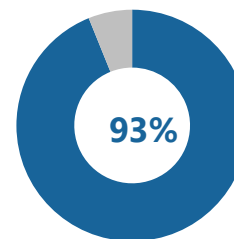
Large, complex hotels will likely require a PMS that can integrate numerous applications across multiple outlets. Hotel chains need a platform that allows them to share data from property to property for inventory management and performance analysis. Hoteliers should gain a clear understanding of their own requirements and weigh them accordingly (see the Evaluation Checklist in Chapter 2).

Research Data Point

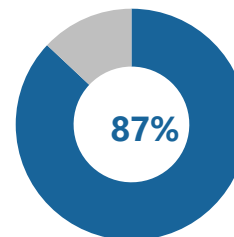
Percentages of hoteliers who view each of the following success factors as "important" or "very important."



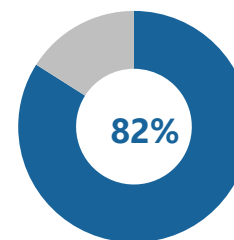
Use guest profile information to improve the overall guest experience and increase retention through loyalty and rewards programs



Integrate with different technologies to create a "command and control center" (with a 360-degree view of operations across the organization)



Generate analytical reports to reveal actionable insights that can help drive performance improvement



Drive increased efficiency and cost reduction across multiple hotel departments, operations and functions

Research findings are derived from the Q3 2018 survey on Hotel Property Management Systems.

Chapter 3: Must-Ask Questions

The following are just a few of the questions that hoteliers may wish to explore with solution providers during the research and evaluation process to ensure that, once implemented, the PMS will enable them to achieve their desired business outcomes — and, also, so they can sleep well knowing they made the right decisions.

Does the solution meet their data analysis and intelligence needs? With 87 percent of hoteliers ranking the need to gain access to PMS data and business intelligence as “important” or “very important,” it stands to reason that they would want to ensure that any PMS under consideration is able to meet expectations in terms of data analysis and performance reporting. Never before have hoteliers had such visibility into all facets of their operations, including their guest relationships. Today, according to the research, 94 percent of hoteliers view the ability to use guest profile data to improve the guest experience. That being the case, it only stands to reason that the must-ask questions of solution providers should include ones that help hoteliers understand the extent to which any PMS under consideration will enable them to better serve the needs of their guests. Does the solution use automated match-and-merge features to combine guest information, reducing inaccurate guest records and improving overall data quality? Will it enable them to manage guest profiles with greater efficiency and accuracy? Will it enable them to store and manage a single instance of a unique guest profile across all parts of the enterprise, regardless of where a guest may have stayed in the past, at what property or properties? Will it provide a real-time view of a guest’s past purchase behavior, their demonstrated preferences and any number of other details that may be pertinent in informing what specific offers, messages and treatments may resonate most effectively with — and be appreciated by — that individual guest? Most systems come equipped with a large number — in some cases, dozens — of standard dashboards and reports that should meet most hoteliers’ day-to-day performance management requirements. That said, not all data queries can be anticipated in advance. *Tip: Find out to what kind of customized reporting can be performed on an ad hoc basis — and, also, what is involved in the process of filtering and sorting data according to a specified set of parameters in order to generate the desired information and insights.*

Find out to what kind of customized reporting can be performed on an ad hoc basis — and, also, what is involved in the process of filtering and sorting data according to a specified set of parameters.



Chapter 3: Must-Ask Questions

What is the solution provider's track record of success? Reputation and customer satisfaction are always important factors in a technology decision-making process. Nobody wants to purchase and implement a revenue management solution that falls short of expectations due to known shortcomings in stability, reliability or promised benefits. No input may be more important to the buying decision than that which can be gleaned from existing hotel customers, particularly properties with commonalities in terms of category, size, typography and existing technology infrastructure. A solution provider or consultant may be willing to provide one or more client references. And some clients, particularly those operating in noncompetitive markets, may be willing to share their experiences and perhaps even disclose results in terms of percentage increases in RevPAR. Client testimonials and success stories can also be valuable sources of information. *Tip: Find out what performance issues may arise by talking to existing clients, preferable ones that are similar in size and existing technology infrastructure. Ask about the product roadmap to understand the plan for future features and functionality and ask about the provider's track record of delivering against that roadmap and deadlines.*

