



The Corporate Housing **Planning Toolkit**

Everything you need to know
before choosing a partner.



Practical tools to define your needs, align stakeholders
and make a more informed housing program decision.

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How to use the toolkit

Decide what works for you.

Work through the tools in order or use the individual resources most relevant to where you are in the process.

1. Define the need — Housing Needs Intake

Worksheet: Start with what you know. Capture who you are housing, where they need to be, how long they are likely to stay and what matters most. Use the worksheet to align stakeholders, distinguish firm requirements from areas of flexibility and identify what could change.

2. Understand the full picture — Cost and

Complexity Inventory: Look beyond the quoted housing rate. Identify fees, change-related costs, internal administrative work and visibility gaps that can affect both spend and the time required to manage the program.

3. Compare providers consistently — Provider

Comparison Scorecard: Evaluate providers using the same operational, service and accountability criteria. Capture evidence, commitments and follow-up questions to create a clearer view of strengths, gaps and tradeoffs.

4. Pressure-test the decision — Red Flags

Checklist: Use this final review to surface potential gaps in service, coverage, flexibility, communication, reporting and accountability before they create additional cost or work.

Still defining what to look for?

The Corporate Housing Buyer's Guide is a companion to this toolkit. It provides practical guidance on evaluating provider service models, coverage, flexibility, reporting, guest support and accountability.

A shared starting point.

You do not need every answer before you begin. The goal is to create a shared starting point, make tradeoffs visible and ask better questions before a housing need becomes urgent.

Have an active housing need?

Talk with National about the right solution for your people, timeline, and budget.



Housing Needs Intake Worksheet

Start with what you know.
Plan for what might change.



Finding the right housing starts with more than a move-in date. Use this worksheet to capture the details that matter, identify what is flexible and flag what could change.

Program and contacts

Request owner: _____

Company or program: _____

Program type, select all that apply: ☐ Relocation ☐ Project-based assignment ☐ Group housing
☐ Intern program ☐ Training ☐ Extended business travel
☐ Other: _____

Final approver: _____

Decision deadline: _____

Location and timing

Primary market: _____

Worksite or destination: _____

Target move-in date: _____

Estimated length of stay, example 90 days or 3 months: _____

How flexible are the dates: ☐ Fixed ☐ Some flexibility ☐ Highly flexible ☐ Unknown

Travelers and housing

Number of Travelers: _____

Number of units: _____

Preferred unit type, select all that apply: ☐ Studio ☐ 1 bedroom ☐ 2 bedroom ☐ 3+ bedroom
☐ Unsure ☐ Other: _____

Traveler needs

Family members: ☐ Yes ☐ No ☐ Unknown details: _____

Pets: ☐ Yes ☐ No ☐ Unknown details: _____

Accessibility requirements: _____

Parking: ☐ Required ☐ Not needed ☐ Unknown Number of spaces or other details: _____

Dedicated workspace: ☐ Required ☐ Preferred ☐ Not needed ☐ Unknown

Other considerations: _____

Commute and location

Preferred maximum commute, example 30 minutes: _____

Transportation, select all that apply: ☐ Walking ☐ Public transportation ☐ Driving ☐ Biking ☐ Shuttle
☐ Rideshare ☐ Flexible ☐ Other: _____

Location priorities, select all that apply: ☐ Near worksite ☐ Near transit ☐ Near airport
☐ Family-friendly ☐ Dining or retail ☐ Recreation or green space ☐ Other: _____

Budget and guidelines

Target rate: _____

Rate basis: ☐ Nightly ☐ Monthly ☐ Either ☐ Unknown

Approved range or flexibility: _____

Rate or program guidelines: _____

Required lease flexibility: _____

Billing and reporting

Billing contact: _____

Billing, select all that apply: ☐ Consolidated ☐ By traveler ☐ By location
☐ By department or cost center ☐ Unknown
☐ Other: _____

Reporting needs, select all that apply: ☐ Occupancy ☐ Spend ☐ Upcoming expirations
☐ Traveler or unit details ☐ Program performance
☐ Unknown ☐ Other: _____

