Lodgely

Business Operations

Lodgely Client Discovery Questionnaire

Purpose: to understand how your property runs today, so we can recommend the right solution and give you a fixed quote. It takes 20 to 30 minutes. If you do not know an answer, write "not sure". We can fill gaps on a call.

Everything you share is treated as confidential and used only to prepare your proposal.

Property name	
Completed by (name, role)	
Phone / WhatsApp / email	
Date	
Lodgely contact	Chris Yiga Walter

1. About the property

1. Type: ☐ Safari lodge ☐ Boutique hotel ☐ Guesthouse ☐ Serviced apartments ☐ Other: ____
2. Location and website (if any): ____
3. Who owns the property, and who runs it day to day? ____
4. How many rooms/units, and of which types (e.g. tents, cottages, family rooms)? ____
5. High and low season months? ____
6. Is the property currently trading, being built, or being refurbished? ____

2. Rooms and rates

7. Do you have fixed rates, seasonal rates, resident/non-resident rates, packages? ____
8. In which currencies do you quote and get paid (USD, UGX, other)? ____
9. Do you offer meal plans or inclusive packages (B&B, half board, full board)? ____
10. What are your cancellation and deposit policies today? ____
11. Who is allowed to give discounts, and how are they recorded? ____

3. Booking channels

12. How do bookings reach you today? (tick all)
    ☐ Phone ☐ WhatsApp ☐ Email ☐ Walk-in ☐ Own website ☐ Booking.com ☐ Airbnb ☐ Tour operators/agents ☐ Other: ____
13. Roughly what share comes from each? ____
14. How do you stop double bookings today? ____
15. Do you need your website and your system to share one availability calendar? ☐ Yes ☐ No ☐ Not sure
16. Do you need a link to Booking.com or other channel managers? ☐ Yes ☐ No ☐ Not sure

4. Payments and money

17. How do guests pay? ☐ Cash ☐ MTN Mobile Money ☐ Airtel Money ☐ Card ☐ Bank transfer ☐ Other: ____
18. Do you take deposits? How much, and how are they recorded? ____
19. Which payment gateway, if any, do you use online? (e.g. Pesapal) ____
20. How do you issue receipts and invoices today? ____
21. Are you registered for VAT, and do you issue EFRIS receipts or invoices? ☐ Yes ☐ No ☐ Not sure
22. Who reconciles cash, Mobile Money and bank takings, and how often? ____

5. Departments

23. Which departments earn or spend money? ☐ Rooms ☐ Restaurant ☐ Bar ☐ Activities/tours ☐ Laundry ☐ Spa ☐ Shop ☐ Transport ☐ Other: ____
24. For restaurant and bar: do you use a point-of-sale today? Do you track stock? ____
25. Are guest charges (meals, drinks, activities) added to the room bill? ____
26. How are expenses recorded and approved? ____

6. Staff and roles

27. How many staff use a computer or phone for work? ____
28. List the roles (e.g. reception, accountant, restaurant, manager, owner) and what each needs to see or do: ____
29. Who should NOT see certain information (e.g. revenue, salaries)? ____
30. How comfortable are your staff with computers and smartphones? ☐ Very ☐ Fairly ☐ Need training

7. Reporting and the owner's view

31. What do you want to know every day? (e.g. revenue by department, occupancy, balances owed) ____
32. What reports do you produce today, who makes them, and how long do they take? ____
33. Where is the owner or manager when they need this information (on site, travelling, abroad)? ____
34. What decisions are hardest to make because information is missing? ____

8. Current systems and equipment

35. What software or tools do you use today (notebooks, Excel, PMS, POS, accounting software)? ____
36. What do you like about them? What frustrates you? ____
37. Do you have existing data to bring across (guest lists, bookings, rates)? In what format? ____
38. Devices: computers, tablets, phones, printers? ____
39. Internet: provider, reliability, and any outages in a typical week? ____
40. Is there a backup power supply (solar, generator)? ____

9. Problems and goals

41. What are the top three problems you want solved? ____
42. Have you lost money or trust through missing records, double bookings or disputes? Describe. ____
43. What does success look like six months after go-live? ____

44. Is there anything you tried before that did not work? ____

10. Website (if applicable)

45. Do you already have a domain name and email? ____
46. Do you have photos, a logo, room descriptions and a brand colour? ____
47. Websites you admire, and what you like about them: ____
48. Languages needed: ☐ English ☐ Other: ____

11. Timing, budget and decision

49. When do you need to be live? Any fixed dates (e.g. start of high season)? ____
50. Budget range you have in mind: ____
51. Who decides, and who else should be in the discussion? ____
52. Would you prefer to pay in stages? (Our standard is 50% to start, 30% at a working prototype, 20% at handover.) ____

12. Anything else we should know?

For Lodgely use only

Meeting date / format	
Attendees	
Key pain points	
Recommended package	☐ Website ☐ Website + booking ☐ Management system ☐ Both ☐ Other
Open questions	
Next step and date	