PMS Selection Checklist/Template

Use this detailed checklist to guide your PMS evaluation process from initial research to final selection. Tick the boxes as you complete each step.

Step 1: Define Operational Needs

☐ Property profile (size, type, occupancy patterns)

☐ Workflow customization (check-in/out, housekeeping automation)

☐ Multi-property and multi-currency support

☐ Mobile access and offline capabilities

Step 2: Evaluate Core Functionalities

☐ Reservations and booking management

☐ Front desk and housekeeping modules

☐ Rate and inventory management

☐ Payments and folio management

☐ BI and analytics dashboards

☐ Custom report builder and audit trail

Step 3: Verify Integrations & Compatibility

☐ POS, RMS, CRM, and guest messaging integrations

☐ Accounting and payment reconciliation

☐ API documentation and openness

☐ Certified marketplace or partner integrations

Step 4: Assess Security & Compliance

☐ PCI DSS and GDPR compliance

☐ Data hosting location and encryption standards

☐ Role-based access control and audit logs

Step 5: Plan Implementation & Change Management

☐ Data migration plan (format, timeline, testing)

Project milestones and go-live readiness checklist

☐ Onboarding and training duration

☐ Post-launch optimization and feedback review

Step 6: Evaluate Vendor & Support

☐ Vendor references and case studies

☐ Product roadmap transparency

☐ Regional support and response times

☐ User community or success network

Step 7: Compare Pricing & ROI

☐ Setup, subscription, and additional costs

☐ Cost per room or per property

☐ ROI calculation (6–12 month timeline)

☐ Mid-term review clause and renewal options

Step 8: Finalize Contracts & Exit Strategy

☐ Service Level Agreements (uptime %, response times)

☐ Implementation methodology (phased vs. big bang)

☐ Exit strategy and data handover terms

Tip: Use this checklist alongside your PMS evaluation and RFP templates to ensure a structured transparent selection process that supports long-term operational goals.