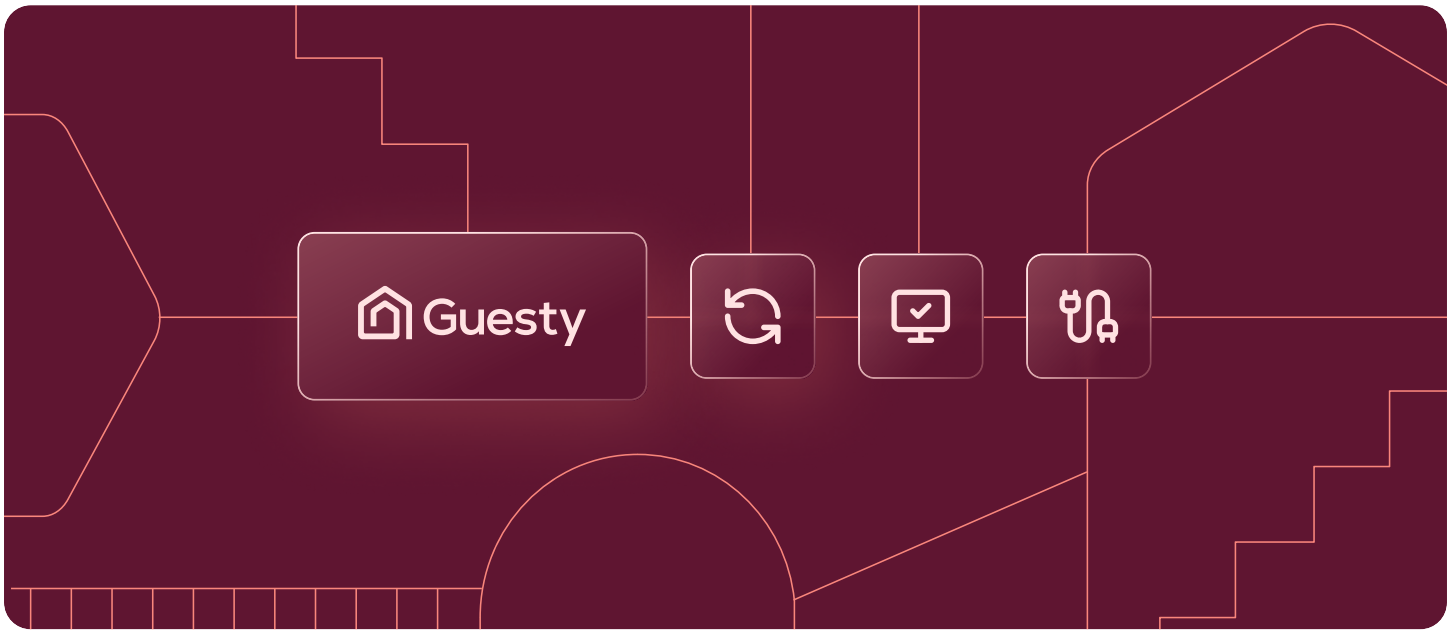
Guesty

Guesty switch kit: Your complete onboarding guide

Switching PMS can sound intimidating, but with the right platform and support, it can be a smoother process than you might think.



From day one to *go-live*: Your supported journey

At Guesty, we've refined our onboarding process through thousands of successful migrations from all major PMSs, and we continue refining it based on customer feedback and evolving needs. We're constantly investing in new tools, training resources, and process improvements because your successful transition is our top priority. Your data, listings, and workflows are transferred securely and quickly, without any business interruption.

From the moment you connect with us to your onboarding graduation, you'll experience a smooth and simple transition powered by **top-notch technology supported by white-glove service.** Together, we'll recognize and define your goals, guide you every step of the way and share best practices, and get you up and running and ready to perform at your peak.

Onboarding is usually completed in 30 days. Our proven 5-step program equips you with the knowledge and confidence to streamline operations, maximize efficiency, and unlock growth on your new property management platform.

