EBOOK

The Planet guide to **switching your PMS**

2023

Contents

Hello 3

Investing in the right PMS can be a game changer 4

What to look for in your next PMS 5

What to ask before switching PMS provider 7

What makes a successful PMS? 14

What makes us (a tiny bit) unique? 18

Connected commerce. And why it matters 19

About Planet 20

Hello!

A modern, efficient property management system (PMS) should be a silent partner, guiding you through the day-to-day challenges of running a successful and in demand property.

Whether you are using cloud-based software or an on-premise option, a PMS is the beating heart of your hotel operations. It connects you with your guests, manages them through their stay and keeps track of those oh so important revenues.

There was a time when the thought of switching PMS providers would give the hotel management team sleepless nights. But technology has moved on. Switching PMS should be quick and easy. However, choosing your next PMS, well, that takes careful consideration. And we've written this guide to help you.

> **Say goodbye to sleepless nights. If your guests don't have them, why should you?**

Investing in the right PMS can be a game changer

There are 4 major benefits to switching to a great PMS:

1. Increase your revenue and cut your costs

A good PMS can help you increase your revenue by adjusting rates quickly across all your channels, reducing errors such as overbookings, improving occupancy rates by connecting your inventory to your booking engine, and increasing conversion and upsells. It can also cut your costs by analysing your operational expenses and identifying savings.

2. Achieve operational efficiency

A PMS can integrate multiple systems that wouldn't normally talk to each other, such as your channel manager, guest messaging software, inventory management, revenue management systems and accounting/ reporting software. Good integration saves time, improves efficiency and reduces manual interventions.

3. Enhance the customer experience

Customers are so comfortable with handheld technology that many prefer to use their mobile devices to check-in, check-out, pay for services, request a late check-out, extend bookings, and even access their rooms. A modern PMS makes this possible. And with the customer at its heart, the PMS can store guest information and track their behaviour, making it easy to customise real time offers and communicate with your guests pre, mid and post-stay. You can also create a seamless payment experience, avoiding manual processing of card payments.

4. Comply with data security requirement

Data security is a major concern for hoteliers. A PMS stores personal information, sensitive business data, and customer transactions. In addition to PCI certified card handling, there are data security laws and regulations to consider. For example, countries within the EU will require you to be GDPR compliant. And countries such as Australia, Russia and China do not allow data to be held outside their boundaries. There can be stiff penalties for poor data security and compliance. A good PMS will mitigate this risk for you.

What to look for in your next PMS

The PMS is your hotel's command centre for distribution, availability, pricing, reservations, guest interactions, housekeeping, reporting, billing and communication. We think there are seven key questions to ask when exploring your next PMS solution:

Key features:

Reservations, front desk, maintenance, housekeeping, billing, reporting and analytics.

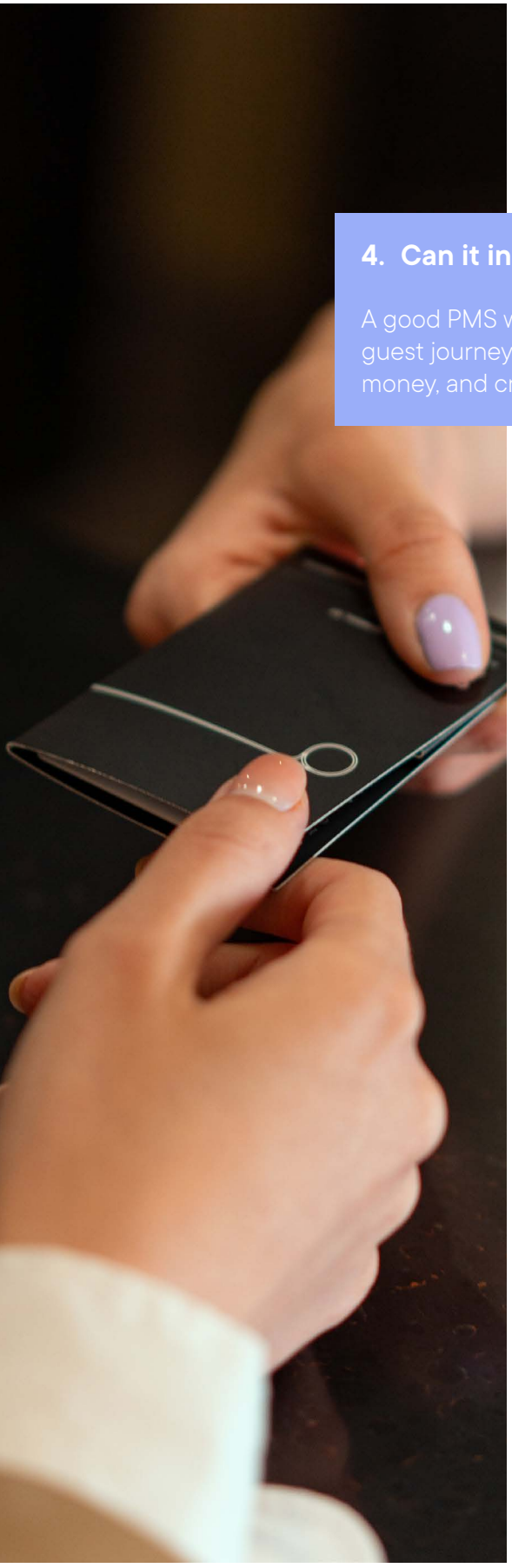
1. Is it on-prem or cloud-based?

