



A WHITEPAPER
FROM MITEL

CONNECTED HOSPITALITY
INVESTMENT GUIDE

Connected Communications, Consistent Service

A United States Hospitality Perspective

A Mitel investment guide for hospitality IT
leaders in the United States



Research data: Frost & Sullivan, 2026 · Companion to the Connected Hospitality vBook

US hospitality IT knows where the problems are.

The gap is between knowing and acting at the right pace.

US hospitality is operating under sustained pressure: labor shortages continue to affect front-line staffing, rising operational costs are compressing margins, and guests expect a level of digital service consistency that most properties are not yet equipped to deliver. Communications infrastructure sits at the center of all three: it determines whether staff coordination is fast or slow, whether guest data reaches the right person at the right moment, and whether the operation can add new capability without introducing new complexity.

Frost & Sullivan research across four markets, France, Germany, the UK, and the US, commissioned by Mitel, shows US operators carrying the highest rate of outdated infrastructure of any market in the study. The challenges are well understood. What varies is the sequencing of investment decisions and the confidence that a modernization program can be executed without adding operational disruption on top of operational pressure.

This paper sets out five specific investment decisions, grounded in that data, that address those priorities in the right order. Each one builds on the last. Taken together, they form a modernization sequence that moves from foundational infrastructure through workflow automation, compliance, AI enablement, and partner selection.

Five decisions. One connected sequence.

1. **Modernize the infrastructure layer first.** AI, automation, and self-service tools all underdeliver when built on a communications platform that was not designed to support them.
2. **Automate the workflows where manual friction is most visible to guests.** Every manual handoff in a guest-facing workflow adds latency, reduces consistency, and increases the risk of service failure.
3. **Build federal compliance into platform selection, not post-deployment configuration.** Kari's Law and Ray Baum's Act are legal requirements, and the cost of remediation after the fact typically exceeds what a proper evaluation would cost upfront.
4. **Frame AI as a staff enablement investment.** US operators are the least likely of any market to see AI as a cost-reduction tool and positioning it that way consistently underperforms in procurement conversations.
5. **Lead partner evaluation with reliability and deployment flexibility.** Both are must-haves for most US operators, at rates higher than any other market studied.

Each decision is explored in full in the pages that follow, with the signal from the data and the specific action it points to.



Modernize the infrastructure layer before building anything on top of it

53%

of US operators cite outdated IT and communications systems as a significant challenge, the highest rate in the study

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US hospitality IT has a foundational infrastructure problem. 53% of operators cite outdated IT and communications systems as a significant challenge, fifteen points above the study average. This is not a tool overload issue or an integration gap problem. AI features, workflow automation, and self-service tools all underdeliver when they are deployed on top of a communications layer that was not designed to support them, representing a compounding drag on operational performance and the returns from any subsequent technology investment.

THE ACTION

Before evaluating new capability additions, assess the infrastructure layer they would run on. Ask specifically: does your current communications platform support open API integration with your PMS and operations tools? Does it maintain service continuity during network disruptions? If the answer to either question is no or only partially, capability investment on top of it will compound the problem rather than resolve it, because every new tool inherits the reliability and integration constraints of the underlying foundation. Modernizing the infrastructure is the prerequisite, not the alternative, to the broader program.

MITEL ADDRESSES THIS BY

Mitel's hybrid architecture is designed exactly to address this constraint through on-premises reliability for critical communications and cloud capabilities that extend the platform without creating dependency on network availability.

With the right infrastructure foundation in place, the immediate return on investment is realized by closing the workflow automation gaps that are costing US properties time, consistency, and guest satisfaction every day.



Automate the workflows where manual friction is most visible to guests

49%

of US operators report automation gaps tied to workflow events, nine points above the study average

THE SIGNAL

49% of US operators report a lack of communication automation tied to workflow events. Every manual step in a guest-facing workflow adds latency to service delivery and creates a point of failure. The housekeeping update that requires a phone call to the front desk, the support ticket that waits for someone to relay it to the right team, the maintenance alert that sits in an inbox: each represents a moment where communication latency directly translates into a poorer guest experience. Food and beverage and incident response are the two functions where US operators report the sharpest workflow challenges and where automation can deliver the most tangible results.

THE ACTION

Map the workflows where manual coordination adds the most latency to service delivery at your property. For each, identify the specific event that should trigger an automated notification or routing action but currently doesn't. That gap is your automation investment case, defined in operational rather than technical terms, because the business outcome of closing it is measurable: faster response times, fewer service failures, and reduced front-line coordination burden that frees staff for the guest interactions that genuinely require a person. Solutions that target those specific manual steps will deliver a clearer ROI than broad platform upgrades without a defined workflow target.

MITEL ADDRESSES THIS BY

Mitel's automated task routing, real-time status notifications, and NLP-driven support ticket handling eliminate the manual coordination steps that create service latency in food and beverage, housekeeping, and incident response workflows.