30
Day completion

0%
Interruption

Thousands
of migrations

24/7
Global support

What makes onboarding to Guesty *different*

We've built industry-first innovations that solve the traditional pain points making PMS switching stressful. Take our view-only connection, for example. It lets you import properties instantly while keeping existing systems running, eliminating the forced "rip and replace" approach that disrupts operations. You're never figuring things out alone, either. From day one, you're matched with a dedicated switch team that works hand-in-hand with you through every milestone, bringing a proven methodology refined through thousands of successful migrations to handle your specific transition challenges, regardless of which PMS you're leaving.

Our support doesn't end at go-live. Your customer success manager remains dedicated to your success, while 24/7 global support and technical program manager assignment ensure you always have expert help available whenever you need it.



Your *dedicated* team & technology

Meet your switch team

Customer success manager

Your main point of contact and business advocate throughout the entire journey, and beyond. They learn your business goals and ensure every aspect of onboarding aligns with your success criteria.

Implementation specialist

Your technical setup and configuration expert who handles the complex behind-the-scenes work of data migration, system configuration, and workflow automation.

Accounting specialist:

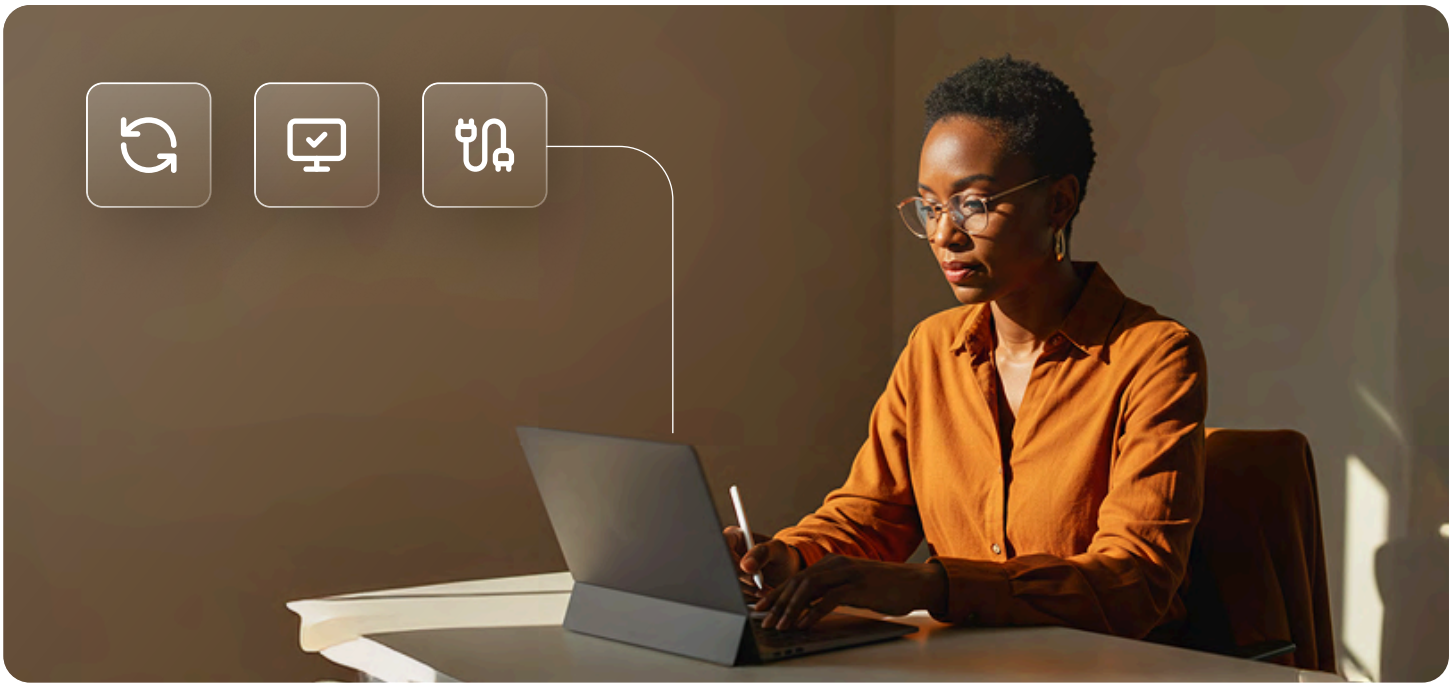
When applicable, this specialist ensures your financial data and accounting workflows transfer correctly, maintaining accuracy and compliance throughout the transition.