We'll start with a biggie. In the past, there were built-in advantages in an on-premise (also known as 'on-prem') PMS that installed the software on your local computers and servers compared with a cloud-based system that was hosted on the PMS provider's server and accessed via a web browser.

Traditionally, a cloud-based PMS was lighter on functionality and features compared to a mature on-prem system, but this has changed. Nowadays, a decent cloud-based PMS requires no plug ins or downloads. They are 100% web based, fully mobile, contactless and accessible from any device and any web browser.

2. Is it easy for us to learn and use?

Intuitive. Simple. Easy to use. Feature rich. These words should pop out when you test drive a new PMS. If not, then look at others. The best systems have a straight-forward workflow that is easy to learn, making light work of any operation.



3. Can it be customised?

All properties are different, and a good PMS allows for this. Ensure your next PMS is highly customisable for the user and the property.

4. Can it increase revenue and reduce your costs?

A good PMS will have fully integrated payment features covering the entire guest journey. This will help you generate more revenue, save time and money, and create a better guest experience.

5. Does it provide a 360-degree view?

If your PMS doesn't centralise control, you've got the wrong one! Look for a multi-language central reservation system that can manage guest information for all your properties on one single screen. Your PMS should be able to handle multi-currency payment processing, have an embedded conference and event management system (known as MICE) for meetings & events, and embedded (integrated) ID and passport scanner as well as embedded Digital registration.

