ELMO

Choosing a Workforce Management Software

A step-by-step guide for Australian organisations that run on shifts



It starts before the first demo.

Every roster commits labour cost and creates compliance risk, often before anyone can see either. Whether you run stores, venues, care services, or sites, the right workforce management software brings that cost and risk into view while you still have time to change it.

Start by getting clear on how work is planned, changed, approved, recorded and paid. Then you'll know exactly what to ask vendors. This guide walks you through eight steps, from mapping your current process to signing with confidence.

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STEP 1

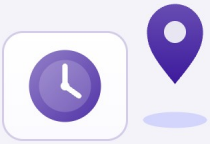
Map your workforce

A workforce map shows *who works where, when and on what terms*, including roles, sites, pay rules, qualifications and approvers. Gaps in this information carry straight into a new system, so getting it right now saves rework and pay errors later.

WORKFORCE MAPPING CHECKLIST



Define each staff group's agreed hours and award, agreement or above-award terms.



List all locations, opening hours, remote options and time zones.



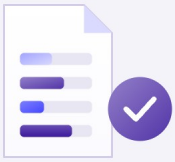
Identify periods of high demand, holidays, campaigns and quiet seasons.



Map the required roles, skills, licences and certificates needed for each shift.



Record when people can work and when they prefer to work.



Name who creates rosters, who approves them and who checks timesheets.

Tip: Before you start, ask around for an existing map. Payroll, HR, rostering teams or a previous system project may already have a list of employees, sites, pay rules and approvers. If nothing exists, start small. Pick one site or team and list its people, hours, roles and approvers first. Once that picture is accurate, you can extend it to the rest of the business.

STEP 2

2 Map the workflow

A workflow map shows *how work moves*. It traces the process from planning to pay, including who does each task, which systems they use and where data is re-keyed or checked by hand. Mapping out your workflow helps to uncover friction points and existing challenges between rostering and payroll. Your workflow could look something like this:

WORKFLOW MAP: FROM ROSTER TO PAY

1. **Build and publish rosters**
   Who builds it? Which tool?
2. **Request availability and changes**
   How do staff ask? Who approves?
3. **Integrate leave on roster**
   Is leave entered twice?
4. **Approve shift swaps**
   Where is the approval recorded?
5. **Record actual hours**
   Digital timesheet or paper? Who checks it?
6. **Review exceptions before payroll**
   What gets checked by hand?
7. **Document corrections**
   Where are fixes logged after pay?
8. **Generate reports**
   Who exports what, and where does it go?

Tip: List every stage from start to finish in a simple flow chart. Flag any point where data is re-keyed, emailed, or checked by hand. These are your most likely sources of error.

STEP 3

3 Engage stakeholders early

Managers, rostering staff, payroll and frontline employees often hit the same problems from different angles. Engaging with them early shows where the process breaks down and which issues appear across groups. It also helps people feel involved, which makes adoption easier later.

Use these prompts in a conversation or a short survey.

Managers

Store, venue, site or unit

- How many hours a week do you spend building or fixing rosters?
- How often do last-minute changes or absences disrupt your team?
- What information do you wish you could see at a glance?
- Which measure would make the biggest difference to your week: unfilled shifts, late changes or roster time?

Rostering staff

- Which awards, rules, allowances or qualifications do you check by hand before publishing a roster?
- How do you find out about changes after a roster is published, and who tells you?
- Which rosters or templates do you rebuild each cycle?
- Which measure would best show you that the new system is working day to day?

Payroll officers

- How do you check that timesheets match rostered hours before a pay run?
- Which pay rules do you correct most often after a pay run?
- Which reports or audit trails take the longest to produce?
- Which measure would most help you trust the pay run: timesheet corrections or payroll exceptions?

Frontline employees

- How do you find out your shifts, and how much notice do you usually get?
- How easy is it to swap a shift or request leave?
- How do you check your hours and pay are right?
- What would help most: more notice, easier swaps or fewer pay queries?

Tip: Surveys are quicker, but a 30-minute check-in, online or in person, gives you more context. Ask each stakeholder to bring one real example, such as a roster they built or a timesheet they corrected. When walking through the workflow map with stakeholders, ask them where they use more than one system or spreadsheet for the same information, and which workarounds have become normal.

STEP 4

4 Define what success looks like

What do you want workforce management software to do for you? What is your ideal end state? Think beyond rostering and consider where your biggest gains could come from.

Clear goals prevent you from investing in a platform that solves the wrong problem. Linking goals to revenue, labour cost and retention shows leadership how workforce software affects the bottom line, not just admin time.

Use these outcomes to spark ideas.

