



CUSTOMER STORY

FLEXIBLE. HR SOFTWARE THAT FITS THE WAY REAL TEAMS WORK

How Whitehall Group uses Evalu-8 HR to manage flexible working patterns, absence, and performance reviews

A closer look at how Whitehall Group has continued adapting Evalu-8 HR around evolving working arrangements and day-to-day people processes.



Whitehall Group
PENSION SERVICES

“The platform is flexible enough to adapt to the needs of the business rather than forcing a rigid process.

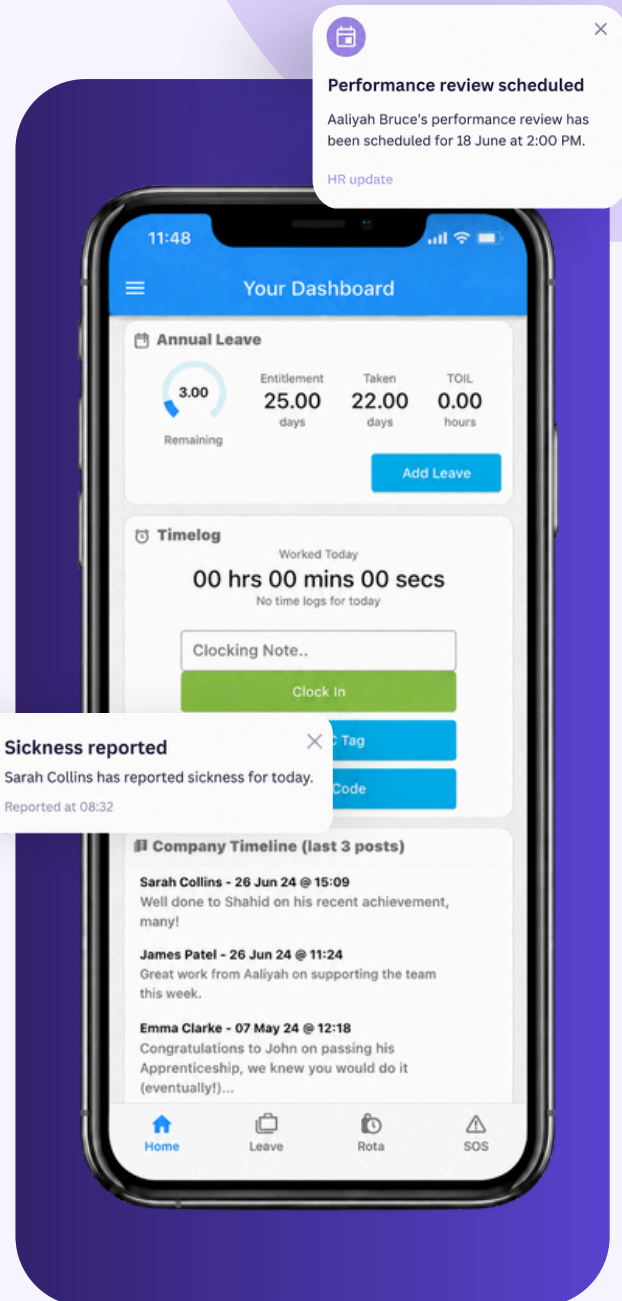
WHITEHALL GROUP HR MANAGER

Rotating working
patterns

Hourly leave
entitlement

Simple sickness
reporting

Structured
performance
reviews



ABOUT THE ORGANISATION

A pension-services specialist with evolving ways of working

About Whitehall Group

Whitehall Group is a multi-award-winning provider of pension services, specialising in Small Self-Administered Schemes (SSAS) and Self-Invested Personal Pensions (SIPP).

These are known as member-directed pension schemes because members make decisions about investments, contributions, and retirement planning, usually with support from an Independent Financial Adviser.

Best Pension Service

Named Best Pension Service at the 2025 Investment Life & Pensions Moneyfacts Awards.

Five-star ratings

Whitehall Group has received five-star ratings from Defaqto and Moneyfacts.