6. Can it integrate with multiple systems?

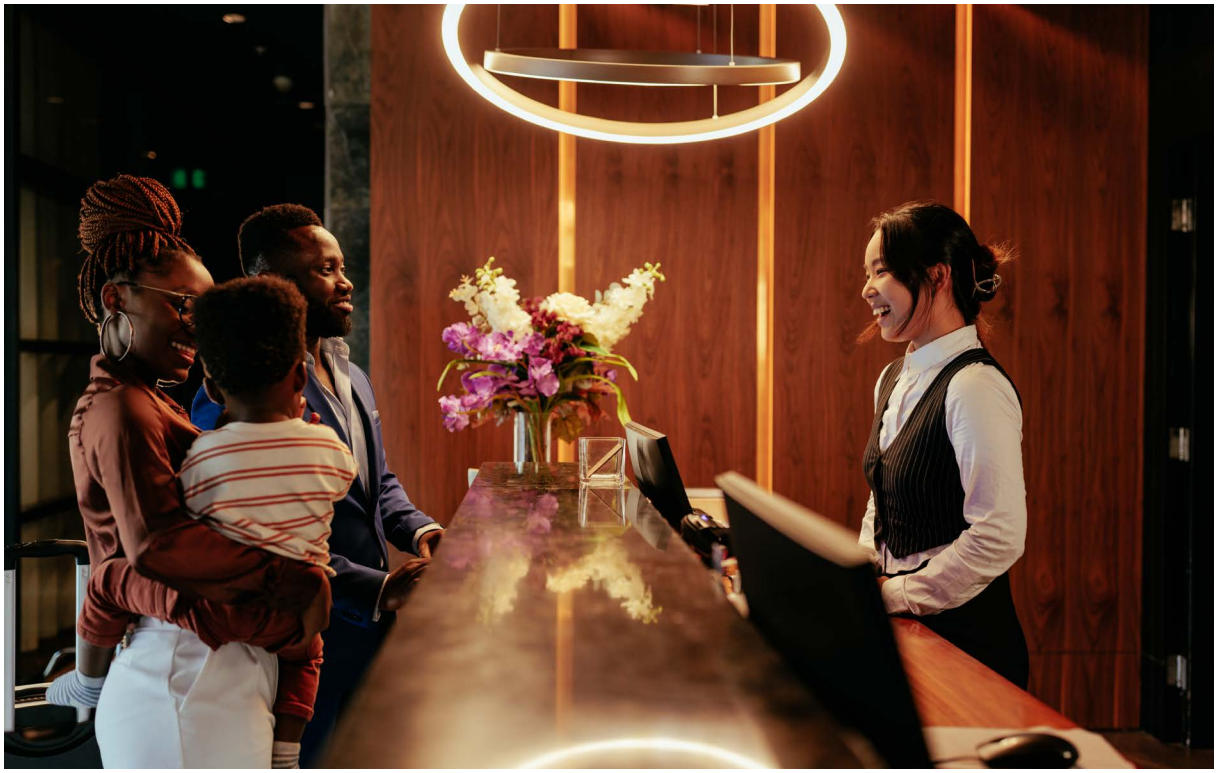
A cloud-based PMS can use Apps to integrate multiple systems that wouldn't normally talk to each other, such as your channel manager, guest messaging software, revenue management systems and accounting/reporting software. For instance, Protel Cloud PMS (by Planet) is a cloud-based solution with over 1,100 integration partners. Good integration saves time and reduces manual interventions, which is something that an on-prem solution may need to resort to.

7. What support will I need?

As a hospitality professional, you will know and appreciate the value of outstanding customer service. What service do you need from your next PMS provider? Down time will cost you time and money. So, it is important that your team can learn the system quickly and be supported when they are stuck. From training, maintenance and system support, ask yourself 'what would world-class support' feel like?

What to ask before switching PMS provider

When it comes to IT systems, the hospitality industry is changing. Quickly. What began life as spreadsheets, has evolved into a connected ecosystem capable of elevating the guest experience, increasing operational effectiveness, and making the bean counters smile.



Make sure you ask any potential PMS provider these questions:

What is the difference between on-prem and cloud-based?

The main difference with on-premise or cloud-based systems is where the software is stored.

As the name suggests, on-prem software is installed locally, on your business's computers and servers. Because it needs to be physically installed, installation and maintenance times can be longer and you may be responsible for maintaining server hardware and software, data backups, storage, and disaster recovery. Just to complicate things, a software originally built for on-prem can also be installed on a server outside the hotel facility. This type of set-up is referred to as a hybrid solution, hosted PMS, or semi-cloud.

