

Operational Change Workshops

A companion to “[Clarify Before You Build](#)”



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How to use this resource

This deck is designed as a working tool, not a presentation.

Use it to guide real conversations, map problems clearly, and align your team before building begins.

The goal is to create clarity, not perfection.

Capture what you know, surface what you don't, and let the process reveal what is truly needed.

Use this worksheet to follow along with an operational change you need to make.

Operational Change Workshops

- Define problem & outcome
- Identify decision-making data & assign ownership
- Assess data capturing, storage, and access
- Define finish line
- Identify risks
- Map communication



What problem are we solving?

In one sentence, what is the core problem?

Guests receive **inconsistent** information about pet stays, team members are **unsure** of the rules, and housekeeping sometimes encounters pets **unexpectedly**. This affects guest trust and puts **unnecessary** stress on staff.

Who experiences the problem?

Guests, Front Desk, and Housekeeping.

What pain does this cause the guest or team?

Guests feel **unsure** about charges. Front Desk has to reverse or add fees **after** the fact. Housekeeping adjusts workloads on the fly which creates avoidable **strain**.

Outcomes

What outcome are we trying to create?

A clear, kind, and predictable pet stay workflow that supports team members and gives guests a **smooth, consistent experience** from booking to checkout.

Define success in one sentence

Every pet stay is identified early, communicated well, and reflected accurately across all systems so staff feel supported and guests feel cared for.

What will look or feel different when this succeeds?

Teams move with **confidence**. Guests hear one **clear** message. Housekeeping knows exactly which rooms require additional care. No one is guessing.

Rank the intended outcomes by priority

1. Empower staff with clarity
2. Create seamless guest experience
3. Stabilize revenue by eliminating leakage

What decisions will this data inform?

List each decision this data should support

- How to communicate fees and rules to guests in a caring, consistent way
- How housekeeping schedules their workload for pet rooms
- When and how fees should be applied correctly
- Longer-term staffing and forecasting

Who makes those decisions? Managers, Supervisors, Staff

Front Desk Supervisor, Housekeeping Manager, GM.

How often are those decisions made?

Real-time and daily.

Who owns the input?

Data Element	Who provides it?	Who maintains it?	Risk or Gaps*
Pet declaration	Guest	PMS or FD	Guest does not disclose, unclear workflow
Pet flag in PMS	FD or automatic from booking	FD	Forgetting to toggle field
Pet fee rules	Management	Management	Rules unclear or inconsistently trained
HK pet-cleaning ticket	PMS automation or FD	HK	Ticket not opened or closed
Fee posting	FD or automation	FD	Fee added late or missed

*Risk/Gap Assessment:

Are the people providing the data empowered and trained?

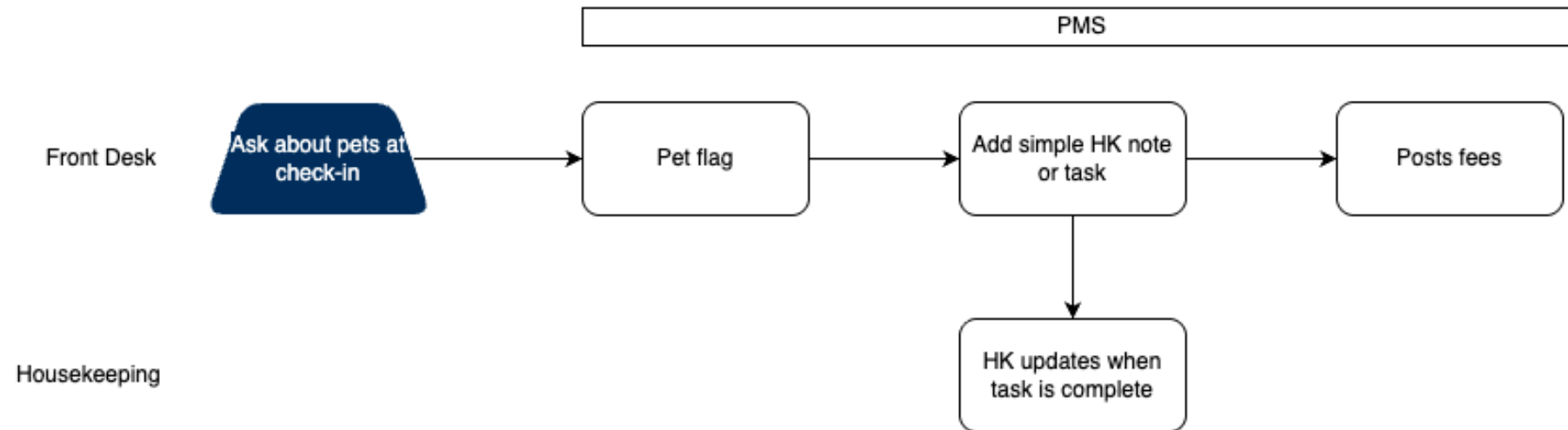
Partially. Both FD and HK need consistent training tied to system workflow.