24/7 global support

88%
Chats answered in 2 minutes

93%
customer satisfaction score

Technology that *removes* friction



Implementation hub

Your personalized onboarding dashboard where you can track project progress, access video tutorials, complete assigned tasks, and find best practices. It's your step-by-step guide to getting started, and our team uses it to monitor your progress and keep everything on schedule.

View-only connection for Airbnb listings

Our industry-first innovation lets you import all your properties in just minutes while keeping existing connections intact. Configure, audit, and decide when to go live on your timeline — no forced overnight switches or business disruption.

Bulk reservations upload

Upload reservations quickly and accurately with our user-friendly interface. This 2-step process (fill out the reservations file → upload → watch reservations flow in automatically) ensures a seamless experience for both your team and your guests.

Self-service troubleshooting

Get clear explanations of Airbnb & Booking.com error messages so that you can detect and resolve potential sync issues independently and quickly.

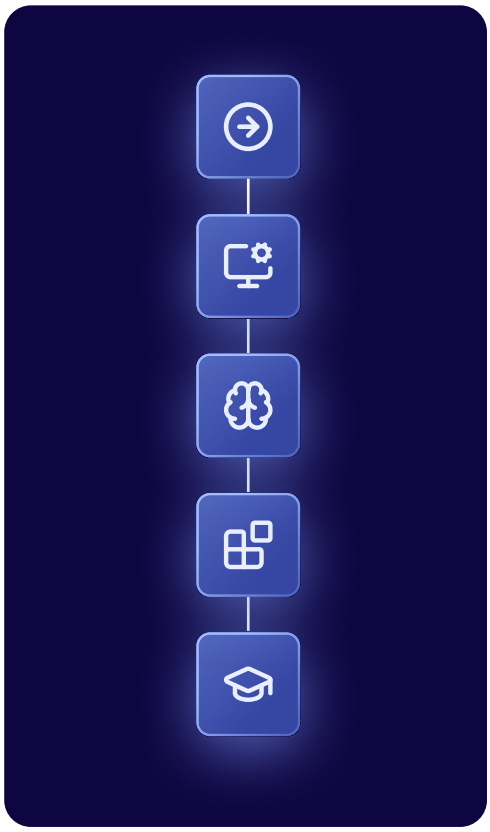
Seamless Vrbo onboarding

Streamlined connection process ensures your Vrbo listings transfer smoothly with minimal manual intervention required.

"Choosing Guesty was the right pick. Having the team fly out and work with our team at our offices was an awesome experience. It was the most incredible onboarding process we ever had."

Stay Texas Hospitality Group

The 5 *steps* of onboarding



Before you start: Set yourself up for *success*

Designate super users

Appoint one or more team members to act as your Guesty project leads. They should attend all training sessions and serve as the knowledge hub within your organization, helping the rest of the team transition to the new system.

Invest the time

You can help onboarding progress much faster by providing Guesty with necessary data quickly and committing time and resources. The duration of this process depends on our ability to extract data from your existing platform and your availability for training sessions.

Kickoff

30-60m

1

What to expect

- Meet your dedicated onboarding team
- Complete intake form to help us understand how you run your business
- Align on business objectives, expectations, and your tech stack
- Create your personalized onboarding roadmap
- Connect to the implementation hub and learn to use it

Who attends

Executive stakeholders and decision makers along with your designated super users who will be chiefly responsible for leveraging Guesty's capabilities.