Automating workflows creates a new data environment, one where guest interactions, service requests, and operational events are logged and traceable. That environment carries compliance obligations that need to be built into the platform architecture before they become a remediation problem.



Build Kari's Law and Ray Baum's Act compliance into platform selection, not deployment configuration

60%

of US operators cite strongest compliance with industry regulations as a must-have in partner selection

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Kari's Law and Ray Baum's Act establish federal requirements for multi-line telephone systems covering direct emergency dialing from any extension and dispatchable location data for 911 calls. Operators who discover compliance gaps after platform selection typically face a choice between costly remediation and a phased workaround that leaves the property exposed. The financial and reputational consequences of a compliance failure in an emergency scenario makes this a higher-stakes decisions in the evaluation process.

THE ACTION

Before shortlisting any communications platform, require a written statement of Kari's Law and Ray Baum's Act compliance covering direct outward dialing from every extension, automatic location identification for emergency calls, and on-site security notification. If a vendor cannot provide this at the platform level, the compliance work falls to your team, and that expense belongs in the total cost of ownership calculation because it often changes the evaluation outcome. Platforms that treat compliance as a configuration task rather than an architectural commitment shift risk onto the operator.

MITEL ADDRESSES THIS BY

Mitel's platform is built with Kari's Law and Ray Baum's Act compliance as architecture-level commitments. Emergency dialing, dispatchable location data, and on-site security notification are platform capabilities, not post-deployment configuration tasks.

With infrastructure modernized, workflows automated, and compliance secured, the foundation exists to deploy AI in a way that delivers measurable outcomes rather than surface-level capability.

4

Position AI as a staff enablement tool, not a cost reduction mechanism

14%

of US operators expect AI to reduce operating costs, the lowest rate of any market in the study

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What stands out most is the absence of expected cost-savings benefits. Only 14% expect AI to reduce operating costs, eleven points below the study average and the lowest rate of any market. Only 14% expect AI to reduce operating costs, eleven points below the study average and the lowest rate of any market. US operators see AI primarily as a tool for improving information management, work quality, and customer experience, all above the benchmark. For buyers, the key question is not how much AI can reduce costs, but how effectively it can improve the quality and consistency of service delivery.

THE ACTION

Build your AI investment case around staff-enablement outcomes: faster access to guest preference and history data at the point of service, reduced error rates in high-stakes workflows such as allergen management and incident escalation, and improved routing so that guest requests reach the right person without manual relay. These outcomes are measurable and directly connected to service quality. The strongest business cases therefore start with service quality and workforce effectiveness, with financial efficiencies emerging as a downstream benefit rather than the primary objective.

MITEL ADDRESSES THIS BY

Mitel applies AI to staff enablement first: real-time guest preference alerts, smart request routing, multilingual interaction support, and automated ticket handling. Staff spend less time on manual coordination and more time on the guest interactions that require a person.

The effectiveness of these investment decisions ultimately depends on the partner chosen to implement them. Selecting a provider with the right mix of capabilities, industry experience, and long-term alignment is therefore critical.



Lead with reliability and deployment flexibility in your partner evaluation

62%

of US operators cite highest reliability as a must-have, the highest rate of any market in the study

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US operators have the clearest partner evaluation hierarchy of any market in this study, with reliability (62%) and deployment flexibility (62%) the top priorities. This reflects the operational reality of US multi-property estates: mixed network environments, branded and independent properties under one management structure, and a strong commercial requirement for infrastructure that continues to function regardless of upstream conditions. An outage on a cloud provider's network should not become a service failure at the property or corporate locations, and US IT leaders are selecting partners who can guarantee that.

THE ACTION

Structure your partner evaluation with reliability as the initial screen, not an assumed baseline. Ask specifically how the platform behaves during a network disruption: which functions continue to operate, which are degraded, and which fail. Require a documented answer with reference deployments, not a general availability guarantee, because the difference between 99.9% and 99.99% uptime represents hours of potential disruption across a year. Next, evaluate deployment flexibility against your actual estate: how does the platform handle multiple PMS environments, different property configurations, and varying network infrastructure within a single managed environment?

MITEL ADDRESSES THIS BY

Mitel's on-premises call control continues to operate independently of cloud availability. Hybrid deployment supports mixed property estates with varying PMS environments and network infrastructure, managed centrally without requiring a single standardized configuration. time on the guest interactions that require a person.

Infrastructure, automation, compliance, AI, and partner selection: Five decisions that build on each other.

US hospitality IT leaders who work through these decisions sequentially, rather than in parallel or in response to a specific pressure point, tend to see lower deployment disruption, faster adoption, and service consistency improvements that hold. The sequencing is not incidental. Each decision creates the conditions for the next one to work.

Ready to map this to your properties?

Mitel works with hospitality IT teams across the US to assess infrastructure gaps, map compliance requirements, and build a modernization plan that maintains operational continuity throughout.

Visit mitel.com/solutions/industry/hospitality to speak with a Mitel hospitality specialist.

Data Source: [Frost and Sullivan Connected Hospitality vBook](#)

