

# Venue Booking Software Checklist

## 40 questions to ask before choosing a venue, event space or event booking system

A practical checklist for venues, event spaces, function centres, clubs, hotels, caterers and event teams reviewing their booking process, enquiry workflow or event management software.

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### Is your venue booking process ready to scale?

Venue bookings involve more than managing a calendar. Enquiries, quotes, room availability, menus, deposits, event details, customer communication and operations all need to work together.

When these details are spread across emails, spreadsheets and separate systems, it becomes harder to respond quickly, avoid mistakes and deliver a consistent customer experience.

Use this checklist to review your current process and compare venue booking software options with more confidence.

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### How to use this checklist

For each question, mark:

**Yes** — This is handled well today

**Partially** — This exists, but still requires manual work

**No** — This is missing or handled outside the system

At the end, review your answers to identify where your current process may be slowing your team down or creating risk.

You can use this checklist when:

- Reviewing your current booking process
- Comparing venue booking software
- Preparing for a demo with software providers
- Aligning sales, event and operations teams
- Building a business case for a new system

## 1. Enquiry management

A strong venue booking process starts with how new enquiries are captured, tracked and followed up.

| Checklist questions                                                                                            | Yes | Partial | No |
|----------------------------------------------------------------------------------------------------------------|-----|---------|----|
| 1. Can enquiries from your website, phone, email or sales team be captured in one central place?               |     |         |    |
| 2. Can your team see the status of each enquiry, such as new, contacted, quoted, tentative, confirmed or lost? |     |         |    |
| 3. Can enquiry details be converted into a quote or booking without re-entering the same information?          |     |         |    |
| 4. Can your team track follow-up dates, notes and communication history against each enquiry?                  |     |         |    |

### Why this matters:

If enquiries are managed across inboxes, spreadsheets and personal notes, opportunities can easily be missed. A central enquiry workflow helps your team respond faster and gives management better visibility over the sales pipeline.

## 2. Venue diary, rooms and availability

Your venue diary needs to show more than whether a room is free.

| Checklist questions                                                                         | Yes | Partial | No |
|---------------------------------------------------------------------------------------------|-----|---------|----|
| 5. Can your team view live availability across rooms, spaces, areas or venues?              |     |         |    |
| 6. Can the system handle tentative, confirmed, cancelled and completed bookings clearly?    |     |         |    |
| 7. Can your team avoid double bookings or conflicting use of rooms, equipment or resources? |     |         |    |
| 8. Can multiple event spaces be booked together under one event or customer record?         |     |         |    |

### Why this matters:

A basic calendar may show bookings, but venues often need more detail. The system should help your team understand room availability, event status, booking value and operational impact at a glance.

### 3. Packages, menus and pricing

Venue bookings often involve more than room hire. Packages, catering, add-ons and custom pricing need to be easy to manage.

| Checklist questions                                                                                           | Yes | Partial | No |
|---------------------------------------------------------------------------------------------------------------|-----|---------|----|
| 9. Can the system manage venue hire, food and beverage packages, menus, add-ons and optional extras?          |     |         |    |
| 10. Can pricing be adjusted based on customer type, package, event date, guest count or special requirements? |     |         |    |
| 11. Can quotes include both standard packages and custom line items?                                          |     |         |    |
| 12. Can your team update menus, pricing and package details without needing technical help?                   |     |         |    |

#### Why this matters:

If package details and pricing are handled manually, quoting becomes slower and less consistent. A strong system should help your team create accurate quotes while still allowing flexibility for custom events.

## 4. Quotes and proposals

The quote process is often where venues win or lose business.

| Checklist questions                                                                                       | Yes | Partial | No |
|-----------------------------------------------------------------------------------------------------------|-----|---------|----|
| 13. Can your team create professional quotes or proposals directly from the enquiry or booking?           |     |         |    |
| 14. Can proposals include event details, packages, menus, venue hire, optional extras, terms and pricing? |     |         |    |
| 15. Can customers review, approve or sign proposals online?                                               |     |         |    |
| 16. Can your team track quote status, revisions and customer approval history?                            |     |         |    |

### Why this matters:

Manual quote creation can slow down response times and increase the risk of errors. A good system should make it easy to send clear, professional and accurate proposals quickly.