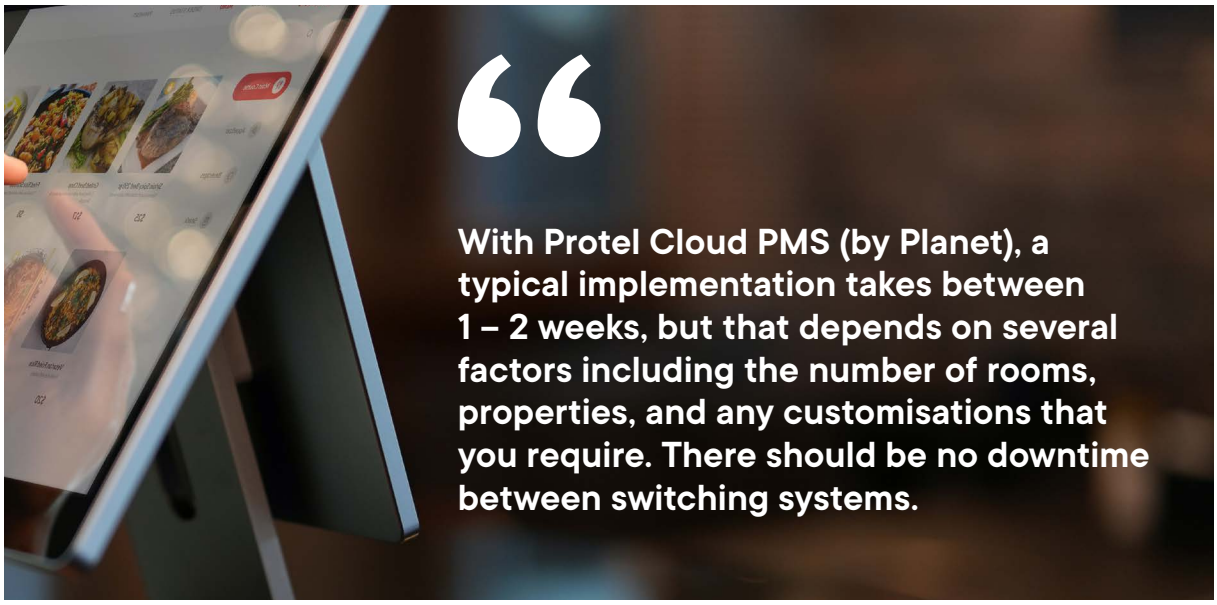
Native cloud-based software is built in the cloud for the cloud from the start. Hosted on the PMS provider's server, it is fully accessed via a web browser from any device of your choice. Compared to on-prem software, cloud-based software can be more flexible, reliable, and secure.

You can leave system maintenance and updates to the cloud PMS provider and have real-time access to systems and data from any device, whether you are located at your hotel or not.

How long will implementation take?

There are 3 main stages to implementation:

- Application set up (setting up rooms, room types, adding rates, and importing or adding existing and future reservations).
- Checking the set up.
- Connecting your channels or channel manager to start taking reservations.



Is your PMS intuitive, simple and feature-rich?

The best systems on the market are easy to learn with a straightforward workflow. Ease of use is important because inducting staff on a new PMS takes time, and the less time it takes to train them, the better.

How quickly can my team get up to speed?

Ask your provider what training they have available. This may include training guides, videos, and virtual support. Pre-empt any issues by asking the PMS provider which aspects of the system can be most tricky to learn and create masterclass training sessions to help the team get off to a confident start. Nominating a PMS system champion can also help; their role is to answer any team queries and if necessary, communicate with the PMS provider.

How secure is your PMS?

Data security is a vital concern. If you are considering a cloud-based PMS system, the vendor you opt for is important. For example, Protel Cloud PMS (by Planet) uses Amazon AWS, the world's leading cloud service provider, offering reliable, scalable, and secure cloud services.

In addition to PCI certified card handling, there are data security laws and regulations to consider. Ask for a copy of your PMS provider's platform documentation and security certification and ensure you understand how their system complies with all territory regulations.

Will your PMS connect with my channel managers?

Leading channel managers vary by region. If you operate in Europe, then you will probably need connectivity to Booking.com. For the US, Expedia is the most popular. Ctrip for China. It is crucial your next PMS provider can accommodate all your booking channels. So, check.

What reports and analysis can the PMS provide?

If you have used the same PMS for a while, then this is a good area to explore, because a good system can provide automated reporting and analysis to save you time and money:

Reports - How easy is it to generate one key report with all the essential information in one place i.e., in-house guests, rooms, arrivals, departures, capacity, and revenue, for this year and last year?

Is it possible to customize the reports and their lay out? Can the PMS provide detailed management reports such as revenue, future calculations, group discounts, top bookers and for MICE (meetings, incentives, conferences, and exhibitions)?

Lists – As the hotel's knowledge base, a good PMS should be able to provide all the essential data you need in logical, easy to read lists. This may include instructions for new staff working with arrivals, in-house and departures, group reservations and even housekeeping lists with guest preferences as well as guest-centric services such as lost and found, wake-up calls, meal plans and birthdays.

Analytics – Analytics tools will help you make strategic decisions based on trends, reports, and customer insight. This could include:

- Revenue and customer relationship analytics of your customers and their spend.
- Business information analytics to pinpoint where to focus marketing and sales efforts.
- Point of sale analysis to let you optimise F&B sales.

How can you help me with regional compliance?