How easily does the PMS integrate with third-party technologies? To compete efficiently and effectively in today's environment, hoteliers need to utilize next-generation technology capabilities and also get their data houses in order. The problem is that relevant data typically resides in many different silos. In the pursuit of advancing their technology capabilities, hotels have tended to proliferate standalone platforms, function-specific modules and guest-facing apps. *Remember: Seamless technology integration is key to optimizing hotel operations and improving the guest experience. If a significant portion of business comes through a central reservations system, seamless integration is required to support reservation delivery, modification, and cancellation, as well as new and modified prices, stay controls, and inventory synchronization. Similarly, poor POS integration can result in financial losses related to errors in manual updates and mistakes in POS consolidations at the front desk. Tip: Ask about PMS compatibility and interoperability with third-party technologies in place or anticipated. The PMS should interface to Internet Distribution Systems (IDS) through Hotel Technology Next Generation (HTNG) standards.*

No input may be more important to the buying decision than that which can be gleaned from existing customers, particularly properties with commonalities in terms of size and category.

Chapter 3: Must-Ask Questions

How long will it take for problems to be resolved? PMS buyers should have clear expectations around customer support and problem resolution as well as the training that may be needed to get front desk employees and other staff up to speed on the new system. More than three-quarters (79 percent) of hoteliers agree that user training ranks as a key success factor in ensuring that a PMS is utilized as effectively as possible. Does the solution provider (or a certified subcontractor) offer adequate training? Does it offer online troubleshooting and diagnosis should technical issues arise? Is local in-person service and support a possibility? *Tip: Make sure that problems will get resolved in a timely manner. Some solution providers will go so far as to guarantee response and case resolution times.*

What is the total cost of ownership? Are there “hidden” costs? Next-generation hospitality solutions tend to be less expensive and require less up-front investment on the whole than their predecessors. There are many reasons for the shift to increased affordability, including the fact that installation is generally less complex and hardware less expensive compared to, say, a decade ago. With many systems, the data is stored in the cloud, eliminating the need for on-premise servers. Most cloud-based systems also use a subscription pay-as-you-go model, which generally means no long-term contracts and no upfront capital investment for the software or hardware. This may be an important consideration for smaller hotels with a limited budget. Cloud solutions are generally built to scale as the volume of business increases, so the costs are always in coordination with the size of the hotel’s operations. In all cases, it is important to confirm which software features and modules, including future upgrades — as well as which hardware components, if any — are included in the base (recurring) price so as to avoid any surprises down the road. Also, it’s important to factor both the direct and indirect costs into the equation. While the direct costs refer to the purchase price of the both the hardware and software, which, again, is likely to consist of a monthly charge for cloud-based systems, the indirect costs may include software customization, staff training and data backup. *Tip: Ascertain that all associated installation, licensing, maintenance and ongoing service and support fees are included in the pricing.*

More than three-quarters of hotel operators agree that user training ranks as a key success factor in ensuring that a revenue management solution is utilized as effectively as possible.

Chapter 3: Must-Ask Questions

What return on investment (ROI) can be expected? Making the business case for upgrading PMS capabilities means projecting the likely return on investment. In terms of ROI, the first question hoteliers should ask is: To what extent will the new system reduce the amount of time currently being spent on managing front desk activities, including check-ins and checkouts, and on such repetitive and time-consuming tasks as consolidating guest accounts and managing rates and availability across distribution channels, including OTA, GDS, web, and travel agents, that can now be handled in an automated manner? To what extent is the new system likely to improve sales and revenue performance — for example, by increasing bookings via web booking engine integration, increasing occupancy rates through real-time inventory updates, and increasing average daily rates through integrated revenue management and advanced forecasting tools as well as through improved data analysis capabilities that may reveal new insights and opportunities? Another key factor to consider pertains to reduced IT maintenance costs as well as reduction in billing losses, including losses related to errors in manual updates and delayed or lost room charge postings (guest purchases made across other parts of the property), as well as lower integration costs with third-party hardware and software. *Tip: Keep in mind that enhancing the quality of the overall guest experience through the deployment of a next-generation PMS should lead to a greater number of repeat guest stays and a higher volume and intensity of positive brand advocacy.*

To what extent will the new system reduce the amount of time currently being spent on managing front desk activities, including check-ins and checkouts, and other mundane tasks?