How will this data be captured, stored, and accessed?

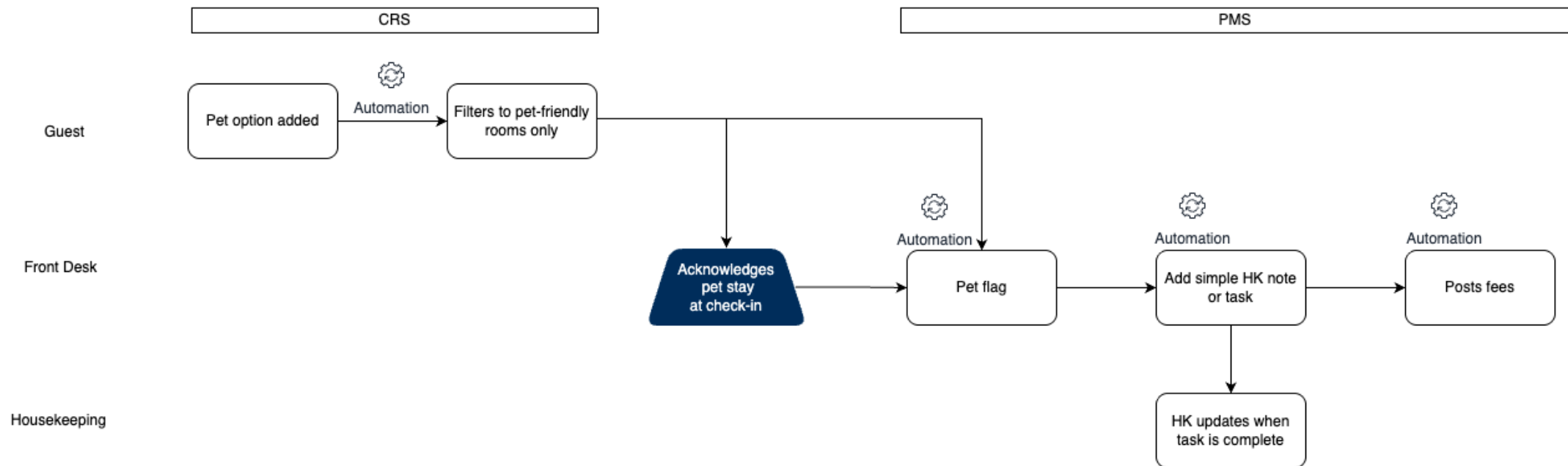
- **Systems involved:** Booking engine, PMS, (KP system if not PMS), automated tasking.
- **Ideal Workflow**
 - Guest selects “pet stay” in booking engine
 - System displays only pet-friendly rooms
 - Pet flag auto-populates in PMS
 - Fee auto-posts
 - Housekeeping ticket opens automatically
 - Team members simply verify details at check-in
- **Does the system already collect what we need?**