Every region has different regulatory requirements, so it is important that your PMS provider can service your region. Ask them how they will help you comply with the regulations in your region and whether you will be required to do any manual processing. Most modern PMS systems automate regional reporting, but it is important to check.

What success metrics are important? And how does your PMS report them?

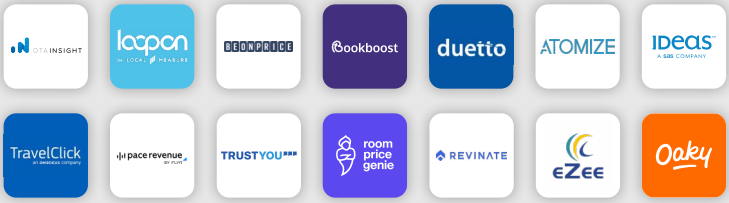
With a wealth of data, it is easy to get lost in the detail. We think there are three key KPI metrics to keep an eye on:

- Occupancy Rate – With data feeds to your booking engine and channel manager, a PMS will track your occupancy rate as well as provide you with real-time inventory availability, as room changes are updated automatically across your channels.
- Guest Satisfaction – Keeping on top of guest satisfaction is easier with a good PMS enabling the front of house team to spend more time on guests and less on manual or administrative tasks. There are sophisticated apps that allow you to ask guests how their experience was, before you ask them for a review.
- RevPAR – Revenue per average room is a useful metric to assess a hotel's ability to fill its available rooms at an average rate. However, it fails to consider the size of a hotel and the mix of room types. With good tools, it should be easy to monitor your pricing strategy and optimise your yield. That's particularly important if your hotel has a mix of low and high-priced rooms.

How will your PMS integrate with our other systems?

The rise of cloud-based systems challenged the on-prem 'all-in-one' solution. Now, many cloud-based PMS systems can be integrated with hotel tech specialists for specific functionalities such as business intelligence, guest activities, lock and keys, minibar, and up-selling. Protel Cloud PMS (by Planet) has taken this to another level with over 1,100 apps on a platform like an App-store, with each app ready to be seamlessly integrated into the protel technology stack.

Protel Cloud PMS has over 1,100 integrations



If you are exploring an on-prem PMS, then ask the supplier if their system is vendor neutral. Your property is probably running on 20-30 different systems. Which ones will you need to switch to fit in with the new PMS? And are you prepared to?

What do your customers say about your PMS?

Before you commit, do as much research as you can. Read case studies. Check out reviews at websites like Capterra and HotelTechReport. Ask the sales team to put you in touch with similar hoteliers who use their system. Ask them what their pain points were and talk about the aspects that most concern you.

How can you support us?

As a hospitality professional, you know the value of outstanding customer service. And you should expect something similar from your PMS provider. Ask them what their support eco-system is like. Do they have an online repository that your staff can go to ask questions or see 'how-to-videos'? Do they have a 24/7 approach to customer service, and if so, what languages do they offer? Will you be serviced by a reliable on-the-ground IT service partner? Global support is built into every PMS product that Planet rolls out. It is available 24/7/365 in 85 languages.

What is your pricing strategy?

The pricing of PMS systems is customised based on each hotel's needs. Be sure to compare like for like:

- Is there an implementation cost?
- Is pricing annual or monthly?
- Are there any one off costs?

What does your development roadmap look like?

It is best to assume you will be using your PMS for the next 3 – 5 years. Is it future proof? Ask the vendor what their development road map looks like, to understand what trends and features they expect to be important.

In our opinion, contactless, mobile messaging, artificial intelligence, and voice activation are four of the fastest growing technologies. Of these, contactless is key. It is a trend that has been building. An increasing number of guests desire a contactless experience for all basic hotel transactions. How will your PMS provider support these growing customer needs?

What makes a successful PMS?

As you have seen, every PMS is unique, just like every hotel. What's important to one hotel, is different to another. To illustrate this, we have gathered some customer experiences. They were delivered by protel which is now known as Protel Cloud PMS (by Planet).

Switching from on-prem to cloud-based software

Customer:

shoreline HOTEL • WAIKIKI®

Coconut and Shoreline Waikiki Hotels, USA

Situation:

The award-winning family friendly Coconut ad Shoreline Waikiki Hotels offers 216 rooms in two separate locations.