Support expectations

Support needed, select all that apply: ☐ Booking only ☐ End-to-end program management

☐ Traveler support ☐ Property or maintenance coordination

☐ Reporting and program oversight ☐ Unknown

☐ Other: _____

What could change

What could change, select all that apply: ☐ Dates ☐ Headcount ☐ Location or worksite ☐ Unit mix

☐ Traveler needs ☐ Budget ☐ Nothing anticipated

☐ Unknown ☐ Other considerations: _____

Closing review

Where will travelers work: _____

What is the realistic move-in window and headcount range: _____

Which traveler needs and commute requirements are essential: _____

What budget and lease guidelines apply: _____

How should billing and reporting work: _____

What is most likely to change: _____

The goal is not to have every answer. A strong housing partner can help uncover gaps and weigh tradeoffs.

Provider Comparison Scorecard

Use the three questions in each category to give one overall rating from 1 to 5. Record evidence and follow-up questions. Ask providers for examples, data, service commitments or references.

1 Limited | 2 Below expectations | 3 Meets expectations | 4 Strong | 5 Exceptional

Evaluation criteria	Provider A Name: _____	Provider B Name: _____	Provider C Name: _____
1. Coverage and Market Depth Can they support your priority markets? Can they source in hard-to-place locations? Can they offer choices beyond existing inventory?	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____
2. Local Expertise Can they advise on neighborhoods, commutes and amenities? How are properties and local partners assessed? Are recommendations tailored to employee needs?	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____
3. Speed and Responsiveness How quickly are requests acknowledged and options provided? How are urgent requests and escalations handled? Is there a dedicated contact and measurable service levels?	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____
4. Post-Move-In Guest Support Who supports employees after move-in? Is assistance available after hours? How are property issues coordinated and resolved?	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____
5. Change Management How are extensions, early departures and date changes managed? Can they respond to changing headcounts and locations? Are risks, fees and potential issues communicated early?	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____	Score: ____ / 5 Evidence / notes: _____

Continue on page 2 for the remaining criteria, total scores and final discussion.

Additional notes: _____

Scores are a decision aid, not the decision itself.



Continue with the same providers in the same columns. Complete all ten ratings before calculating a total.

1 Limited | 2 Below expectations | 3 Meets expectations | 4 Strong | 5 Exceptional

Evaluation criteria	Provider A Name: _____	Provider B Name: _____	Provider C Name: _____
6. Billing and Reporting Can billing be consolidated or customized? Are invoices clear and easy to reconcile? Can reporting be tailored and discrepancies resolved promptly?	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____
7. Flexibility Can they support different stays, unit types and housing needs? Can workflows fit your approval and billing requirements? Will they tailor their approach to complex requests?	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____
8. Program Design and Implementation Is there a clear onboarding plan, timeline and owner? How will requests, approvals and escalations work? How will billing, reporting and service expectations be set up?	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____
9. Scalability Can they support sudden headcount increases or decreases? Can they manage simultaneous needs across markets? Can they support small, large, seasonal and project programs?	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____
10. Overall Accountability Who owns the program and overall experience? Do they communicate before your team needs to follow up? How are performance and improvement measured and managed?	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____	Score: _____ / 5 Evidence / notes: _____
TOTAL — all ten categories	_____ / 50	_____ / 50	_____ / 50

Add the five ratings on each page. Leave the total blank until all ten categories are scored. All categories carry equal weight.

Final discussion

Who makes your team's job easier?

Who handles change and the unexpected most effectively?

Who demonstrates the clearest ownership and partnership?

Scores are a decision aid, not the decision itself.



Corporate Housing Red Flags Checklist

Ten signs to watch for before you book.

CHECKLIST



A good housing decision goes beyond the quoted rate. Use this checklist to surface details that can create extra cost, extra work or a weaker employee experience later.

Checklist instruction: Check any item that requires follow-up.

