System Migration Planning Template

Step-by-Step Guide to Migrating to Smart Hotel Locks

Migrating from traditional mechanical or magnetic stripe locks to smart lock systems requires careful planning. This template guides you through each phase to ensure a smooth transition with minimal guest disruption.

Project Overview

Property Name: _____

Project Manager: _____

Number of Locks to Replace: _____ Property Type: _____

Current System: _____

New System Vendor: _____

Project Start Date: _____ Target Completion: _____

Total Budget: $_____ Contingency (10%): $_____

Migration Timeline & Phases

Status	Phase	Duration	Start Date	End Date
&	**Phase 1: Planning & Preparation**	**4-6 weeks**	___/___	___/___
&	**Phase 2: Infrastructure Setup**	**2-3 weeks**	___/___	___/___
&	**Phase 3: Pilot Installation**	**1-2 weeks**	___/___	___/___
&	**Phase 4: Full Rollout**	**4-8 weeks**	___/___	___/___
&	**Phase 5: Testing & Optimization**	**2 weeks**	___/___	___/___
&	**Phase 6: Training & Handover**	**1-2 weeks**	___/___	___/___

Phase 1: Planning & Preparation

1.1 Requirements Gathering

- & Document current lock system (type, quantity, locations)
- & Identify all stakeholders (GM, IT, Front Desk, Housekeeping)
- & Define success criteria and KPIs
- & Assess PMS integration requirements
- & Determine mobile key necessity
- & Review compliance requirements (ADA, fire codes)

1.2 Vendor Selection & Contracting

- & Issue RFP to 3-5 qualified vendors
- & Schedule vendor demos and site surveys
- & Check references and visit reference properties
- & Compare total cost of ownership (5 years)
- & Negotiate contract terms and SLAs
- & Finalize purchase order and payment schedule

1.3 Site Assessment

- & Conduct door compatibility survey (all rooms)
- & Verify door thickness, backset, and hand
- & Identify doors requiring modification
- & Test WiFi/network coverage in all areas
- & Assess server room capacity
- & Document special doors (oversized, fire-rated, ADA)

1.4 Project Planning

- & Create detailed project schedule
- & Identify low-occupancy periods for installation
- & Determine phased vs full-property approach
- & Plan guest communication strategy
- & Allocate budget for contingencies
- & Establish change control procedures

Phase 2: Infrastructure Setup

2.1 Network & Server Preparation

- & Install lock management server (on-premise or cloud)
- & Configure network switches and access points
- & Set up VLANs for lock system traffic
- & Configure firewall rules and security
- & Test network connectivity to all lock locations
- & Set up backup and disaster recovery

2.2 PMS Integration Configuration

- & Install integration middleware if required
- & Configure API connections and credentials
- & Map room numbers to lock IDs
- & Configure user roles and permissions
- & Test check-in/check-out workflows in staging
- & Verify data synchronization accuracy

2.3 Encoding Station Setup

- & Install encoder hardware at front desk
- & Configure encoder settings and templates
- & Test key card encoding functionality
- & Set up mobile key distribution (if applicable)
- & Configure key card design and printing
- & Train front desk on encoder operation

2.4 Access Control Configuration

- & Define access levels (guest, staff, master, emergency)
- & Configure time zones and schedules
- & Set up housekeeping and maintenance access
- & Configure emergency override procedures
- & Test all access levels in pilot area
- & Document access control policies

Phase 3: Pilot Installation

Install locks on one floor or wing to validate approach before full rollout.