Your outcome

Clear roadmap and set expectations. At the end of this session, everyone will be aligned on what success means for your business.

Setup

30-90m

2

What to expect

- Configure your Guesty account, automations, and operational workflows
- Import your reservations using the bulk upload tool (done on the call or as homework)
- Set up your account and perform initial system customization

Who attends

We recommend that executive stakeholders join to learn about our process, but we only require your Guesty super users to participate.

Your outcome

Guesty configured to facilitate optimal data transfer and match your business operations.

Training

30-90m

Multiple sessions

Financials (60-90m)

Come prepared with knowledge of your current rate management and OTA configurations as they pertain to items like taxes and fees. We'll review the platform's financial features and how they align with your existing setup.

Who attends

Executive stakeholders and decision makers along with your designated super users who will be chiefly responsible for leveraging Guesty's capabilities.

Guest experience (30-60m)

Review guest experience aspects of the platform and learn how to use them manually. Come equipped with current guest communication processes along with any improvements you'd like to make.

Who attends

Reservationists, guest communication agents, and guest-facing personnel

Guest experience automation (30-60m)

Revisit all guest experience features from the previous training, and learn how to automate the workflows, including pre-stay tools like the check-in form. Bring any pre-built copy that should be automated to guests, from booking to departure.

Who attends

Communication managers, marketing team, and others who benefit from learning the workflow engine

Operations (30-60m)

Cover the operational side of the business: task manager, setting up owner relationships, and managing CRM functions like the guestbook and guest relations. Create your cleaner profiles and establish how cleaning, inspection, and maintenance run within your business.

Who attends

Operations, cleaning supervisors, and other general managers

Reporting & analytics (30-60m)

Cover reporting and how to extract reservation reports, task reports, and analytics. Articulate current reporting needs and frequency by department.

Who attends

Revenue stakeholders, client relationships, reservation management, and operations teams

Add-on training (if applicable)

If you're onboarding additional solutions such as Accounting or Guesty PriceOptimizer, we'll provide specialized materials and extra sessions to ensure smooth adoption.

Connect & validate

30-60m

What to expect

- After final system testing, we will activate your listing distribution channels and connect your tech stack to the Guesty platform
- Q&A on onboarding status and optimization based on feedback
- Best practices validation to ensure everything works as expected before going live

Who attends

This session is required for all your super users — it's an all-hands-on-deck moment that requires someone familiar with login credentials for all OTAs and understanding of how to manage the 3rd party platforms you intend to integrate.

Your outcome

Live system with full functionality confirmed and validated.

Graduate

Ongoing

What to expect

- Review the status of the project's goals, current adoption, and process proposals
- Transition into post-launch support with 24/7 assistance available
- Performance optimization recommendations and future growth planning

Who attends

Executive stakeholders are strongly encouraged to attend and celebrate the successful completion of your transition to Guesty.

Your outcome

Successful partnership validation with a clear path for continued success and growth.

With Guesty, change management *becomes manageable.*

Let's dive into the onboarding services, technology, and processes that make it all happen.



Timeline

Typical 30-day timeline

Week 1

Kick-off call and initial setup configuration

Week 2

Training sessions covering all platform domains and workflow configuration

Week 3

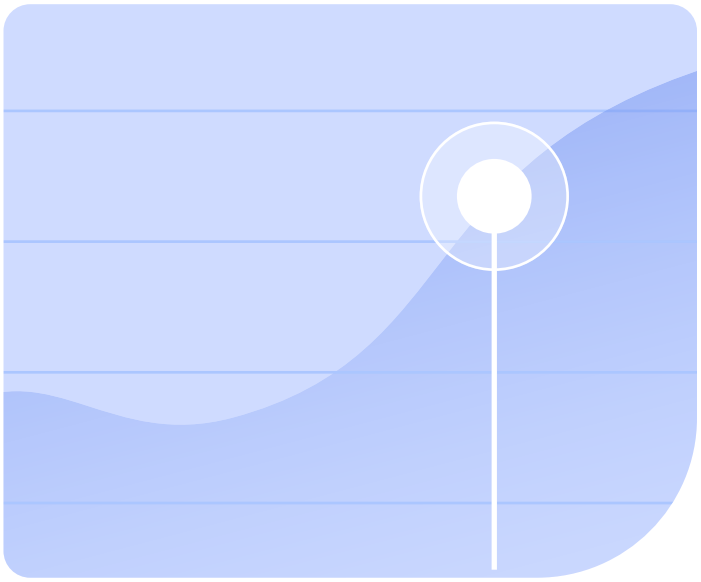
Final validation, OTA connections, and go-live preparation