REVENUE AND SERVICE

Grow revenue and protect service levels

Have the right people on shift when customers, guests or clients need them most

METRIC

Unfilled shifts in peak periods

COST AND TIME

Protect labour margins

Match staffing to demand so you pay for the hours you need

METRIC

Overtime hours and labour cost as a % of revenue

Save manager time

Less time on spreadsheets, swaps and manual approvals

METRIC

Hours spent building rosters and on admin

PEOPLE AND RISK

Keep your people

Fair, predictable rosters that reduce burnout and turnover

METRIC

Staff turnover and roster change requests

Stay compliant

Apply award rules, breaks and qualification requirements as rosters are built without chasing paperwork

METRIC

Timesheet corrections and payroll exceptions

Identify problems early

Spot overtime, absence and attendance trends before they get costly

METRIC

Late roster changes and absence rates

Tip: Turn each goal into something you can measure, such as “cut roster build time by three hours a week.” You’ll use these same goals to set your baselines in Step 5.

STEP 5

5 Choose what to measure

Turn each goal into a number you can track. For every metric, agree on a definition, a baseline, an owner and a review date. The baseline shows where you're starting from, so you can justify the investment to leadership and measure progress after go-live.

You don't need all ten metrics. Start with the three or four that link most closely to your goals in Step 4.

Metric	How to define it	Baseline source	Owner
Time spent building rosters	Hours per week on roster build and fixes, per manager	Manager survey or timesheets for roster tasks	Operations manager
Unfilled shifts	Unfilled shifts ÷ total shifts rostered × 100	Roster reports, split by peak and quiet periods	Rostering lead
Late roster changes	Changes made within your notice period ÷ total changes	Roster change log	Rostering lead
Timesheet corrections	Timesheets changed after a pay run closes ÷ total timesheets	Payroll correction records	Payroll manager
Payroll exceptions	Pay runs needing manual adjustment ÷ total pay runs	Payroll exception reports	Payroll manager
Approval turnaround	Average hours from request to approval	Approval or workflow records	HR manager
Staff self-service adoption	Staff using self-service ÷ total staff	System login or usage data	HR systems lead
Manager admin time	Hours per week on spreadsheets, swaps and manual approvals	Manager survey or time sampling	HR business partner
Overtime and labour cost	Overtime hours and labour cost ÷ revenue × 100	Payroll and sales reports	Finance business partner
Staff turnover	Leavers in the period ÷ average headcount × 100	HR records	HR manager

Tip: Set a review date of when you'll compare results to the baseline, such as after one pay cycle and again at three months. Don't judge results after one pay cycle, but check for any data problems and urgent issues. After three months, compare against your baseline using similar periods, such as busy season against busy season. Add a 12-month review for turnover and labour cost, as these take longer to show a trend.

STEP 6

6 Identify the features you need

The right software handles your busiest periods and your everyday rules, and keeps up as your organisation grows. Use this checklist to test each vendor against the situations you face.

Requirement	What to look out for
Rules, cost and rostering	☐ Can you configure the awards and agreements that apply to each team, site or employee group? ☐ Can managers see cost, breaches and coverage gaps before they publish a roster? ☐ Does the cost update live as shifts are added, moved or extended, including penalty rates, overtime and breaks? ☐ Can it check the person rostered has the skills, licences or qualifications the shift needs?
Australian award and agreement updates	☐ Who maintains the award library: the vendor, a third party or your team? ☐ How are changes applied, such as Annual Wage Review increases from the first full pay period on or after 1 July? ☐ Can it handle the rules that cause the most errors, such as minimum engagement, penalty rates, broken shifts and higher duties? ☐ Can you set enterprise agreement and above-award rules alongside the award?
Time and records	☐ Can the platform record actual hours, approvals, changes and exceptions? ☐ Is every change to a roster or timesheet recorded, including who made it and why? *Note: Fair Work requires employers to keep accurate time and wages records for seven years, and those records must be accessible and legible.*

STEP 6 CONTINUED

Vendor checklist

Requirement	What to look out for
Payroll connections	☐ Which system is the source of truth for rosters, actual hours and leave? ☐ How are errors found before a pay run, who fixes them and how are corrections tracked?
Employee self-service	☐ Can staff view shifts, submit availability, request leave or swap shifts where permitted? ☐ Can managers review those requests and keep a clear record of their decisions?
Fatigue and safe scheduling	☐ Can the system flag short turnarounds, long runs of shifts, repeated late nights or short-notice changes? *The goal is to help managers spot a risky pattern early, not to hand safety decisions to software.*
Privacy and access	☐ What data is collected, who can access it? ☐ Where is the data hosted and how long is it kept? *Workforce systems hold personal information, including availability, leave and time records.*
Implementation and local support	☐ Who configures your awards and rules during implementation? ☐ Is support based in Australia, and who's your named contact after go-live?
Ease of use	☐ Is it easy to use on mobile devices for employees? ☐ Can employees see shifts, timesheets, leave, payslips and messages in one app? Is it simple enough for someone who only logs in once a week?

Tip: Bring your scenarios during the demo. Ask the vendor to show what happens at each step: what staff see, what managers approve, what HR and payroll can review, and what happens when a shift changes at the last minute.

STEP 7

7 Plan your implementation

A platform isn't finished at go-live. It becomes valuable when people use it confidently and you can learn from the information it creates. Plan for that stage as carefully as you plan the launch, and give each decision below a named owner and a date.

