

3 steps

to select the right CRM for your hotel

Step 1: Identify your need



- **Make a list of the procedures or benefits that you're not taking advantage of** (refer to the July 2019 D-EDGE Newsletter).
- Collaborate with other team leaders to **identify their CRM needs** and pool your budgets. In most hotels, CRM is shared with the marketing, revenue, front desk, and concierge teams.
- Answer these 3 questions:
 - **Do you want to provide on-site personalised service?** (if yes, 2-way PMS connectivity is mandatory)
 - **Do you want to make smarter decisions?** (if yes, a Central Profile in your future CRM is mandatory)
 - **Do you want to push direct sales?** (if yes, your CRM should cover website integration, loyalty communication, voucher and social media)

Step 2: Evaluate benefits and set objectives



- Briefly **describe the potential impact CRM will have on revenue, costs or guest service.**
- Think about **how you would like to segment your clientele:** Business/Leisure/Amount spent at the hotel/Lenght of stay / Preferences/...
- Think about how you will **plan your distribution and promotions** according to the **clients segments and their cost of acquisition.**
- **Establish your OTA source rate and calculate revenue projections** if you could shift 5, 10 or 20% of this market to direct sales.

Step 3: Get a quote



- **Shortlist some CRM providers** (here's a non-exhaustive list of recognised CRM for hotels: Cendyn, dailypoint, Sellenity, Serenata)
- Ensure your request includes:
 - **PMS 2-way connectivity in real time,**
 - **Central profile,**
 - **Seamless integration of all the modules that you need** (Communication, loyalty, website integration...)
- **Request a quotation from 1 to 3 CRM vendors** and ask for a custom presentation that resolves your current problems.