Challenge:

Replace an on-prem PMS that had minimal features, an outdated interface and limited reporting and analytics functionality.

Outcome:

"We were looking for a feature-rich PMS that also offered robust reporting. I really like the abilities to schedule reports. We don't print anything anymore. The reports get emailed out to us automatically. protel was also able to complete the entire implementation process within our tight two-week window and perform the switch during the day, just like that. No one had to stay overnight with lots of coffee and little sleep to monitor the process and grab the back-ups. We could hardly believe it."

Alvida Surpia-Jones
General Manager, Coconut Waikiki Hotel

Source: www.protel.net/testimonials/protel-and-coconut-waikiki/

Complex regulations and 24/7 support

Customer:

BW | Best Western Hotels & Resorts

BEST WESTERN Silva Hotel, Romania

Situation:

The hotel has 42 double rooms, 3 junior suites, and 4 apartments and a 2 salon 460 seat restaurant.

Challenge:

Upgrade their PMS to a system that could be adapted to their hotel.

Comply with local regulations by connecting to a dual interface with the Best Western centre in Greece.

Provide a dedicated support team for quick answers and a long-term partnership.

Outcome:

Protel partnered with Bit Soft to provide dedicated support to the hotel team.

"When it comes to the Bit Soft team, I can truly say that they deliver what they offer and more! protel really has proven to be a tool which can serve the most demanding requests of a hotel, but let's not forget that only with a specialized and dedicated partner you can explore and enjoy its full potential."

Alexandru Negrut
Front Office Manager, Best Western Silva Hotel Sibiu

Source: www.protel.net/testimonials/tag-here/

Good integration to third party applications

Customer:

GHOTEL hotel & living, Bochum, Germany

Situation:

The 162-room hotel includes all the facilities you'd expect from a 3* city centre hotel including a car park with e-charging stations. The Group's portfolio includes nestor Hotels, Holiday Inn and Holiday Inn Express Hotels, ibis and Novotel.

Challenge:

Switch to a PMS that was easy to learn and capable of connecting to all existing third-party applications.

Outcome:

"In the course of my professional life, I got to know almost all of the well-known hotel software systems out there. When directly comparing them, protel is definitely my absolute favourite!"

Timm Backhaus
General Manager, GHOTEL hotel & living, Bochum, Germany

Source: www.protel.net/testimonials/digitalization-and-growth/

A multi property PMS that can connect to Expedia

Customer:

Zeus International Hotels & Resorts, Greece

Situation:

The Group manage 10 city and resort hotels across Greece.

Challenge:

Find a multi property solution for a portfolio that offers complex operations and multiple revenue streams. It was critical that the new PMS could connect to a channel manager which would link to Expedia and other Online Travel Agents (OTAs).

Outcome:

"Selecting protel was an informed decision. Working closely with our protel supplier, HIT, who really know how to make workflows as easy as possible, both for city and resort hotels, and create added value on the operational aspects of the software."

Dimitros Hondros
Director of Revenue & Strategy, Zeus International Hotels & Resorts, Greece

Source: www.protel.net/testimonials/working-together-to-maintain-competitive-advantage/

Optimise revenue management across a multi property portfolio

Customer:

OneShot Hotels, Spain

Situation:

The group own and operate 9 boutique hotels across Spain.

Challenge:

Each hotel used different technologies and interfaces, creating communication issues and reporting challenges. Selecting a new PMS was an opportunity to standardise operational procedures and create a set of KPI reports that could help the team optimise revenue performance.

Outcome:

“protel MPE offers a user-friendly hotel technology solution that is highly adaptable for a diverse range of properties and their requirements. The friendly and effective staff provide professional technical and practical support based on a wealth of broad industry knowledge.”

Juanma García
Sales & Revenue Director at One Shot Hotels

https://www.protel.net/testimonials/protel-and-oneshot-hotels/

Install a PMS that can be rolled out to new and existing properties

Customer:

Heikotel, Germany

Situation:

Heikotel operates a growing number of hotels and apartments.