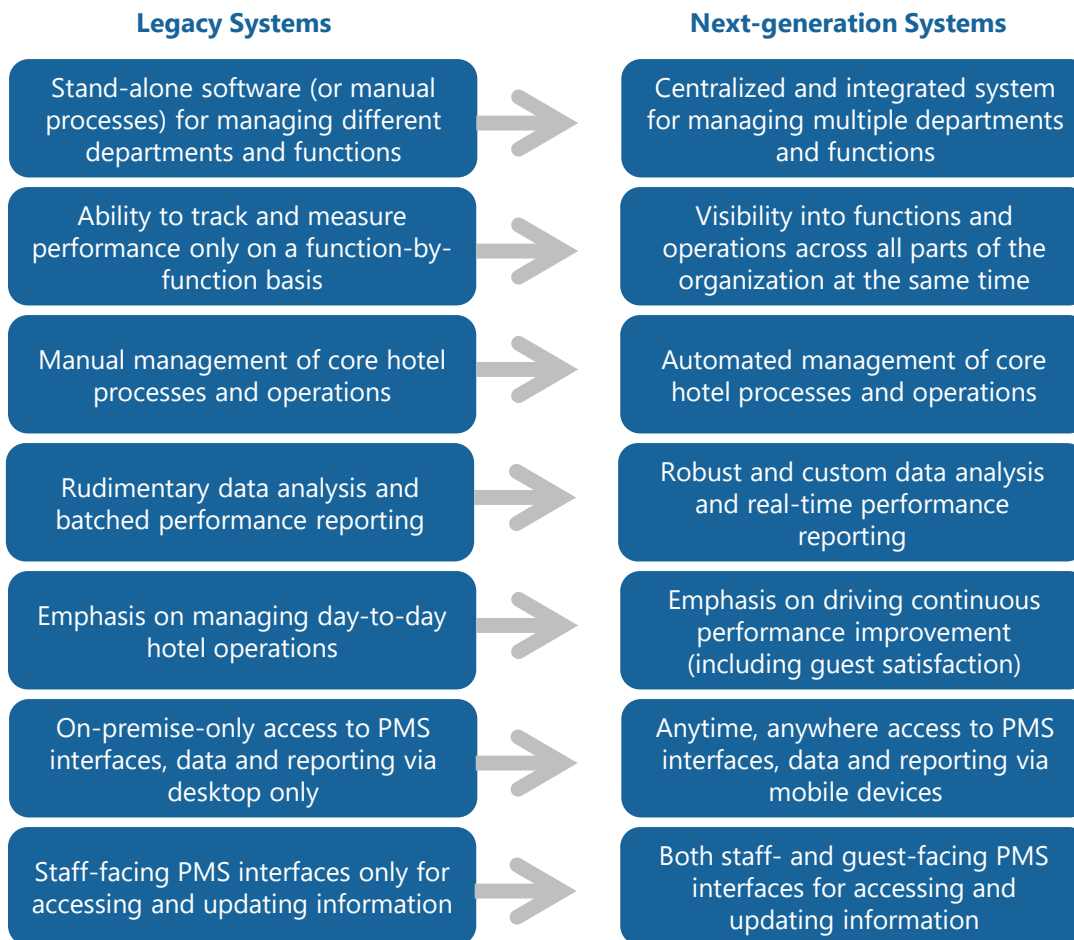
Chapter 4

Roadmap and Recommendations



Chapter 4: Roadmap

From standalone software components to a centralized and integrated system that encompasses all hotel functions. From manual management of core hotel operations to automated management of core hotel operations. From rudimentary data analysis to robust analysis that yields actionable insights and provides a real-time view of hotel performance. The Roadmap Diagram below offers a migration path for hoteliers to keep in mind along the journey toward a next-generation PMS. In many cases, of course, buyers will already have a system in place and the goal will be to upgrade, expand and improve their current capabilities. Keep in mind that putting the right technologies and data foundation in place is only half the battle won. Having the right business processes, organizational resources and performance metrics in place also rank as critical success factors.



