



# The Hotelier's Guide to Starting Your Automation Journey

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Operational Guide for  
Hotel Owners and Executives



**ROBOSIZE ME**  
PROCESS AUTOMATION IN HOSPITALITY

# Introduction by Stephen Burke



After several decades working with technology and integrations in the hotel industry, one thing has always stood out to me: despite all the innovation, too much of hotel tech still gets in the way of the work it's meant to support. Over the years, I've seen time and again how automation—when done right—can help teams move faster, reduce manual tasks, and get back to the real work of running a hotel.

That's why I started RobosizeME. This company was built to solve a very specific problem I've seen across hundreds of properties: the need to bridge old systems with new tools, without launching a massive IT project every time. Automation shouldn't be disruptive. It should run quietly in the background, making daily work smoother, not harder.

This guide—*The Hotel Year's Guide to Starting Your Automation Journey*—breaks the process into seven simple, research-backed steps. Whether you're a GM, head of revenue, or operations lead, my hope is that this guide helps you take practical first steps toward freeing up your team's time and giving technology a supporting role, not a starring one.

**Let's get started.**



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# 1. Why This Guide Matters

Hospitality is an industry full of human interaction, but behind every guest experience lies a mountain of administrative work. From handling reservations to reconciling payments, many hotel operations rely on manual, repetitive tasks. These are often time-consuming, error-prone, and a poor use of your team's talent.

This guide is designed to show you that business process automation is not some high-tech leap reserved for the big chains. It's accessible, cost-effective, and most importantly, simple when you work with the right partner. The complexity of building and maintaining automations is handled by technology providers. Your job? Know your hotel, observe your processes, and identify what's slowing your team down.

**Let's walk through how you can do just that.**



# 2. What Automation Really Means for Hotels

At its core, automation means using technology to do the things your team currently does manually, but faster, with fewer mistakes, and without needing a coffee break. It doesn't require an overhaul of your entire IT stack, nor do you need to hire a team of developers. Instead, you work with a provider that already understands hotel operations and technology. Automations can work with APIs, UI automations, flat-files and multiple other methods. The goal is to set-up a digital worker that can unburden your team from repetitive tasks by any means necessary.

## Here's how it typically works:

- You observe and **identify processes that are repetitive**, rule-based, or inefficient.
- You **describe how those tasks work** and what systems are involved.
- Your **automation partner builds a digital worker** to do the task for you.
- The automation runs on schedule or when triggered, **quietly saving time, money, and stress.**

# 3. Where to Look: Signs Your Processes Need Automation

Use the following as a diagnostic tool, if any of these apply to your hotel, automation can help:

**Staff doing the same thing every day in Excel or a PMS** (e.g., exporting, copying, reconciling)

**Revenue being lost to errors** (e.g., incorrect rates, uncharged deposits, missed chargebacks)

**Guests calling to correct bookings or billing** (data accuracy issues)

**Teams overwhelmed by simple but high-volume tasks** (e.g., data entry, email confirmations)

**Manual handling of OTA reservations, billing, commissions, or reporting**

**Compliance tasks or reporting that consume days of work**

Automation can step in here and fix it, sometimes overnight.

# 4. Common Hotel Areas Ripe for Automation

## **Front Office & Guest Services**

- Automatically respond to online reviews with consistent tone
- Merge or deactivate duplicate guest profiles
- Apply routing instructions or update reservation details based on source

## **Reservations & Revenue Management**

- Collect and post deposits automatically
- Enrich OTA reservations with guest details and accurate routing
- Detect high-risk reservations that may result in no-shows
- Reconcile commissions weekly to avoid payment errors

## **Finance & Back Office**

- Reconcile credit card payments across systems (PMS, POS, Adyen, etc.)
- Automate invoice processing and approval routing
- Extract and deliver daily income audit and cashier adjustment reports



# 5. Getting Started:

## Your Role in the Automation Process

Here's what's expected from you as the hotelier:

**Know your workflows:**

What do people do every day? What takes a long time? What causes frustration?

**Spot inefficiencies:**

Are you copying data between systems? Repeating the same reports weekly?

**Map your systems:**

Which systems are involved (PMS, POS, CRM, payment gateways)?