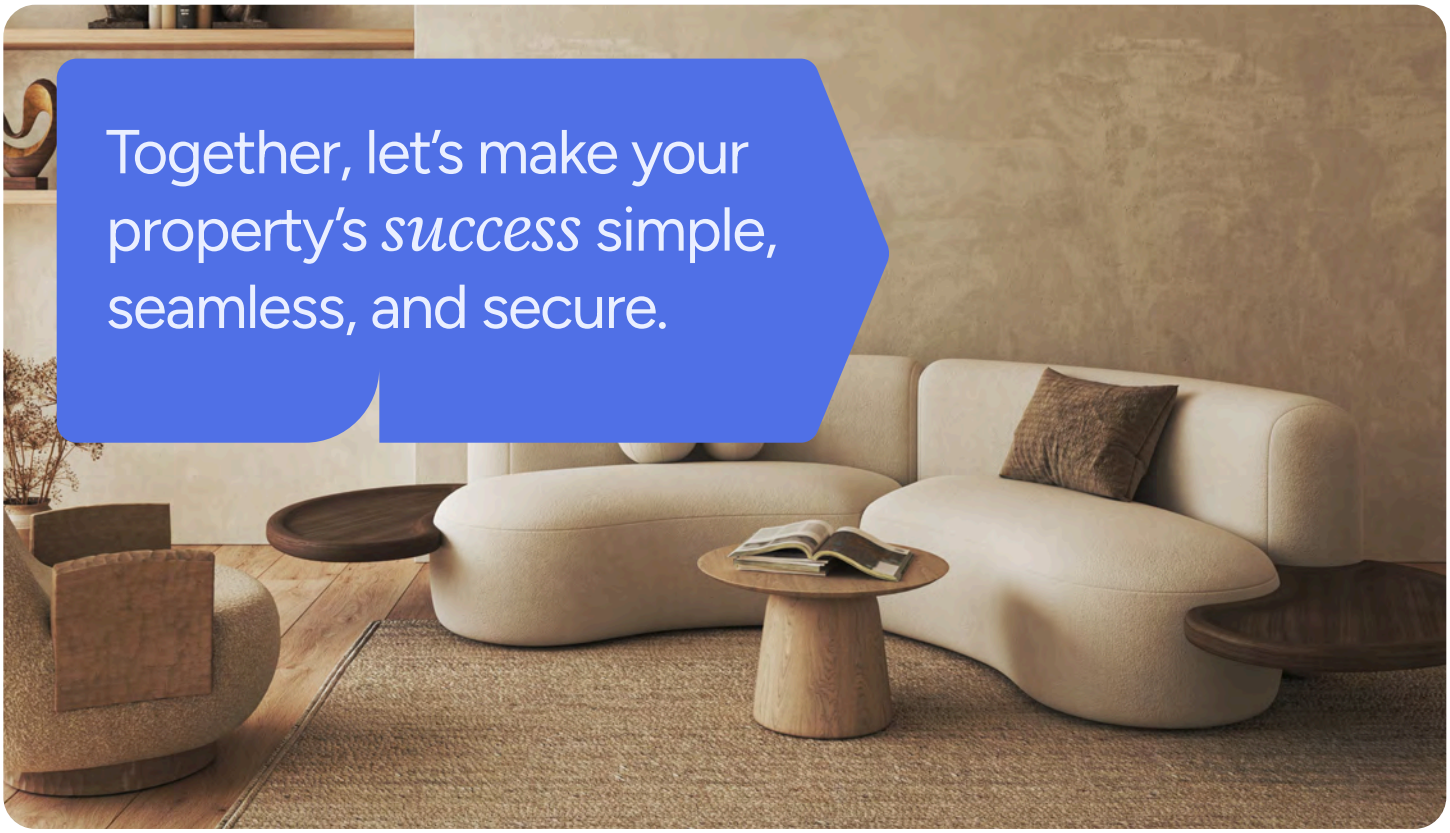
Week 4

System activation, validation, and graduation

Your role in success

Your partnership makes all the difference. The faster you can provide reservation files and system access, the quicker we can configure your account optimally. Consistent availability for training sessions and prompt completion of assigned tasks keeps the project moving efficiently. And open dialogue about challenges, questions, or changes helps us adapt the process to your needs in real time. When you bring the data and the time, we'll bring the expertise and support to make your transition seamless.





FAQs

1. How long does the onboarding take?

The process length depends on how quickly we can access data from your current PMS and the time you can dedicate. On average, onboarding takes approximately 30 days, with clear milestones and training sessions to keep everything on track.

2. Will my business be interrupted during the switch?

No. Guesty is the first PMS to allow migrations without disrupting day-to-day operations. You continue to run your business while configuring Guesty in parallel, then choose the go-live timing that works for you.

3. Do you protect my data during migration?

Yes. Data, listings, and workflows are transferred securely with no loss or corruption. Our view-only connection and bulk upload tools ensure your information is imported quickly and safely.

4. How do I know if the onboarding was successful?

Success is measured against the business objectives we define together in your kick-off call. We'll review goal achievement, platform adoption, and performance metrics during your graduation session to validate the partnership's value.

5. What about my accounting data and processes?

If you're adopting Guesty's Accounting add-on, our specialists provide tailored sessions and resources. We make sure financial data and workflows are transferred correctly, so your books stay accurate and operations continue smoothly.

6. What support is available after onboarding?

Even after graduation, your onboarding team remains available, and our global support team operates 24/7. With 88% of chats answered within two minutes and a 93% customer satisfaction score, you're always covered.