## 5. Contracts, deposits and payments

Once a customer is ready to proceed, the system should help secure the booking and reduce admin.

| Checklist questions                                                                               | Yes | Partial | No |
|---------------------------------------------------------------------------------------------------|-----|---------|----|
| 17. Can the system collect deposits, part-payments or final balances against a booking?           |     |         |    |
| 18. Can contracts, terms or booking agreements be attached to the event workflow?                 |     |         |    |
| 19. Can your team see payment status and outstanding balances without checking a separate system? |     |         |    |
| 20. Can customer payment activity be linked back to the booking, quote or invoice?                |     |         |    |

### Why this matters:

Payments and booking confirmations are key control points. When these are disconnected from the event record, teams may need to manually check whether a booking is confirmed, paid or still at risk.

## 6. Event details, BEOs and run sheets

Once the booking is confirmed, the focus shifts from sales to delivery.

| Checklist questions                                                                                                         | Yes | Partial | No |
|-----------------------------------------------------------------------------------------------------------------------------|-----|---------|----|
| 21. Can the system capture event details such as guest count, timings, room layout, dietary requirements and special notes? |     |         |    |
| 22. Can it generate BEOs, function sheets, run sheets or operational documents from the booking?                            |     |         |    |
| 23. Can updates to the booking flow through to the relevant event documents?                                                |     |         |    |
| 24. Can different teams access the details they need without relying on forwarded emails or separate files?                 |     |         |    |

### Why this matters:

The more manual the handover from sales to operations, the greater the chance of missed details. A central event record helps everyone work from the same source of truth.

## 7. Operations and team communication

Venue software should support the teams responsible for delivering the event, not only the people taking the booking.

| Checklist questions                                                                                           | Yes | Partial | No |
|---------------------------------------------------------------------------------------------------------------|-----|---------|----|
| 25. Can sales, event managers, kitchen, operations and finance teams access the information relevant to them? |     |         |    |
| 26. Can the system help manage internal notes, tasks or operational updates related to the event?             |     |         |    |
| 27. Can event changes be tracked so teams know what has been updated?                                         |     |         |    |
| 28. Can the system reduce reliance on spreadsheets, printed documents and manual re-entry?                    |     |         |    |

### Why this matters:

A booking system should reduce internal back-and-forth. When all teams can see the right information, the venue can operate with fewer mistakes and less manual coordination.

## 8. Customer experience

The customer experience starts long before the event day.

| Checklist questions                                                                                          | Yes | Partial | No |
|--------------------------------------------------------------------------------------------------------------|-----|---------|----|
| 29. Can customers receive clear, professional communication throughout the enquiry and booking process?      |     |         |    |
| 30. Can customers review quote details, event information or payment requirements easily?                    |     |         |    |
| 31. Can your team respond quickly to changes in guest count, menu selections or event requirements?          |     |         |    |
| 32. Can the system help create a smoother experience from enquiry through to confirmation and final payment? |     |         |    |

### Why this matters:

Customers judge a venue not only by the event itself, but by how easy it is to plan and book. A smoother booking process can improve trust, reduce confusion and help your team look more professional.

## 9. Reporting and visibility

Management needs clear visibility over bookings, revenue and performance.

| Checklist questions                                                                                  | Yes | Partial | No |
|------------------------------------------------------------------------------------------------------|-----|---------|----|
| 33. Can management report on enquiries, conversion rates, confirmed bookings and lost opportunities? |     |         |    |
| 34. Can the system show upcoming revenue, deposits collected and outstanding balances?               |     |         |    |
| 35. Can reports be filtered by date, venue, room, event type, customer or sales status?              |     |         |    |
| 36. Can your team export useful reports without building spreadsheets manually?                      |     |         |    |

### Why this matters:

Without clear reporting, it is difficult to know which enquiries are converting, which spaces are underused and where revenue is coming from. Good reporting helps venues make better sales and operational decisions.

