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Services

Annual Optima MOT: Configuration & Process Review

Implement improvements, promote rostering best practice and ensure data integrity.

The foundation of any effective rostering system lies in its configuration. Our Annual Optima Configuration & Process Reviews ensure your Optima platform is fully fine-tuned to promote best practices. The review provides assurance that your rostering system is functioning at its best to support your workforce and organisational needs.

What are the key benefits?

Identify areas for improvement

An analysis of current processes helps identify enhancements for efficiencies across teams.

Align with best practices

A review of critical configurations and settings, ensures your system is aligned to promote rostering best practice.
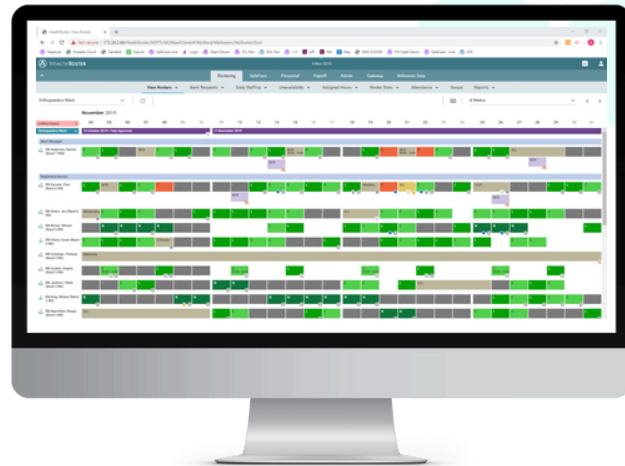
Ensure data integrity

The review supports easy tracking of KPIs, ensuring data is up-to-date and accurate, for confident reporting.

By auditing global and local rostering rules, we help your organisation achieve the full benefits of the Optima system, promoting rostering best practice.

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What more does the Annual Optima Configuration & Process Review offer you?

- **Optimised Organisational Structure & Data Integrity** – Ensures core reference data, including organisational structure, grade structure, and establishment, is accurate and aligned with business needs, improving workforce planning and reporting.

- **Improved Role Task Alignment** – Confirms system responsibilities are correctly assigned, ensuring accountability, efficiency and compliance with best practices.

- **Enhanced Rostering Compliance & Policy Alignment** – Validates rostering rule settings to ensure they align with organisational policies, reducing rule breakages and improving fairness in scheduling.

> "A positive start to what looks set to be an exciting journey - I appreciated having time with someone with experience working with other clients facing similar challenges... feeling assured that we are in safe hands!"
>
> **Seashell Trust**

- **More Efficient Roster Configuration** – Assesses unit and template configurations to enhance scheduling efficiency, ensure optimal use of skills and minimise rule breaches.

- **Streamlined Leave & Absence Management** – Evaluates unavailability reasons and leave management processes to ensure alignment with sickness and absence policies, improving workforce availability tracking.

- **Increased Automation & Compliance in Roster Creation** – Reviews auto-roster settings and compliance measures to improve scheduling accuracy, reduce manual workload and enhance policy adherence.

- **Optimised User Roles & System Utilisation** – Identifies gaps in user roles and profiles, ensuring appropriate access levels and highlighting unused features for potential efficiency gains.

Find out more

Get in touch with your account manager to learn more about the Annual Optima & Process Configuration Review.

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