Life after *graduation*

Your ongoing success team

Technical program manager introduction (for applicable accounts)	Appoint one or more team members to act as your Guesty project leads. They should attend all training sessions and serve as the knowledge hub within your organization, helping the rest of the team transition to the new system.
Customer success manager continuity	Your original CSM remains your business relationship partner, maintaining the deep understanding of your goals and ensuring continued alignment with your success criteria.
24/7 support access	The same fast, reliable help structure continues with expert assistance available whenever you need it, maintaining the service level you experienced during onboarding.

Continuous learning & growth

Implementation hub resources	Continue accessing best practices, video tutorials, and guidance materials through the implementation hub as your business grows.
Platform updates and training	Stay current with Guesty's evolving capabilities through regular updates and training opportunities that help you maximize your investment.

Always-available resources

You'll have comprehensive documentation and tutorials at your fingertips through our knowledge center: **over 2,000 videos and articles** providing immediate answers to questions and guidance for new challenges. Expert assistance is **available 24/7**, so you're never stuck waiting for solutions to operational issues. And regular account reviews help optimize your setup and identify growth opportunities, making sure your Guesty platform continues delivering maximum value as your business evolves.

Ready to begin your *journey*?

Pre kick-off checklist

- [ ] Designate super users who will lead the project internally
- [ ] Gather current system data access credentials and permissions
- [ ] Prepare business objectives list and success criteria
- [ ] Schedule team availability for training sessions and key milestones
- [ ] Contact your customer success manager to schedule your kick-off call
- [ ] Begin your supported transition to better property management
- [ ] Access your implementation hub after kick-off to track progress and access resources