Chapter 4: Recommendations

Following are just a few recommendations to help steer PMS buyers in the right direction during the evaluation phase.

Focus on technology integration. Transaction and interaction data from all sources, channels and point solutions need to become part of the common data flow, with the PMS serving as the centralized data repository. Integration provides the main impetus for phasing out standalone software programs unable to “talk” with one another. In their place, hoteliers are implementing technologies that makes it easy for a hotel to integrate new data streams and interoperate with both existing and new solutions. These new technologies include the various self-service guest-facing apps that are gaining in popularity, allowing guests to manage hotel processes and access hotel information on their own, and even the voice-activated digital assistants that are coming into vogue. Data integration also extends to third-party revenue management systems, which can further optimize pricing decisions, guest loyalty management and rewards applications and the CRM component, which enables marketing and sales teams to better target their campaigns. The CRM helps ensure that the messages and offers that a hotel presents to guests across various channels are relevant and therefore more likely to elicit a favorable response.

Ensure automation of room and rate changes. Hotels need to customize the direct booking engine within the CRS, or channel manager with revenue decisions and to automate channel-specific offers via the call center and other channels. The CRS should integrate with OTAs specific to the market in which the hotel operates. Built-in mapping capabilities should make it possible to organize OTAs, which today serve as both booking engines and online shopping channels. Channel management integration ensures that room rates and inventory availability update quickly and accurately across all booking channels. Otherwise, prices presented on some channels may be lower than desired. Similarly, rooms presented as available may, in reality, be unavailable, in which case the property risks becoming overbooked. Manually inputting room and rate changes can result in errors that, ultimately, can damage the brand’s reputation and result in revenue loss.

Data integration also extends to third-party revenue management systems, which can further optimize pricing decisions, guest loyalty management and rewards applications.



Chapter 4: Recommendations

Focus on data analysis and business intelligence. Analytics tools are becoming increasingly sophisticated and serve as a core function of a next-generation PMS. The tools should inform the decisions made in multiple departments and functions across the organization. The insights gained from the tools can have benefits ranging from improving marketing, sales and customer service effectiveness to generating competitive intelligence. Key revenue stakeholders can monitor hotel occupancy trends, guest demographics, market position, and channel profitability. One of the most practical things to monitor is source of business. Simply knowing what percentages of guests book their stays via travel agents, online travel agencies (OTAs), or the hotel website should have a direct impact on revenue management and marketing strategies. If, for example, it becomes clear a specific OTA is bringing in guests who stay longer at a higher ADR, then it may make sense to invest in improving the hotel's ranking on that site. Simply put, hoteliers need to understand relative channel performance at a granular level and place their bets accordingly. With the new breed of BI tools, tailored to meet the needs of the hotel industry, they can. In fact, 92 percent of hotel operators agree these tools are, or would be, either "effective" or "very effective" in helping them manage and optimize their market and channel mix, resulting in significantly increased hotel revenue and profitability for the same amount of marketing spend.

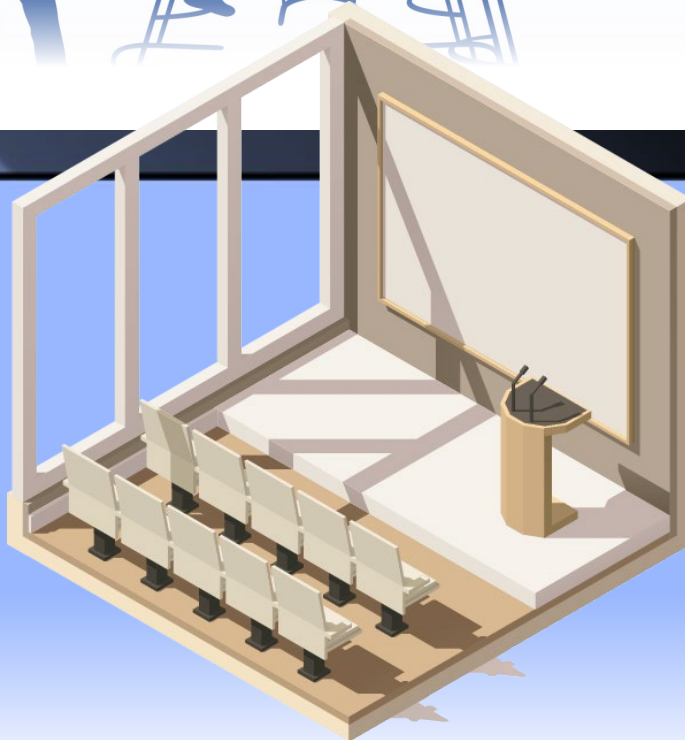
Focus on building a revenue management strategy and culture. A revenue management strategy is a blueprint for improving financial performance over a specific period of time. It should incorporate all of the revenue streams from across all parts of the hotel as well as all of the revenue drivers, from the sales department to the online distribution channels. The strategy should be built upon a solid foundation of revenue goals using targeted RevPAR, GOPPAR (gross operating profit per available room) and other relevant metrics for tracking progress. It should include a timeline with key milestones and spell out the tactics for achieving success. The strategy should be as specific as possible, detailing, for example, how the property approaches pricing. Done right, the strategy will help create cognitive alignment amongst all employees regarding the value of revenue management.