Check	Red Flag	What to look for
☐	The proposal leads with a low rate but does not explain total cost or service.	Look beyond rate to fees, inclusions, service levels, and total program cost.
☐	What is included is unclear.	Confirm exactly what is included, optional, excluded, or charged separately.
☐	Location is treated as a pin on a map.	Evaluate commute, neighborhood, safety, amenities, and proximity to daily needs.
☐	The plan assumes nothing will change.	Ask how the provider handles extensions, cancellations, relocations, and changing demand.
☐	Support stops at move-in.	Confirm who supports the guest throughout the stay and after-hours.
☐	Billing is fragmented.	Look for consolidated invoicing, clear cost allocation, and fewer manual reconciliations.
☐	Program visibility is limited.	Ensure reporting provides visibility into spend, usage, status, and trends.
☐	The provider cannot demonstrate scalability.	Ask how they support volume increases, new markets, and simultaneous placements.
☐	Local expertise is missing.	Look for market knowledge that improves property selection and solves local challenges.
☐	No one clearly owns the process.	Confirm one accountable point of contact coordinates the experience end to end.

Notes: _____

Want to go deeper? Read [Five Mistakes to Avoid When Booking Corporate Housing](#).



Cost and Complexity Inventory

What sits beyond the housing rate?



The quoted housing rate is only one part of a program's total cost. Fees, changes, administrative work and limited visibility can affect both spend and the time required to manage the program.

Use this inventory to identify what is included, where information is missing and which questions should be addressed during planning or provider evaluation.

Direct stay costs

Cost item	Included	Visibility
Housing rate	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable
Utilities and Wi-Fi	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable
Cleaning or housekeeping	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable
Deposits and pet fees	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable
Parking	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable
Furniture or household items	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable
Taxes and other fees	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Clear ☐ Partial ☐ Unknown ☐ Not applicable

Questions, gaps or actions identified: _____

Changes and exceptions

Change or exception	Terms clear	Cost impact understood
Extensions or date changes	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable
Early departures	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable
Cancellations	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable
Unit changes	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable
Unused nights	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable
Last-minute sourcing	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable
Emergency or after-hours support	☐ Yes ☐ No ☐ Unknown ☐ Not applicable	☐ Yes ☐ Partial ☐ No ☐ Not applicable

Questions, gaps or actions identified: _____

Internal administrative effort

Activity	Effort	Who manages it
Sourcing and comparing options	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	
Coordinating multiple providers	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	
Processing expense reports	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	
Reconciling invoices	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	
Tracking arrivals, departures and extensions	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	
Resolving employee or guest issues	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	
Compiling reports across providers	☐ Low ☐ Moderate ☐ High ☐ Unknown ☐ Not applicable	

Questions, gaps or actions identified: _____

Program visibility and risk

Question	Response
Can we see total housing spend?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable
Are rates, fees and included services documented?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable
Are cancellation and extension terms visible?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable
Can we identify duplicate, unused or out-of-policy bookings?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable
Is ownership of issue resolution clear?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable
Can we anticipate departures, extensions and changes?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable
Do reports answer stakeholder questions?	☐ Yes ☐ Partial ☐ No ☐ Unknown ☐ Not applicable

Questions, gaps or actions identified: _____

What did the inventory reveal?

Where are costs difficult to see? _____

Which activities consume the most internal time? _____

Which costs, responsibilities or terms should be clarified? _____

Use the findings to strengthen housing requirements, provider questions and evaluation criteria. No, Partial or Unknown responses, along with Moderate or High effort ratings, may highlight areas for follow-up.

See how these costs can accumulate in [What a Self-Managed Housing Solution Can Really Cost](#).

This inventory is a planning resource. Costs and program requirements vary by market, stay type, timing and organizational policy.

A final thought.

A better housing experience starts with a better plan.

The strongest programs create clarity around priorities, costs, responsibilities, and the experience they're designed to deliver.

They also make it easier to adapt as needs change — without adding unnecessary complexity for your team or the people you support.

Home. Wherever you are.®

Ready to strengthen your housing program?

Talk with a National housing specialist about a solution built around your people, priorities, and business needs.





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