Implementation plan example

Awards, classifications, qualifications and rules

Confirm which awards, agreements, classifications and allowances will be configured for each team. Name who owns future changes, such as a pay rise, a new enterprise agreement or a new site.

Owner: **Date:**

Data migration

Decide what moves across, such as employee records, leave balances, availability and roster templates. Clean the data first, then check a sample against the source records.

Owner: **Date:**

Source of truth

Decide which system holds the official record for employees, rosters, time, leave and payroll.

Owner: **Date:**

Training and communication

Train staff, managers, payroll and HR on the parts of the system they'll use. Tell everyone what's changing, when it happens, and how to request a roster change or leave under the new process.

Owner: **Date:**

Support and escalation

Set up clear support channels, such as a help desk or a named internal contact. Agree on response targets for urgent issues, such as a missed shift or a wrong pay rate, and who to escalate to if they aren't met.

Owner: **Date:**

Post-go-live reviews

Schedule reviews at set intervals, such as two weeks, one pay cycle and three months. Track adoption, the number of exceptions and payroll accuracy, and use the findings to adjust settings and training.

Owner: **Date:**

Tip: Ask vendors to walk you through their post-go-live support before signing. Request a sample implementation plan, the adoption and exception reports they provide, and the named contact who will support you after launch.

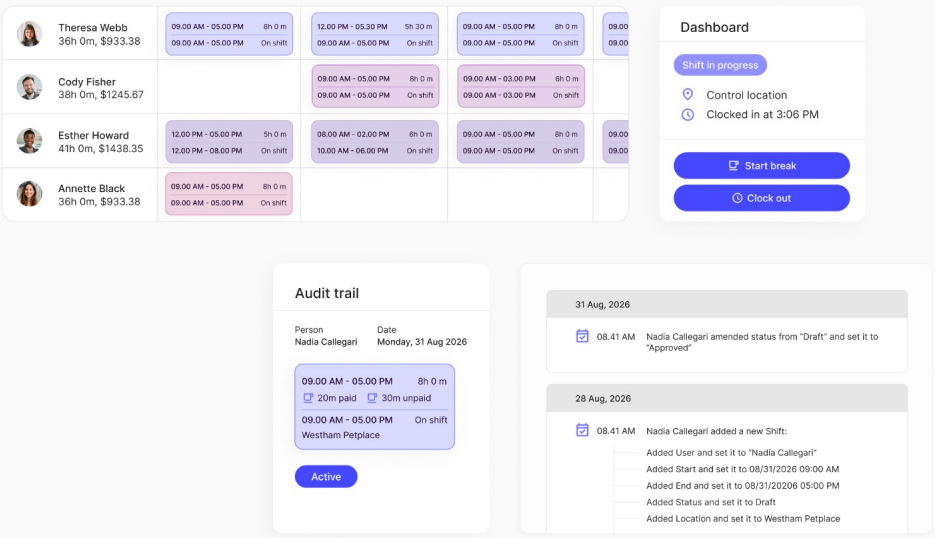
STEP 8

8 Decision checklist

You've mapped your workforce, your workflow and your goals, and you've shortlisted your options. Before you sign, use this checklist to confirm your processes, rules, people and plan are ready.

Item	Status	Owner	Notes
☐ Have we documented our current roster and time process?			
☐ Have we identified the awards and agreements that apply to each team?			
☐ Have we seen what a shift will cost, and any award breaches, before the roster is published?			
☐ Do we know who maintains award updates after go-live?			
☐ Has the vendor demonstrated our busiest real-world scenario, such as peak trading, a short-staffed weekend or a last-minute sick call?			
☐ Can managers, staff, HR and payroll complete their common tasks?			
☐ Are integrations, data ownership and responsibilities clear?			
☐ Is the implementation plan, including milestones and acceptance criteria, documented?			
☐ Do we understand the total cost of ownership and how benefits will be measured?			

Tip: Work through each question with your team. If you can't tick one off yet, assign an owner and a date to close the gap.



ELMO WORKFORCE MANAGEMENT

Decide cost, coverage and compliance before the shift is worked

For organisations that run on shifts, labour cost is committed the moment a roster is built. But it often isn't visible until after the pay run, when it's too late to change. ELMO Workforce Management brings award interpretation into the roster as it's built, so managers see what each shift will cost, where it breaches and what skills it needs before they publish.

- Live cost, breach warnings and skills checks inside the roster, not at pay run
- A full audit trail across roster and timesheet, with a reason code on every override
- An ELMO-maintained award library with a direct Fair Work connection, configurable for above-award arrangements and enterprise agreements
- Rosters, timesheets, leave, payslips and messaging in one app

See how ELMO Workforce Management costs and checks every shift before it's published.

Learn more

The Complete AI Workforce Platform™

ELMO brings HR, payroll and workforce management together on one employee data foundation. Native AI turns connected data into answers teams can act on, and local ANZ experts guide the change.

Trusted by more than 2,000 ANZ organisations and 1.2 million employee users.