**Prioritize pain points:**

Focus on processes that are high volume, time-consuming, or error-prone.

Once you've identified opportunities, a provider like Robosize.me will handle the rest, from building and testing the automation to hosting, monitoring, and supporting it.



# 6. Comprehensive Automation Readiness Checklist

## PROCESS IDENTIFICATION

- ☐ List repetitive, rule-based tasks
- ☐ Estimate frequency and time per task
- ☐ Identify steps involving data copying or double entry

	TASK	EST. TIME	COPYING
1.			
2.			
3.			
4.			

## TECHNICAL CONTEXT

- ☐ List all systems used (PMS, POS, CRM, accounting, etc.)
- ☐ Note how data is exchanged between systems today (if at all)
- ☐ Identify recurring reports or reconciliations you generate manually

	SYSTEMS	DATA EXCHANGE / API / MANUAL	REPORTS
1.			
2.			
3.			
4.			

## OPERATIONAL INSIGHT

- ☐ Ask staff: "What slows you down?"
- ☐ Flag tasks that are often skipped due to lack of time
- ☐ Note any recent errors that caused guest or revenue issues

STAFF	WHAT SLOWS YOU DOWN?	OFTEN SKIPPED?	DOUBLE WORK?

## PRIORITIZATION

- ☐ Rank automation ideas based on time saved, errors avoided, or revenue protected
- ☐ Start with one or two simple, clear processes

# 7. Your Next Steps:

## From Awareness to Action

### 1. Download this guide

Share it with key team members

### 2. Spend one hour reviewing your workflows

Identify at least three things you'd never want to do again.

### 3. Book a discovery session

with an automation partner.

### 4. Pilot one automation.

Measure the time saved or errors avoided.

### 5. Iterate

Expand automation across your organization, one process at a time.

Automation doesn't replace people. It empowers them. And it doesn't have to be complex, with the right help, it's as easy as identifying your pain points and letting the experts do the rest.

**Start small. Think big. Automate wisely.**

# Glossary of Automation Terms for Hoteliers

## **RPA (Robotic Process Automation)**

A software robot that mimics what a person does on a computer, like clicking buttons, copying data, or filling in forms, based on rules and specific instructions.

Think of it like: A digital intern who works 24/7, never makes typos, and doesn't take coffee breaks.

*Related to: Digital Worker, Agentic Automation.*

## **DIGITAL WORKER**

A virtual assistant designed to do one specific job repeatedly and accurately, such as sending invoices or updating reservations.

Think of it like: A hotel team member who only does one task, like reconciling credit cards, but does it perfectly, every time.

## **AI AGENT**

An automated system that uses logic or machine learning to make decisions and execute tasks.

Think of it like: A concierge who knows when to upsell a room or flag a suspicious reservation based on patterns.

Different from: RPA, which just follows instructions without "thinking."

## **AGENTIC AUTOMATION**

A form of automation where the software acts independently within set boundaries. It can execute tasks and learn and doesn't need to be given exact steps to follow like an RPA.

Think of it like: A self-driving car that can stay in its lane and make small adjustments without asking you.

Related to: AI Agents, both can act independently, but Agentic Automation often has more autonomy.

## **BPA (Business Process Automation)**

Using technology to automate a full business workflow from start to finish.

Think of it like: Automating the full reservation process from booking to billing, rather than just one task.

Larger than: RPA, which usually automates one task at a time.

## **DPA (Digital Process Automation)**

An advanced version of BPA that adds modern user interfaces and mobile tools.

Think of it like: BPA 2.0, more user-friendly, better for working across departments.

## **IPA (Intelligent Process Automation)**

Automation combined with AI, systems that don't just follow rules but make smart decisions. (IPA includes RPA + AI)

Think of it like: A smart assistant that not only checks reports but also decides when to alert the GM.

## **UNATTENDED AUTOMATION**

Automations that run on their own, without any human starting them.

Think of it like: Your night audit script that starts every night at 2am automatically.

## **ATTENDED AUTOMATION**

Automations that a human triggers, often as part of their daily work.

Think of it like: Pressing a button that fills in a form for you.

## **PROCESS MINING**

Analyzing system data to find patterns and inefficiencies in workflows.