Pilot Scope

Number of pilot locks: _____ (recommended 10-20 rooms)

Pilot floor/area: _____

Mix of room types: & Standard & Suite & ADA & Connecting

Include staff areas: & Yes & No

Guest notification: & Posted signage & Personal contact

Pilot duration: _____ (recommended 1-2 weeks)

Pilot Success Criteria

& 100% of locks operational and communicating with system

& Zero guest lockouts (keys work on first try)

& PMS integration working correctly (auto key generation)

& Staff can operate system without issues

& Battery levels stable (no unexpected drain)

& Installation time per lock meets target (30-45 min)

& No guest complaints about lock operation

& All mechanical functions working smoothly

Lessons Learned from Pilot

Phase 4: Full Property Rollout

Selected Rollout Approach: & Floor-by-Floor & Full Property & Wing/Building

1. Floor-by-Floor (Recommended)

Best for: Properties with 50+ rooms, occupied during installation

Pros: Manageable scope • Easy quality control • Minimal guest disruption
Cons: Longer total timeline • Dual system operation

2. Full Property (All at Once)

Best for: Small properties (<50 rooms), during renovation closure

Pros: Fastest completion • Single cutover event • No dual systems
Cons: High risk • Requires property closure • Large crew needed

3. Wing/Building Sequential

Best for: Multi-building resorts, campus-style properties

Pros: Natural grouping • Can isolate network issues • Flexible pacing
Cons: Complex logistics • Multiple cutovers

Daily Installation Schedule Template

Time	Activity	Responsible Party
7:00 AM	Installer team arrives, collect materials	Installation crew
7:30 AM	Review rooms to be completed today	Project manager
8:00 AM	Begin installations (out-of-service rooms first)	Installers
10:00 AM	Progress check, address any issues	Project manager
12:00 PM	Lunch break	All
1:00 PM	Resume installations	Installers
3:00 PM	Quality control inspection of completed rooms	QA inspector
5:00 PM	Update system, test all locks installed today	IT/vendor
6:00 PM	Daily wrap-up, plan tomorrow	Project manager

Phase 5: Testing & Optimization

5.1 Functional Testing

- & All locks respond to guest keys within 1 second
- & Staff/master keys work on all authorized doors
- & Mobile keys activate and function properly
- & Privacy/DND mode prevents staff entry correctly
- & Emergency override keys work
- & Audit logs capture all access events accurately

5.2 PMS Integration Testing

- & Check-in creates keys with correct validity dates
- & Check-out deactivates keys immediately
- & Room status updates sync in real-time
- & Guest name appears in lock audit log
- & Late checkout extends key validity
- & Room moves update lock access correctly

5.3 Performance Testing

- & System handles peak check-in load (50+ simultaneous)
- & Network latency < 100ms for lock commands
- & Battery levels stable across all locks
- & No locks showing unusual power drain
- & Encoder queue time < 3 seconds per key
- & Dashboard loads within 2 seconds

5.4 Security & Compliance Testing

- & Expired keys cannot access rooms
- & Wrong room keys properly rejected
- & Audit logs tamper-proof and encrypted
- & Administrative access requires authentication
- & Fire egress works (interior handle always opens)
- & ADA compliance verified (handle force < 5 lbs)

Phase 6: Training & Handover

Role	Duration	Key Topics	Completed
Front Desk Staff	**2 hours**	**Key encoding, check-in/out, troubleshooting**	**&**
Housekeeping	**1 hour**	**Using housekeeping keys, status updates, DND**	**&**
Maintenance	**2 hours**	**Battery replacement, basic troubleshooting**	**&**
IT Staff	**4 hours**	**System admin, reporting, backup/recovery**	**&**
Management	**1 hour**	**Dashboard, reports, vendor escalation**	**&**

Final Handover Checklist

- & All locks installed and tested (100% operational)
- & PMS integration fully functional
- & All staff trained and certified
- & Documentation provided (user manuals, technical specs)
- & Warranty registration completed
- & Support contact information distributed
- & Spare parts inventory established
- & Maintenance schedule created
- & Emergency procedures documented
- & Old system decommissioned and removed
- & Project closeout report completed
- & Lessons learned documented for future reference

Project Completion Sign-Off

Project Manager: _____ Signature: _____ Date: _____

Vendor Representative: _____ Signature: _____ Date: _____

Property GM: _____ Signature: _____ Date: _____