Budget season checklist

Commercial investment for budget season: 7 steps

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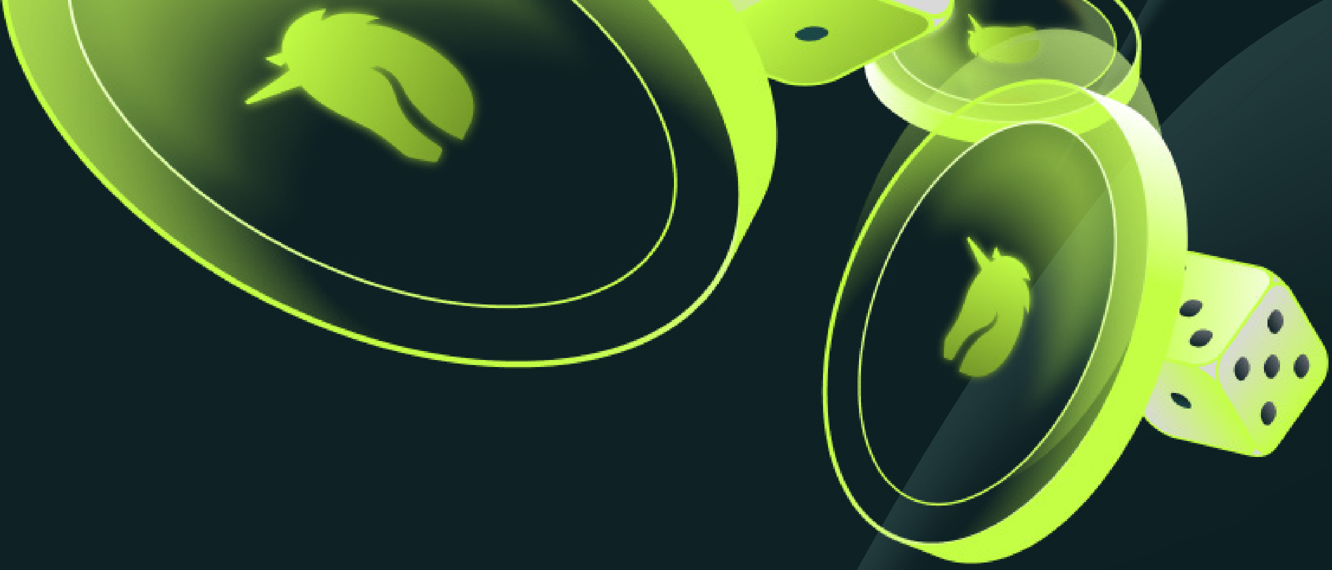

Make your next commercial decision strategic, aligned and ROI-focused

Choosing the right commercial 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. Align your commercial objectives

- [ ] Before evaluating technology, define what you're trying to achieve over the next 12–24 months.
    - [ ] Identify your biggest commercial challenges (forecast accuracy, profitability, business mix, distribution costs, etc.)
    - [ ] Agree on the outcomes you want to improve (revenue growth, margin improvement, operational efficiency, forecasting confidence)
    - [ ] Ensure the investment supports your broader commercial strategy—not just one department.

2. Build your business case

- [ ] Translate the investment into business outcomes your executive team will support.
    - [ ] Estimate the financial opportunity (revenue uplift, margin improvement, operational savings)
    - [ ] Calculate expected ROI and payback period
    - [ ] Consider the cost of doing nothing, not just the cost of investing
    - [ ] Gather internal performance data and external benchmarks to support your proposal

3. Engage the right stakeholders

- [ ] Commercial technology impacts far more than the revenue team.
    - [ ] Finance
    - [ ] Operations
    - [ ] IT
    - [ ] Ownership / Asset Management
- [ ] Ensure each stakeholder understands how the investment supports their priorities.

4. Define your platform requirements

- [ ] Focus on the capabilities your hotel needs, not simply a list of product features. Consider whether your future platform should provide:
    - [ ] Open Pricing
    - [ ] Accurate forecasting
    - [ ] Profi tability insights and benchmarking
    - [ ] Automation of pricing and forecasting
    - [ ] Group optimization
    - [ ] Multi-property management
    - [ ] Commercial reporting
    - [ ] Dedicated onboarding and customer success

- [ ] Define what success will look like:
    - [ ] Revenue growth
    - [ ] Profit improvement
    - [ ] Time savings
    - [ ] Better commercial decision-making
    - [ ] Improved forecast accuracy

5. Evaluate vendors strategically

- [ ] Look beyond the product demos.
    - [ ] Issue a structured RFP (use our template)
    - [ ] Request demos tailored to your property and business model
    - [ ] Ask how the platform supports profitability—not just revenue
    - [ ] Review implementation timelines and onboarding plans
    - [ ] Understand long-term support and optimisation services
    - [ ] Request customer references and measurable results

6. Review your commercial tech ecosystem

- [ ] Budget season is the ideal time to evaluate how your systems work together. Confirm compatibility with:
    - [ ] PMS
    - [ ] CRS
    - [ ] Channel Manager
    - [ ] BI platform
    - [ ] CRM
- [ ] Prioritize vendors with proven integrations and scalable architecture.

7. Plan for successful adoption

- [ ] Technology only delivers value when your team uses it.
  - [ ] Build a realistic implementation timeline
  - [ ] Allocate time for onboarding and training
  - [ ] Assign internal project owners
  - [ ] Establish success metrics before launch
  - [ ] Avoid implementation during peak trading periods where possible
  - [ ] Schedule post-launch performance reviews

Before final approval, ask yourself...

- [ ] Does this investment support our long-term commercial strategy?
- [ ] Will it help us improve profitability, not just revenue?
- [ ] Have we demonstrated ROI in terms the CFO and ownership care about?
- [ ] Does it integrate with the rest of our technology ecosystem?
- [ ] Will our teams actually use it?
- [ ] Will this platform still meet our needs three to five years from now?

Need help building your business case?

Download Plan for profit: The hotelier’s guide to smart commercial investment during budget season to explore performance engineering, executive buy-in strategies, and practical tools including our ROI Calculator.

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