The insights gained from data analysis tools can have benefits ranging from improving marketing, sales and customer service effectiveness to generating competitive intelligence.



Chapter 5

Inside Voices and Outside Voices



Chapter 5: Inside Voices

Hoteliers with first-hand experience with next-generation property management systems tend to have a lot to say about the topic. Following are a few perspectives gleaned from individuals who participated in the survey that produced the research findings included in this Smart Decision Guide.

Guest experience is and will continue to be the focus. One big project right now is a housekeeping automation project. This doesn't sound very sexy but the reality is that it will increase the speed of an early arrival being checked in to a room that wasn't ready when they arrived by 30 to 60 minutes. This will impact guest satisfaction. We want our guests and members to know they are the most important thing at Pinehurst. Without them none of us would be able to do what we do. I believe as long as we remember that, we can't go wrong.

Director of IT, full-service resort

We needed a PMS that would connect well with our proprietary reservation system. The systems needed to link without any problems. Our predecessor [solution provider] was having a difficult time doing that. So for us, that was an important part of the equation, not only with our general managers but also with our other resources. You have to be able to connect [the PMS] directly to all of the different systems the hotel is using in order to run the business efficiently.

CEO, midsize hotel chain

We had a lot of problems with our previous system because of integration issues. Reporting was incorrect. Credit card interfaces weren't working. A lot of things were breaking down during peak times. With the new system, our operations are much more stable. We now have a good functional platform with the option to interface with a lot of different systems in order to create a full end-to-end solution. The reporting is accurate, our pricing is quick and efficient, and the system interfaces with our reservations system and also our sales activities.

Director of IT, limited service hotel group

Our managers aren't sitting in their offices Monday through Friday, nine to five. They're seldom at their desks. They're running around the hotel or they're out making sales calls. They need real-time access to information, no matter where they are. They're not glued to the hotel. They have the freedom to get out and be a part of the community. It's far more efficient. Ten years ago, if you needed to change your rates in the middle of the night you would have to throw on your clothes and run to the office. Now if I see a sudden rise in occupancy and want to make a rate adjustment, I can simply do it from my laptop or smart phone.

Brand President, midsize hotel and resort chain



Chapter 5: Outside Voices

Following are a few additional perspectives from industry observers, including consultants, trade publication editors and market researchers, with insights into next-generation hospitality solutions.

A central challenge for a general manager is to make sure a hotel's various systems will work well together. This can be subtle. Systems may technically connect. But by asking for different information or not updating in real-time, they can cause discrepancies.

Sean O'Neill, "The Evolution of the Hotel Front Desk," *Skift*

In any modern hotel, having a centralized system is critical in order to increase efficiency, avoid time waste and reduce human error, therefore PMS must eventually connect to nearly all the software the hotel is using. But here is where things start to get complicated, because, in order to do that, these software need API access to PMS.

