



The Revenue & Profit Operating System

Smart RMS investment planning checklist

7 steps for success





Make your next RMS decision strategic, aligned and ROI-focused

Choosing the right RMS is a big decision that can directly impact your hotel's performance, profitability, and efficiency.

Use this quick checklist to guide your evaluation and ensure you're selecting a system that aligns with your commercial strategy.

1. Set your timeline

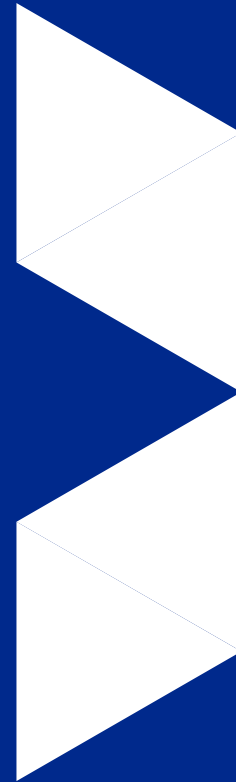
- ☐ Define when your new RMS needs to be fully operational (before high season, before PMS migration, etc).
- ☐ Allow time for vendor selection, internal buy-in, onboarding, and training.
- ☐ Align the RMS deployment with other initiatives (PMS upgrade, integrations).

2. Engage key stakeholders

- ☐ Involve the revenue team early to define goals and pain points.
- ☐ Consult with Sales (especially those managing group and event business) to understand how an RMS could support meeting space optimization.
- ☐ Loop in finance to understand budget cycles and ROI expectations.
- ☐ Ensure IT and operations are prepared for integration needs and support.

3. Define your goals

- ☐ List your must-haves:
 - ☐ Improve forecasting accuracy
 - ☐ Optimize pricing across channels and segments
 - ☐ Drive profitability
 - ☐ Group displacement analysis
 - ☐ Free up team time through automation
 - ☐ Multiple-property management
 - ☐ Dedicated support team
- ☐ Define what success looks like:
 - ☐ Time savings
 - ☐ Revenue uplift
 - ☐ Profitability
 - ☐ ROI
 - ☐ Improved decision-making
 - ☐ Operational efficiency
- ☐ Choose solutions that match your team's capabilities and future growth.



4. Talk to vendors in advance (use our RFP!)

- ☐ Shortlist vendors and issue your RFP to ensure consistent evaluations.
- ☐ Use our RFP template to speed up the process.
- ☐ Request tailored demos reflecting your property type.
- ☐ Ask for ROI projections, onboarding timelines, and integration roadmaps.
- ☐ Discuss change management, training, and long-term support to ensure successful adoption.

5. Build the business case

- ☐ Gather internal data: past performance, forecast accuracy, missed revenue.
- ☐ Use vendor case studies and benchmarks to project ROI.
- ☐ Align with strategic business goals.
- ☐ Map costs, benefits, and estimated payback period.

6. Check tech stack compatibility

- ☐ List all the systems that must integrate with the new RMS:
 - ☐ PMS
 - ☐ CRS
 - ☐ Channel manager
 - ☐ BI tools
- ☐ Confirm any upcoming tech changes (especially PMS upgrades).
- ☐ Prioritize vendors with proven integrations and open API support.
- ☐ Map costs, benefits, and estimated payback period.

7. Plan the rollout

- ☐ Choose the selected RMS.
- ☐ Estimate training and change management needs.
- ☐ Set clear milestones and assign project leads.
- ☐ Consider a phased rollout or pilot program
- ☐ Avoid deploying during peak business periods.

Want to go deeper?

Download our free guide:

Plan for profit: The hotelier's guide to smart RMS investment in budget season