



# Choosing the right workforce management software in social care

A purchasing checklist for leaders

# Choosing the right workforce platform for your organisation is critical for your success

**In Social Care, your workforce is your most important asset.** Delivering great quality care is at the heart of what you do. The core function of your workforce systems is to enable your frontline teams to do what they do best – provide great quality care. With payroll costs the biggest part of any provider's cost base, it is the first place to look to drive efficiencies that directly impact the bottom line. It has never been more critical to have a better handle on your workforce operations.

**Social Care providers have unique challenges not faced by other industries.** Providers typically have large workforces with high turnover rates versus the national average. They must manage dynamic shift patterns that come with complex pay rules. They have to be good at balancing skills, experience and preferences of their frontline teams in a way that other industries do not. Underpinning it all is a robust regulatory framework where small gaps can lead to outsized consequences from the CQC, CI, RQIA, CIW and Home Office. When things go wrong, the financial, reputational impact is large and in the worst case, service users can come to harm.

**Get the right workforce systems in place and you can create an infrastructure that drives quality, scale and cost efficiencies.** Reduced admin burden from frontline staff will improve satisfaction and retention; seamless data integrations will drive operational efficiencies in back office functions; a unified analytics infrastructure means that leaders can make decisions based on reality.

This is a guide for leaders within Social Care to use to support purchasing decisions for workforce platforms. It outlines the key risk of making a bad decision and includes a checklist that you can use to support your decision making.



# All leaders in Social Care have experienced a failed software project

Every leader in social care will have first hand experience of the challenges of implementing new software. Usually signs will appear during the buying process which, in hindsight, will be obvious red flags. Failed software projects can have extreme consequences for the continued success of the organisation and generate cultural headwinds that can take years to recover from.

*"We've been in implementation with our rostering provider for the last 18 months. There's so much broken glass across the organisation and we don't have the energy to enact anymore change."*

Procurement Director,  
50 Site Care Home Group

*"We were oversold during the process. When it came to using the system in real life we had months of problems calculating payroll and ended up having to revert to spreadsheets. We've had to hire two people just to stay on top of this."*

Owner,  
5 Site Residential Care  
Group

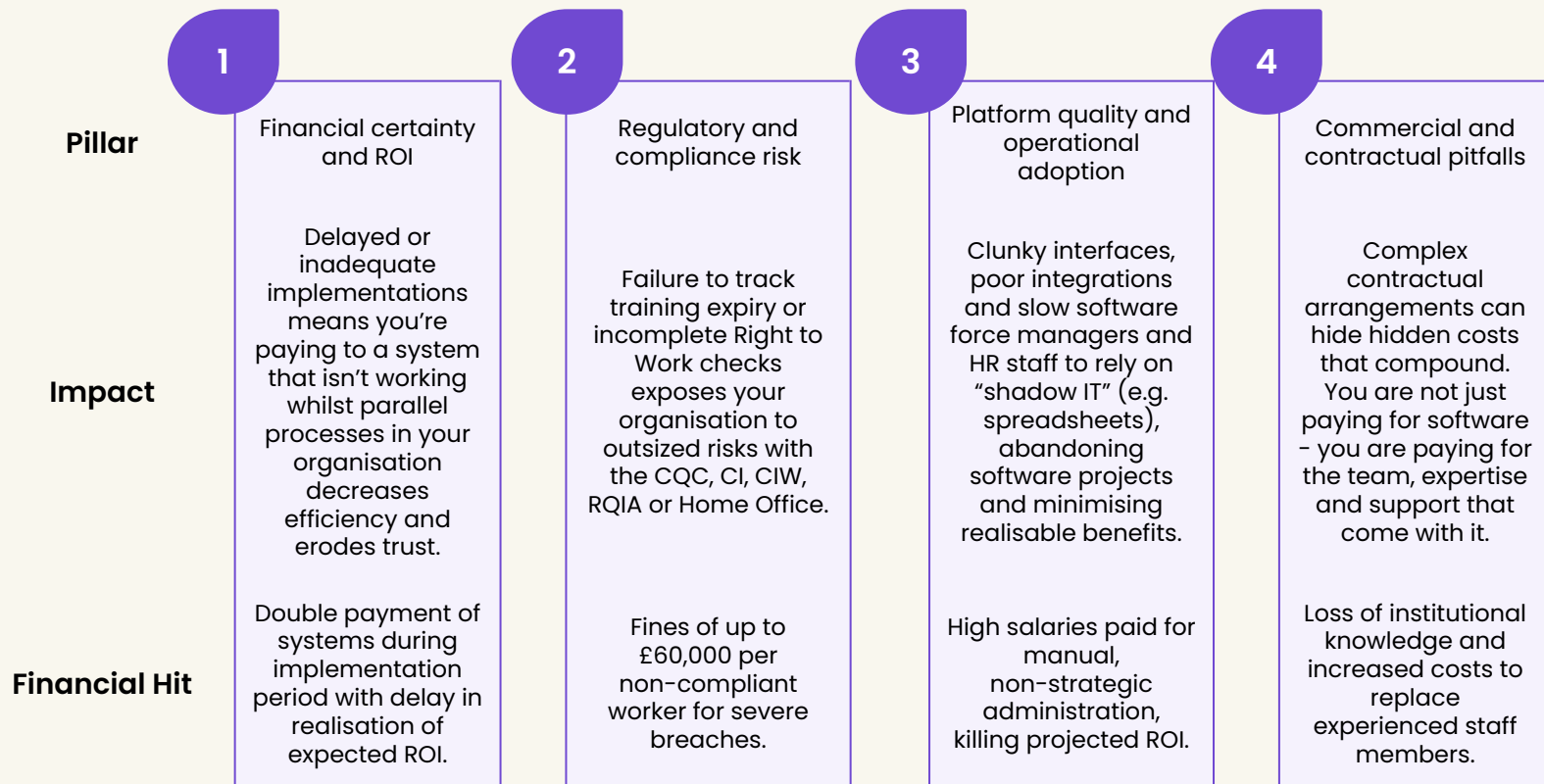
*"The frontline staff and managers hate the system. We spend so much time at head office trying to get them to use it but it feels like we're pushing water up a hill. I think most of them are still just using spreadsheets."*

