



SIMPLE HOSPITALITY

SALES WORKSHEET

PLEASE USE THE FOLLOWING WORKSHEET AS A GUIDE TO HELP YOU GET THE INFORMATION NEEDED TO BUILD A SUCCESSFUL HOSPITALITY SOLUTION FOR YOUR CLIENT.

(NOTE: A * INDICATES REQUIRED INFORMATION)

OWNER'S NAME	
OWNER'S EMAIL	
OWNER'S PHONE	
*PROPERTY NAME	
DESIRED SOLUTION(S) <i>(CIRCLE ALL THAT APPLY)</i>	HOSTED, PRI, ANALOG HANDOFF, SIP TRUNKING
*NUMBER OF ROOMS	
CURRENT SERVICE PROVIDER NAME	
HOW MANY PHONE NUMBERS ARE YOU PORTING?	
HOW MANY FAX NUMBERS ARE YOU PORTING?	
ARE NEW DID'S NEEDED? <i>(PROVIDE AREA/ZIP CODE PREFERANCE AND QTY)</i>	



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(CONTINUED)

DO YOU HAVE A FAX MACHINE?	
DO YOU HAVE OR NEED A VIRTUAL FAX?	
*DO YOU HAVE AN ON-SITE PBX?	
*DO YOU WANT TO KEEP THIS EQUIPMENT?	
*IF ANSWER ABOVE IS YES, WHAT IS THE MAKE AND MODEL?	
CAN I HAVE A COPY OF ALL YOUR CURRENT PHONE INVOICES WITH A BREAKDOWN OF CHARGES?	
CAN I HAVE A COPY OF YOUR PROPERTY MAP?	
USE PROPERTY MAP TO: 1) INDICATE WHERE EACH PHONE IS LOCATED AND WHAT TYPE OF PHONE IT IS. (Admin, Wall Analog 2 Button Phone, Room Phone) 2) INDICATE WHETHER THE PHONE IS CONNECTED TO CURRENT PBX as CAT3 CABLE OR IS VOIP/SIP PHONE/CAT5.	



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***PHOTOS ARE VERY IMPORTANT FOR THIS PROCESS. TAKE/COLLECT PHOTOS OF THE FOLLOWING:**

1) PHONE ROOM - NEED TO DETERMINE IF THERE IS SPACE FOR A RACK AND WHAT THE EXISTING CABLING LOOKS LIKE.

2) ROOMS - NEED A PHOTO OF THE ROOM PHONES, THE QTY IN EACH ROOM, AND A PHOTO OF THE DESI LABEL ON THE FRONT OF THE ROOM PHONE WHICH TYPICALLY GIVES DIRECTIONS ON DIALING OUT.

3) ADMIN PHONES

DETERMINE WHAT THEY LIKE ABOUT THEIR CURRENT PHONE SYSTEM.

DETERMINE WHAT THEY DON'T LIKE ABOUT THEIR CURRENT PHONE SYSTEM.

***DETERMINE WHAT THEIR FEATURE WISH LIST FOR A NEW SYSTEM WOULD BE.**

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<p>WHAT IS THEIR E911 ADDRESS?</p>	
<p>DETERMINE HOW THEY CURRENTLY HANDLE 911 CALLS.</p>	
<p>DETERMINE HOW INCOMING CALLS ARE CURRENTLY HANDLED.</p> <p>1)DO GUEST ROOMS RECEIVE DIRECT CALLS OR ARE THEY ANSWERED AT THE FRONT DESK AND TRANSFERRED?</p> <p>2)ARE SALES/RESERVATIONS HANDLED AT THE PROPERTY? DO THEY NEED A CALL GROUP OR CALL QUE SET UP FOR THIS? HOW MANY USERS NEED TO BE IN THE CALL GROUP?</p> <p>3)DOES THE AUTO-ATTENDANT ANSWER INSTEAD OF THE FRONT DESK AND CAN A CALLER ENTER AN EXTENSION TO GO TO A ROOM EXTENSION?</p> <p>4)DO THEY UTILIZE VOICEMAIL FOR GUEST ROOMS?</p>	

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(CONTINUED)

<p>*WHAT ARE THEY UTILIZING TODAY FOR THEIR CHECK-IN/OUT SYSTEM OR PROPERTY MANAGEMENT SYSTEM (PMS)?</p>	
<p>*IF THEY HAVE A PMS, WHAT IS IT?</p>	
<p>IS THEIR PMS WEB-BASED OR IS THERE A DEDICATED SERVER ON-SITE THAT HOUSES THIS SOFTWARE?</p>	
<p>*ARE THEY UTILIZING A CALL ACCOUNTING SYSTEM AND IF SO, WHO IS THE MANUFACTURER?</p>	
<p>*ARE THERE ELEVATOR PHONES, POOL SIDE RING DOWN (RED PHONES), EMERGENCY WALL PHONES IN THE FITNESS CENTER, OR ANY OTHER PHONES ON THE PROPERTY OUTSIDE OF ROOM PHONES?</p>	
<p>ARE THERE ANY RESTAURANTS ON THE PROPERTY THAT GO THROUGH THE PHONE SYSTEM? DO THEY HAVE A DID DIRECTLY TO THEM?</p>	