Challenge:

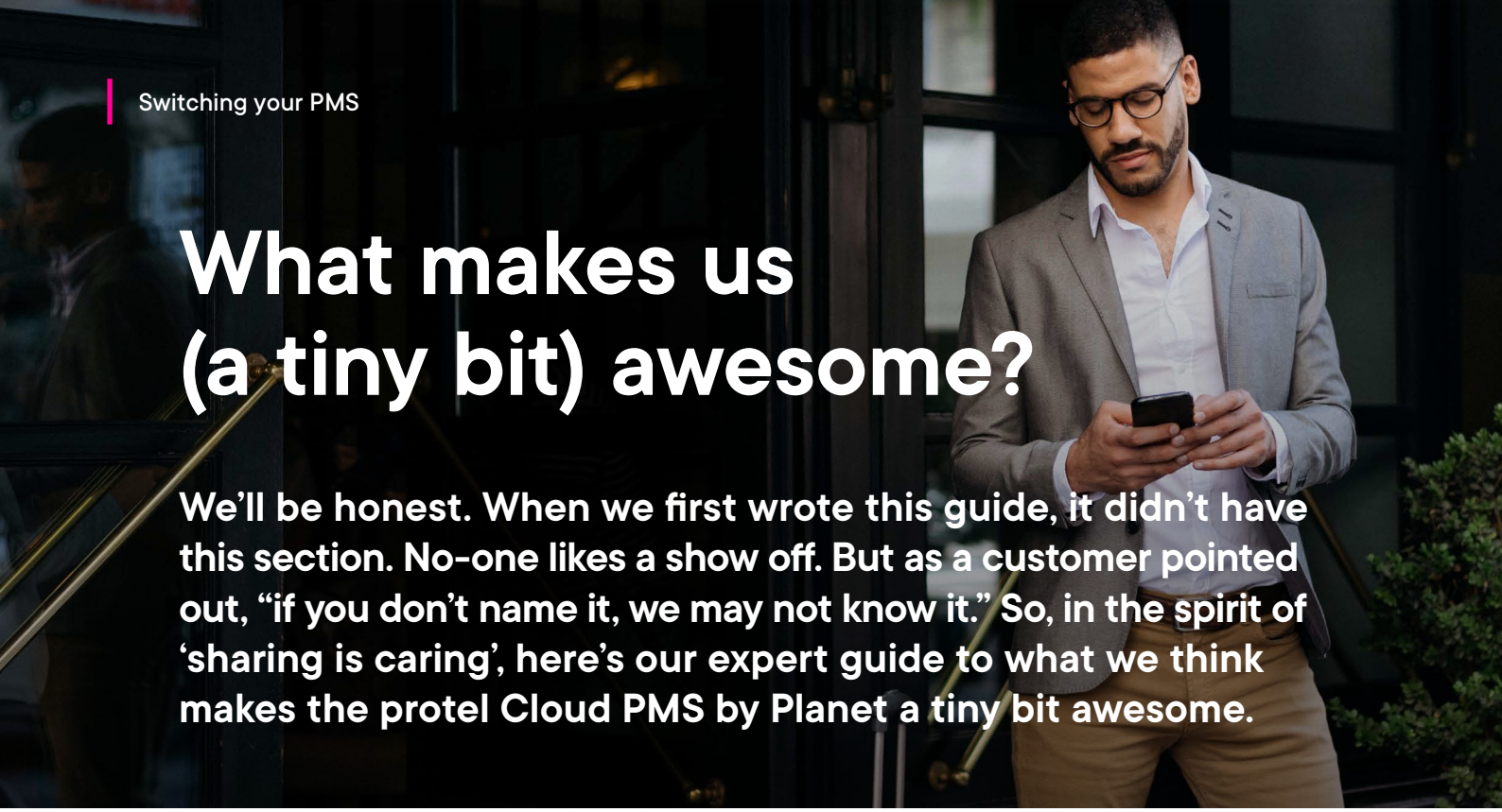
Find a flexible PMS that can standardise procedures across 3 hotels and a range of apartments, with the ability to be adapted to any new property acquisitions.

Outcome:

“We have found our niche in the hotel market, and with the introduction of protel MPE in 2005, we have found the PMS that continues to perfectly suit our needs and demands to this day. protel guarantees smooth processes and solid reliability. This benefits our employees and is ultimately noticed by our guests, too.”