## 10. Implementation, support and scalability

The right software needs to fit your team, not just your feature list.

| Checklist questions                                                                                  | Yes | Partial | No |
|------------------------------------------------------------------------------------------------------|-----|---------|----|
| 37. Can the provider support onboarding, setup, training and data migration?                         |     |         |    |
| 38. Can the system scale as your venue adds more users, locations, event types or booking workflows? |     |         |    |
| 39. Can the provider explain what is included, what is optional and what may require custom work?    |     |         |    |
| 40. Can your team realistically adopt the system without creating unnecessary complexity?            |     |         |    |

### Why this matters:

Software selection is not only about features. Implementation, support, training and long-term fit are just as important. The best system is one your team can actually use well.

## Scorecard

Use this simple scorecard to review your current process or compare software options. For each checklist item:

|                    |                 |
|--------------------|-----------------|
| <b>Yes =</b>       | <b>2 points</b> |
| <b>Partially =</b> | <b>1 point</b>  |
| <b>No =</b>        | <b>0 points</b> |

Maximum score: **80 points**

### **65–80 points: Strong process**

Your current process is likely well-structured. Focus on improving efficiency, reporting and customer experience.

### **40–64 points: Room for improvement**

Your process may work, but probably relies on manual steps, duplicate entry or disconnected systems. This is a good time to review where your team is losing time.

### **0–39 points: High admin or operational risk**

Your team may be relying heavily on spreadsheets, inboxes or manual coordination. A dedicated venue booking system could help improve visibility, consistency and control.

## Common signs you may have outgrown your current process

You may need to review your venue booking workflow if:

- Enquiries are tracked in multiple inboxes or spreadsheets
- Staff are unsure whether a booking is tentative or confirmed
- Quotes are manually built from old documents or templates
- Event details are copied between systems
- Deposits and balances need to be checked separately
- BEOs or function sheets are created manually
- Sales and operations teams are working from different information
- Management cannot easily report on pipeline, bookings or revenue
- Customers regularly ask for clarification on quotes, payments or event details
- Your team is spending too much time on admin instead of selling and delivering events

## Questions to ask during a software demo

When reviewing venue booking software, ask the provider to show you:

1. How a new enquiry is captured and followed up
2. How an enquiry becomes a quote or proposal
3. How venue availability and room bookings are managed
4. How packages, menus, add-ons and pricing are added
5. How a customer approves a quote or confirms a booking
6. How event changes are communicated internally
7. How deposits, payments and balances are tracked
8. How BEOs, function sheets or operational documents are created
9. How management reports on enquiries, bookings and revenue
10. How onboarding, setup and training are handled

Tip: Ask providers to walk through a real example that matches your venue's workflow, rather than only showing a generic demo.

## Final checklist summary

Before choosing a venue booking system, make sure it can support the full booking lifecycle:

- Enquiry capture
- Sales workflow
- Venue availability
- Quotes and proposals
- Packages and pricing
- Contracts and approvals
- Deposits and payments
- Event details and BEOs
- Operations handover
- Reporting and management visibility
- Onboarding and support

The right system should help your team reduce manual admin, improve visibility and deliver a smoother booking experience for customers.

## About Flex

Flex helps venues, event spaces, function centres, caterers and event teams manage enquiries, quotes, bookings, menus, payments and event operations in one system.

With Flex, teams can manage the workflow from initial enquiry through to proposal, booking confirmation, payment, event details and operational handover.

If you are reviewing your current venue booking process, we can walk through your workflow and show how Flex may be able to support your team.

## Want to review your venue booking process?

Book a demo with Flex and see how your team can manage enquiries, quotes, bookings, catering, payments and event operations in one connected system.

### Book a Demo

<https://www.flexcateringhq.com/book-demo>

### Website

<https://www.flexcateringhq.com>

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