
PMS Implementation Checklist/Template

Use this detailed guide to track progress through each phase of your PMS rollout, from preparation to post-go-live optimization.

Project Setup

- ☐ Assign internal PMS Champion and project team
- ☐ Define vendor point of contact and escalation path
- ☐ Set measurable project KPIs and timeline
- ☐ Confirm network and hardware readiness

Phase 1: Discovery and Data Audit

- ☐ Inventory all current systems (PMS, POS, CRM, RMS, etc.)
- ☐ Assess data quality and flag duplicates
- ☐ Define migration scope and success metrics

Approve final Project Scope and Data Audit Report

Phase 2: Configuration and User Profiles

- ☐ Configure core modules (reservations, housekeeping, accounting)
- ☐ Set up room types, rate plans, and taxes
- ☐ Create user roles and permissions
- ☐ Test workflows with sample data in sandbox environment

Phase 3: Integrations and Testing

- ☐ Map integrations (POS, RMS, channel manager, payments)
- ☐ Conduct sandbox tests for API connections

- ☐ Run pilot in one property or department
- ☐ Document all issues and resolutions

Phase 4: Training and SOPs

- ☐ Deliver department-specific training
- ☐ Create SOP binder or digital manual
- ☐ Track training completion for all staff
- ☐ Collect user feedback and adjust configurations

Phase 5: Go-Live and Hypercare

- ☐ Freeze configurations one week before launch
- ☐ Complete data migration to live environment
- ☐ Ensure 24/7 vendor support during first 72 hours
- ☐ Hold daily check-ins during hypercare period
- ☐ Post-Go-Live Optimization
- ☐ Review audit reports and performance metrics
- ☐ Automate key reports and workflows
- ☐ Schedule quarterly vendor reviews
- ☐ Document lessons learned and future enhancements

Tip: Revisit this checklist during quarterly reviews to ensure continued alignment between operations, IT, and vendor support.