Heiko Fuhlendorf
Owner, Heikotels

https://www.protel.net/testimonials/heikotel-and-protel-partnership/



What makes us (a tiny bit) awesome?

We'll be honest. When we first wrote this guide, it didn't have this section. No-one likes a show off. But as a customer pointed out, "if you don't name it, we may not know it." So, in the spirit of 'sharing is caring', here's our expert guide to what we think makes the protel Cloud PMS by Planet a tiny bit awesome.

100% mobile – Unlike on-prem or semi-cloud solutions, the protel Cloud PMS by Planet is a truly native cloud service. You can access it on any device anywhere around the world. All you need is a signal.

Feature rich. And easy to use – When we released the new interface for the protel Cloud PMS by Planet, we re-defined what 'intuitive' meant. That's a bold claim. And we stand by it. The system is simple and easy to understand. With all the modules and functionality that you will need.

The PMS + approach – We cover the basics. Sure. They're important. But where would you be without our embedded ID scanner, digital registration card app, housekeeping & maintenance app, MICE module and central multi-property capabilities for hospitality groups and chains? Exactly.

Customised by you. For you – Every hotel is unique. And the protel cloud PMS is highly customisable on the property level, with user-defined fields available throughout all modules of the PMS. You can also add your own fields to aid data collection and ensure that the PMS works for all departments.

The World's only all-in-one platform – No one else has a native Cloud PMS + payment (gateway & acquiring) + TV/WIFI/Gift card all-in 1 platform. And we mean no one.

Reports that speak your language – Our drag-and-drop approach helps you build customised reports with metrics that work for your business. You can save them as a pdf or excel document, print, send, or schedule the send at a frequency of your choice.

Over 1,000 integrations at your service – A PMS is only as good as the systems it can integrate with. The protel cloud PMS offers 1000+ integrations to 3rd party solutions and reflects the 28 years of experience and maturity of our organization and products.

14,000 customers and counting – Sometimes in life, there's safety in numbers. And as we prepare to welcome our 15,000th customer, we believe you are in safe hands.

Coming soon. New integrated payment features – The best is yet to come with world-class integrated payment features for the protel Cloud PMS that may even be live when you read this. Ask us now!

Connected commerce. And why it matters

Consumer demand for rich, highly personalised experiences is transforming the hospitality and retail sectors. This has placed new demands on in-person, online and cross-channel payments.

How do you meet those increasing expectations with legacy systems and local supply deals?

At Planet we recognise this can be a daunting prospect for any brand, but we believe we have the answer. And it is called Connected Commerce.

We've been investing in the expertise and systems so that our customers can offer an integrated, seamless experience. The beauty of our world-leading solution is that it can integrate with your current systems seamlessly.

Our feel-good connected commerce platform combines software, integrated payments and revenue generating services, like DCC, to help our partners deliver a richer and more enjoyable customer journey.

Through our connected commerce platform, you'll be able to connect all of your customer channels, both online and off. Your business and people will be able to access real time data across your business. This will let you respond to any customer's request, improving their experience and growing your revenue through greater satisfaction.

Imagine how good you'll feel when all of your outlets, inventory and logistics are integrated, and your costs decrease, and revenues increase. With our feel-good Connected Commerce platform, it has never been easier to make your systems work seamlessly for your customers so you too can transform your customer's expectations.

About Planet

Planet are a global technology leader with industry leading cloud software and payments solutions for the Retail, Hospitality, and Financial Services verticals.

We operate in over 120 markets. We employ more than 2,800 people worldwide. We partner with over 100 banks. And serve over 800,000 merchants.

We combine software, payments and technology to help our customers deliver consistent, convenient and personalised experiences, which meet the changing demands of their own consumers.

Our single end-to-end platform allows retailers to support unified shopper journeys across all channels, including complex processes, such as click and collect, shop and ship, and advanced return management.

For hoteliers, we offer integrated and built-in payments that power digital guest journeys, saving them time and enabling them to generate revenue through integrated value-added services. protel Cloud PMS by Planet (formerly protel Air PMS) was created over 10 years ago with a new user interface rebuilt in 2020. It is intuitive and simple to use with a straightforward workflow that is easy to learn and teach.

We also work with a network of Financial Services Partners around the world to provide global payment processing solutions.