Three in 10 hotel chains experience insufficient support from their PMS vendor. Lack of support services (including slow response times, and inadequate consulting/problem-solving capability) is a major concern and has nearly twice the severity level of any other pain point. While technology deficiencies (integration, functionality and developments) present the second largest cluster of dissatisfaction, somewhat surprisingly, cost is of lesser importance to chains.... Just about one quarter of hotel chains are satisfied with the quality of support, mainly those in North America. Three quarters of European chains expressed their strong dissatisfaction with inadequate response times (most critical issue), followed by cost efficiency, flexibility and the vendor's general problem-solving capabilities.

Simone Puerto, "A Brief History of Property Management Systems," *Tnooz*

Christin Hänsel, Marty Kostmann, Ralph Merten and Michaela Papenhoff, research analysts, h2c's Global PMS Report, 2018

Selecting a PMS is one of the biggest technology decisions that a hotel owner or operator will ever make. Technology moves so quickly that it can be challenging to keep a pulse on the most innovative products in the market and distinguish between vendors.

Jordan Hollander, founder, Hotel Tech Report

Appendix

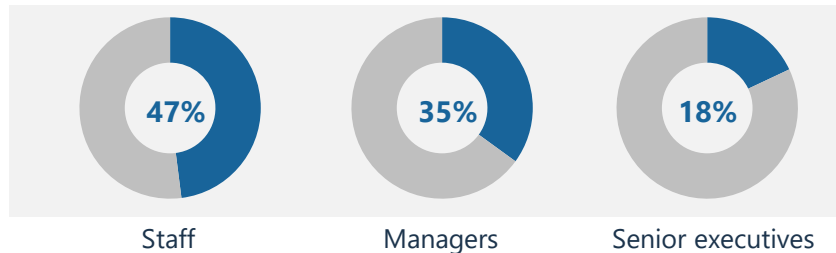
Research Notes and Underwriters



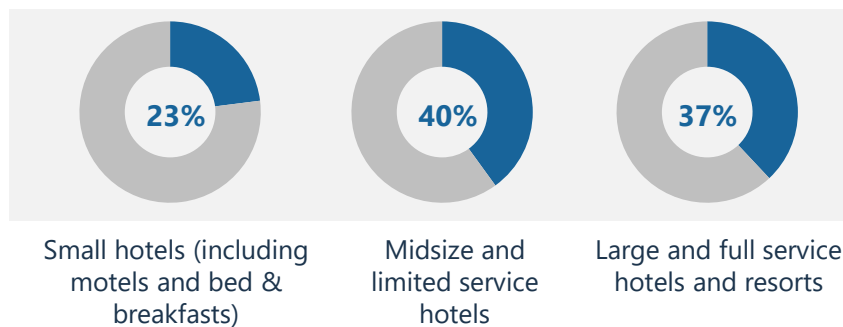
Appendix: Research Notes

In Q3 2018, Starfleet Research conducted an online survey, consisting of both multiple choice and open text questions, to capture the perspectives of industry practitioners with first-hand experience buying and/or using property management systems. Some of the research findings are highlighted in this publication. Following is some basic information about the 257 qualified survey respondents who participated.

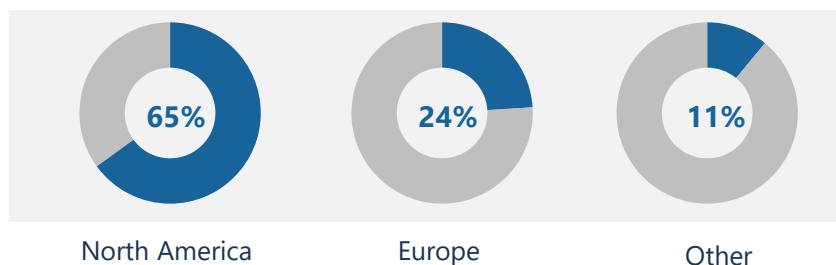
Job level / role of survey respondents



Size / category of survey respondents' hotel (or other lodging property) employers



Geographic location of survey respondents





SkyTouch Technology, an independently operated division of Choice Hotels International, Inc. is the provider of the most widely used cloud-based property management system. Built in the cloud by hotel professionals for hotel companies, SkyTouch Hotel OS is designed to help hotel executives meet their most important strategic objectives: to enhance the guest experience, advance performance, and achieve growth while evolving with changing market needs.

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