Partially.
The PMS can store pet flags, post fees, and display notes for housekeeping, but the booking engine does not currently require guests to declare pets and the PMS does not enforce the pet field as required. Automation exists, but it is not fully configured or connected end-to-end.
- **If not, how will be capture it? (training, new fields, new tech, etc.)**
 - Add a required pet declaration field at check in
 - Make the PMS pet flag mandatory before completing check in
 - Create a simple housekeeping task or note for all pet rooms
 - Update pre arrival messaging to encourage upfront disclosure
 - Train FD and HK on the new workflow and how to verify accuracy
 - In the ideal future, add a pet option to the booking engine so pet friendly rooms and PMS flags auto populate
- **Who needs access to the output?**
 - **Front Desk** to confirm pet stays, answer guest questions, and ensure the fee is correct
 - **Housekeeping** to know which rooms require additional cleaning time and care
 - **Accounting** to reconcile pet fee revenue and ensure accuracy
 - **Management/GM** to review trends, identify training gaps, and oversee policy alignment

Data Mapping – Current Workflow



Data Mapping – New Workflow



Define “Done”

What does “done” look like for this build?

- Define requirements
 - ☐ Clear, people-first pet stay rules
 - ☐ Required pet field in PMS
 - ☐ HK flag or task automation
 - ☐ One-page guide for FD and HK
 - ☐ Training session for both teams
 - ☐ Five-day testing and refinement period
- Dashboard or report format
- Update frequency: **Real-time**
- Automation level: **Partial now, scalable later**
- Testing Period: Five Days
- Go-live: After refinement

What does success look like:

30 days

- ✓ Most pet stays are logged correctly
- ✓ Room flags appear for HK
- ✓ Staff understand new rules and follow them
- ✓ Missed pet fees noticeably decrease

60 days

- ✓ PMS data becomes reliable across FD, HK, and accounting
- ✓ Guest experience improves, few mixed messages
- ✓ Pet fee capture is stable, only occasional misses

90 days

- ✓ Zero missed pet fees across full month
- ✓ HK never encounters unexpected pets
- ✓ Leadership sees clear operational and revenue lift from the new workflow

Risks and Gaps

Risks – What could go wrong, stall the project, or create problems?

- Staff forget to ask about pets
- PMS field not set as required
- Guest intentionally hides pet
- Housekeeping does not check the PMS before cleaning

Assumptions – What are we believing to be true without confirming it?

- All teams understand and follow the new rules
- The PMS supports required fields
- Housekeeping references daily room sheets or app notes
- Guest communication at booking is accurate

Dependencies (people, vendors, systems)- What people or systems must be in place for this to work?

- PMS vendor for configuration
- Management approval of fees and rules
- Cross-department training
- Accurate pre-arrival communication templates

Communication Map

Role	What they need	When they need it	How it will be shared
Front Desk	Pet declaration steps & rules	Before go-live	Training + SOP
Housekeeping	Daily list of pet rooms	Every shift	App flag or printed sheet
Accounting	Fee posting confirmation	Daily	PMS export
GM	Progress and impact	Weekly	Email summary

Alignment

Summarize the aligned version for this build.

- What are we creating?
- Who is it for?
- What problem does it solve?
- What will success feel like?
- What are the boundaries?
- What long-term value does it create?

Summary

We are **building** a simple, consistent pet stay process that supports our team and gives guests a clear, **predictable** experience. Pet stays will be logged **accurately** and communicated across departments so no one is surprised and the workflow runs **smoothly**. As clarity improves, missed fees resolve naturally and operations become steadier for everyone involved.

CLV Consultants

We can guide your team through these workshops, translate your insights into a clear plan, and carry the project across the finish line.

Our work includes:

- Leading cross-department conversations that surface the real problems
- Creating actionable project plans
- Executing and managing every moving part
- Vendor management and coordination

If you want clarity, alignment, and execution without the overwhelm, we are here to partner with you.

Email us: info@clvconsultants.com

Download Companion **Operational Changes Workshops** Powerpoint Here