Think of it like: A backstage pass to see how long and how often each team task really takes.

## **TASK MINING**

Tracking how users interact with systems to find repetitive actions that can be automated.

Think of it like: Watching screen recordings to spot what to automate.

## **WORKFLOW AUTOMATION**

Automating a sequence of steps in a specific process.

Example: Automatically confirming bookings, collecting deposits, and updating profiles.

## **OCR (Optical Character Recognition)**

Tech that reads text from scanned images or PDFs and turns it into usable data.

Think of it like: Giving a computer the ability to "read" a printed invoice and type it into your system.

## **API (Application Programming Interface)**

A digital connection that lets two software systems talk to each other.

Think of it like: A telephone line between your PMS and your CRM.]

## **BOT**

Short for “robot,” a bot is a software application that runs automated tasks.

Think of it like: A mini program that works behind the scenes to perform a specific job.

## **UI AUTOMATION (User Interface)**

Automation that uses screen elements like buttons and fields to perform tasks, just like a human.

Think of it like: A robot moving the mouse and clicking buttons for you.

## **API AUTOMATION**

Using an API (Application Programming Interface) to automate actions between two or more systems.

Think of it like: A digital handshake between systems — your PMS sends data to your accounting software without anyone needing to press a button.

Compared to UI Automation: API automation is direct and behind-the-scenes; UI automation mimics what a human does on screen.

## **MACHINE LEARNING (ML)**

A type of AI that gets smarter over time as it processes more data.

Think of it like: A staff member who learns guest preferences and improves upselling without being told.

## **NATURAL LANGUAGE PROCESSING (NLP)**

AI that understands and responds to human language.

Think of it like: Chatbots that respond to guest questions with natural, conversational answers.

## **DATA RECONCILIATION**

Comparing records across systems to find and fix mismatches.

Example: Matching OTA invoices to PMS bookings.

## **EXCEPTION HANDLING**

What happens when something unexpected occurs in an automated process.

Think of it like: A front desk staff stepping in when the system can't find a reservation match.

## **RPA-AS-A-SERVICE (RPAaaS)**

A model where you don't buy the software, you rent the service and the robots are managed for you.

Think of it like: Outsourcing your automation the same way you'd outsource laundry or IT support.

## **RULE-BASED AUTOMATION**

Automation that follows a fixed set of instructions. Most RPAs are rules based automations.

Think of it like: “If booking source = Expedia, then apply payment routing.”

## **EVENT-TRIGGERED AUTOMATION**

Automation that starts when something specific happens (like a new reservation).

Example: A bot that updates the guest profile as soon as the booking is confirmed.

## **LOW-CODE / NO-CODE AUTOMATION**

Automation tools that don't require programming knowledge.

Think of it like: Drag-and-drop tools that let you build workflows, like creating a Zapier recipe or Mailchimp campaign.

## **FLAT FILES**

A simple file that stores data in plain text, usually organized in rows and columns.

Think of it like: A spreadsheet without formulas or formatting, just the raw data. Examples: CSV, TXT, or log files from your PMS or POS.

## **INTEGRATION**

Connecting different systems to share data automatically.

Think of it like: Linking your PMS and your accounting software so guest charges appear instantly in both.

# About RobosizeME

Too busy to automate? That's exactly why we exist.

RobosizeME helps hotels eliminate manual, time-consuming tasks without adding to their workload.

Founded by hospitality and tech veterans, our mission is simple: take automation off your to-do list and put it into actionfast.

No consultants. No IT teams. No disruption. Just results.