Chief Executive,  
24 Site Supported Living  
Provider

*"We spent a lot of money and time building integrations with our current systems but they don't really work. We don't have confidence in the data we're getting out the other side so still ask managers to complete weekly hours returns to understand our staffing usage."*

Chief Financial Officer,  
78 Site Care Home Group

# The 4 Pillars of Purchasing Due Diligence when Considering Workforce Software



# Purchasing Checklist

Use this checklist to make sure you're asking the right questions throughout the purchasing process. Interrogate the vendor on these questions and score their response out of 5. Multiply the *Weight* by the *Score* to arrive at your *Weighted Score*. Add your *Weighted Scores* up to give a final score with which to mark potential vendors.

Key Area	Notes	Weight	Score	Weighted Score (W x S)
Pillar 1: Financial Certainty and ROI				
Total Cost of Ownership	Clear, simple and predictable pricing structure that persists through duration of contract	5		
Automated Payroll Accuracy	Guaranteed, real-time data flow with your payroll system	5		
Agency / Overtime Reduction Logic	Inbuilt agency management systems with agency tiering and permissions. Controls against non-essential overtime usage.	3		
Case Studies and References	Vendor happy to provide detailed case studies and references from existing customers	3		
Pillar 2: Regulatory & Compliance Risk				
Hard coded rostering compliance	System automatically enforces UK Working Time Directive limits	3		
Automated visa compliance	System automatically flags expired right to work checks and prevents non-compliant working	5		
Compliance exception alerts	System alerts relevant users to absent or expired compliance or training documents Ability to hard block users from the roster with critical compliance failures	5		
Instant CQC audit readiness	Single report compiles all employment, training and shift history on demand	4		
Data security & GDPR compliance	Data hosting confirmed in UK / EU Validated security certifications provided; ISO 27001 is the gold standard	4		
Flexible in built reporting functionality	Easy to use and insightful reporting functionality that supports all manager and admin users with	5		

# Purchasing Checklist cont.

Key Area	Notes	Weight	Score	Weighted Score (W x S)
<b>Pillar 3: Platform quality and operational adoption</b>				
Mobile first user experience	Frontline staff can perform all critical tasks on a simple mobile app	4		
Modern UX design throughout	Experience for managers and administrators should be clean, modern and simple. Minimal / No duplication of data entry required	5		
Manager time savings	Demonstrated automation reduces managerial admin time	3		
Sector specific experience	Vendor has unique and dedicated experience serving social care customers versus a multi-sector solution	4		
Integration readiness	Ability to integrate with adjacent systems (e.g. ATS) via API. No or low charges for integrations with existing solutions.	3		
Visible roadmap for future development	Vendor is open about future product road map, takes feedback from you on feature development ideas and actions them quickly	2		
Rapid pace of product development	Vendor has at least a daily release schedule for updating features and fixes.	3		
Connectivity to vendor team	Multiple touchpoints with people from the vendor's team beyond the sales lead. This should include contacts from engineering, finance, implementation, account management and executive lead.	3		
Platform performance and scalability	Platform architecture is reliable and supports scale. Check how quickly pages load and whether error messages appear during demo.	4		

# Purchasing Checklist cont.

Key Area	Notes	Weight	Score	Weighted Score (W x S)
<b>Pillar 4: Commercial and contractual pitfalls</b>				
Implementation cost transparency	No or Low fixed fee implementation costs including data migration, training and go-live support	3		
Implementation support structure	Guaranteed 'Intensive Care' period of at least 90 days post go live with dedicated single point of contact. In person training offered for end users as part of implementation and on ongoing basis	5		
Charges for bespoke work or configuration	Reasonable custom development work, including integrations, are covered under standard set up fees	3		
Ongoing customer support	Contractually guaranteed response time for critical issues with 24/7/365 support Dedicated ongoing account management from single, named point of contact	3		
Annual price increases	Contract specifies no annual price increases. If annual contract price increases, should come with a cap on subscription fees, tied to CPI/RPI and capped at 3%	3		
Contract term and renewal clause	No automatic multi-year renewal; reasonable notice period for termination	2		
Data portability and exit cost	Contract guarantees data can be fully extracted and handed over free of charge	1		
Vendor financial stability	Vendor willing to provide evidence of financial stability as a long term partner	3		
<b>Total (Max Score = 455)</b>				

# Want to know more?

By implementing a workforce management solution like Florence, you'll gain a unified view of your team, unlock reliable and actionable insights, and drive team satisfaction and retention.

Whether Florence is the right solution for you or you're looking for support on understanding how to navigate the workforce management landscape in social care, we've helped more than 2,000 care organisations take control of their workforce systems and drive impact for their organisation.

We would welcome the opportunity to speak with you.

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