OPX Checklists

Transform your digital operations with OPX

Overview

Process adherence can be difficult to achieve, so while you may have the correct process for handling service requests and business events, how do you ensure people are following them?

Workflow based systems provide a good starting point, ensuring that you can track the big steps in a process. But what about off-system activities? How do you know they have been completed as expected?

Process Adherence

OPX Checklists provide a mechanism for monitoring process adherence and ensuring that the administrators are following the details of the process.

Checklists have always existed in offices, but with OPX, they are defined within the system and can be reported on and analysed to ensure they are completed each time.

Features

Checklist features include:
- detailed checklists at each process activity
- different lists for different products going through a process
- a range of control options from check boxes, through multiple choice to free text

Superusers define their checklists. They associate their checklists with processes, activities and product variations, after which they specify whether they appear before or after the case is presented to the user through the OPX "*get next*" functionality.

Survey Mode

Checklists can also be used in "survey" mode. A survey can be created and published to the teams allowing operational managers to get feedback on new or upcoming changes as well as feedback on any organisational or process changes.