

UKG Pro WFM Optimization Checklist

Are you maximizing your investment?

Use this checklist to analyze workforce data in your UKG Pro WFM environment and uncover patterns that may impact efficiency, staffing balance, and demand alignment.

Review each area and reflect on what the data is really telling you.

The Optimization Checklist

As you review your UKG Pro WFM data, check the statements that apply to your organization.

- Overtime levels are consistent and within expected ranges over the last 90 days
- Overtime is evenly distributed and not concentrated among the same employees
- Scheduled hours closely match actual worked hours
- PTO requests are spread evenly and do not create staffing pressure
- Skill mix is appropriately aligned across shifts and departments
- Consecutive shift patterns support staff wellbeing and compliance

Optimization starts with understanding what your workforce data is telling you.

✔ 5–6 boxes checked – Strong optimization foundation

Your workforce data likely reflects demand well, and your UKG Pro WFM environment is supporting consistent operational decision-making.

What this usually means:

- Overtime is controlled and predictable
- Staffing levels align closely with real demand
- Scheduling decisions are supported by data
- Skill mix is balanced across shifts
- Workforce patterns support both efficiency and staff wellbeing

💡 Recommended next step:

Focus on continuous improvement and long-term performance tracking.

👉 Still unsure?

A second set of expert eyes can validate what's working well.

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3–4 boxes checked – Optimization opportunities exist

Your environment is functioning well overall, but workforce data may be highlighting inefficiencies or emerging pressure points.

What this often indicates:

- Overtime used to compensate for demand fluctuations
- Variances between planned and actual staffing
- Uneven workload distribution across teams or shifts
- Scheduling patterns that may impact efficiency or engagement

Risk if left unaddressed:
Small inefficiencies can gradually increase labor costs and operational strain.

 **This is the ideal moment for a targeted “look under the hood.”**

0–2 boxes checked – Demand and scheduling may be misaligned

Your workforce data may indicate structural challenges between scheduling decisions and operational demand.

What we often see in this situation:

- Heavy reliance on overtime to solve staffing gaps
- Repeated pressure on the same employees or teams
- PTO or shift patterns creating avoidable shortages
- Skill mix mismatches impacting care delivery or operations

Recommended next step:
A deeper review can help identify root causes and prioritize improvements.

 ***Request a UKG Pro WFM Environment Review***

Request a Look Under the Hood

No cost · No commitment · Healthcare-focused

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