

Key Learnings

Connecting your workforce data

Discover the power of connecting your Allocate Optima workforce data to your BI tool or data warehouse

Read all the key learnings from our [webinar](#), where we discussed the advantages of connecting workforce data directly into your BI tool and data warehouse. Find out the benefits Surrey and Borders Partnership NHS FT have seen from connecting their workforce data to their BI tool.

Five reasons to connect your workforce data and BI tool / data warehouse



1. Creating a connection between your Allocate Optima data and your BI tool and data warehouse allows you to change the way you view your workforce data, displaying it in a structured format that is clear and easy to understand.
2. You can easily turn your data into actionable insights, making it simple to identify themes, trends and pinpoint areas for improvement.
3. Linking your Allocate Optima workforce data to your BI tool or data warehouse, allows you to automate your reporting, improving reporting frequency, accuracy and eliminating excel spreadsheets.
4. Creating a connection allows you to triangulate data from across multiple systems, such as ESR, finance and PAS systems. Enabling you to turn complex data from across all areas of your organisation into actionable insights.
5. You can create a clear and curated view of your data, refreshed daily, giving you real-time insights that can be turned into improvements.

The Surrey and Borders Partnership NHS Foundation Trust Story



Discover how the Trusts has linked their workforce data and BI tool to support staff and created insights

- The workforce intelligence team at the Trust wanted to modernise and automate their reporting to free up staff time. Staff is the biggest cost in the NHS, so enabling them to focus on other priorities was key, said Craig la Buscagne (Workforce Intelligence Manager).
- The Trust reports on staff absences every day to NHSE. They had multiple systems gathering this information, including Allocate Optima, spreadsheets, ESR systems and Sharepoint. The data was everywhere and it was taking an hour every day to consolidate, analyse and report in a standardised format.
- The Trust has now connected their Allocate Optima workforce data and BI tool, automatically feeding the data into their warehouse. It now takes approximately 5 mins to generate the report.
- Ad hoc requests, such as reporting on shift patterns were impossible before, due to complexity of the data. The connection between their data and BI tool now means they can easily provide reports on complex requests to senior management and the board.
- The curated views enabled by the connection are simple to get up to speed with, and cover about **90%** of the reporting needs for an average Trust, commented Craig.

The next steps: The Trust first wants to free up staff time by automating the standard reports that go out on a weekly/monthly basis, such as safe staffing, KPIs and management reporting. They then have two key focuses:

1. **Connect service quality KPIs.** There is currently no way to correlate staffing levels to monthly KPIs, such as wait times, service levels etc. The new data connection will allow the Trust to see how the service KPIs align with staffing, making it possible to answer questions like: *Does higher temp or agency staff lead to a dip in service KPIs? Which teams are performing best and how can we share their best practice across other teams?*
2. **Triangulate data for staff wellbeing.** The Trust want to use the connection between their Allocate Optima data and BI tool to correlate their occupational health, Datix and ESR absence data, to identify patterns where staff wellbeing is affected.

“Don’t be scared of the data - you don’t need to be a data analyst or scientist. It’s easy to work and connect. You’ll be surprised what you can uncover.”

Craig la Buscagne | Workforce Intelligence Manager
Surrey and Borders Partnership NHS Foundation Trust

Learn More

[Click here](#) to find out how you can connect your workforce data to your BI tool or data warehouse.