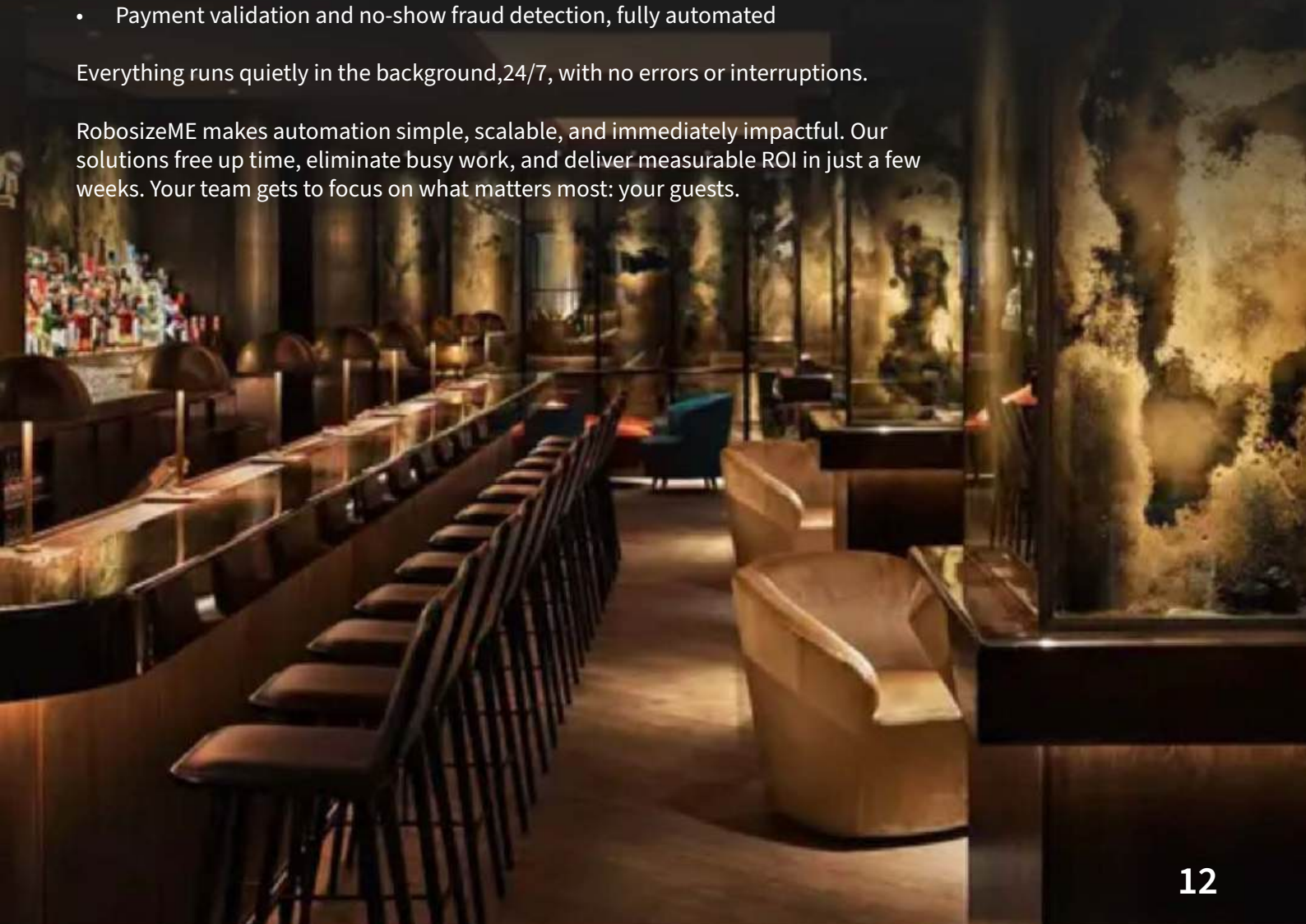
Our digital workers connect directly with your existing systems, including PMS, POS, CRS, CRM, and finance platforms, and start delivering value in under two weeks.

Trusted by Radisson, Louvre Hotels, Kempinski, and Global Hotel Alliance, we've saved thousands of hours by automating:

- OTA reservation updates, completed before your team starts the day
- Commission and voucher reconciliations, without spreadsheets
- Rate code maintenance, saving 72 workdays a month for Louvre Hotels Group — the equivalent of three full-time roles
- Daily pick-up reports, guest profile cleanups, and error monitoring
- Payment validation and no-show fraud detection, fully automated

Everything runs quietly in the background, 24/7, with no errors or interruptions.

RobosizeME makes automation simple, scalable, and immediately impactful. Our solutions free up time, eliminate busy work, and deliver measurable ROI in just a few weeks. Your team gets to focus on what matters most: your guests.





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# Contact Information

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