“

Evalu-8 was already in place when I joined the business, so I cannot really compare it against a previous system. However, we have continued developing and adapting it around our ways of working, particularly around flexibility, absence management and performance reviews.”

WHITEHALL GROUP HR MANAGER

SUPPORTING A MORE FLEXIBLE WAY OF WORKING

Adapting the platform as HR processes continue to evolve

Evalu-8 HR was already in place when Whitehall Group's current HR Manager joined the business. Rather than replacing an existing system, the focus has been on continuing to develop and adapt the platform around the organisation's evolving HR processes and working arrangements.

This has been particularly valuable as the business has introduced more flexible ways of working, including rotating shift patterns and a nine-day fortnight arrangement.

Flexible working arrangements

Specific working patterns configured around the way the organisation operates.

Connected absence processes

Working patterns link with holiday booking, sickness reporting and absence management.

Flexible working arrangements

Tailored models support a more structured approach across managers.

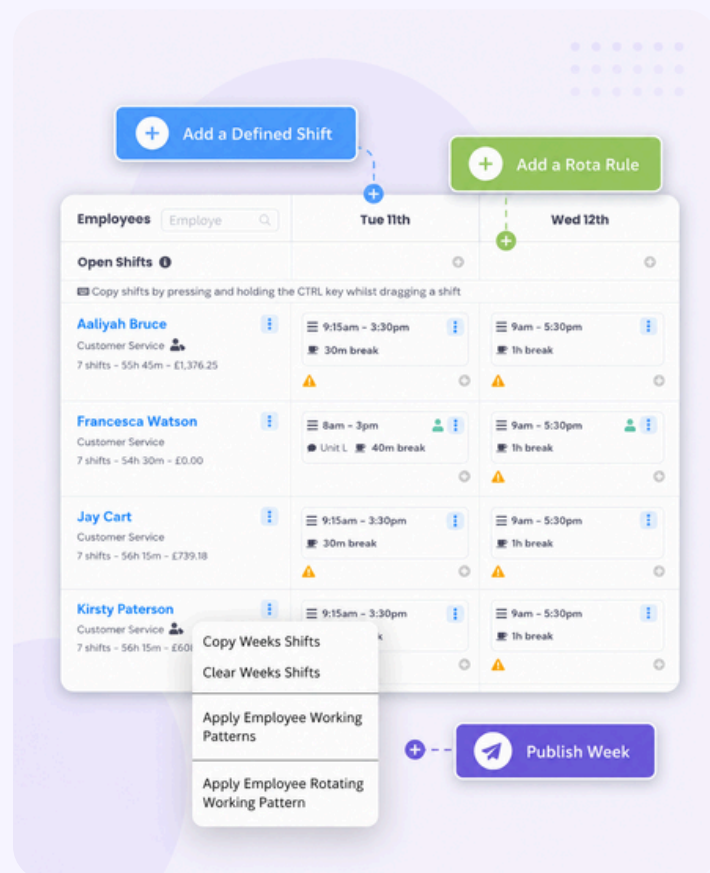
WORKING PATTERNS THAT REFLECT THE REAL BUSINESS

Managing rotating shift patterns and a nine-day fortnight

One of the most useful parts of Evalu-8 HR has been the ability to configure specific working patterns around the way Whitehall Group operates. The platform supports rotating shifts, custom working hours, and the organisation's nine-day fortnight arrangement.

These patterns also connect with holiday booking, sickness reporting, and absence management, helping the HR team maintain a clearer view of employee availability and leave entitlement.

Rather than relying solely on standard working days, Whitehall Group can track leave in hours. This makes it easier to reflect different working patterns accurately and manage employee entitlements fairly.



“The ability to build specific and rotating shift patterns, including our nine-day fortnight arrangement, has been really useful. It links well with absence reporting and holiday booking, while also supporting custom working hours and leave entitlement tracking in hours rather than just days, which suits the flexibility within our business.

WHITEHALL GROUP HR MANAGER

“The sickness reporting side is also simple and easy to manage.

WHITEHALL GROUP HR MANAGER

Connected processes, clearer oversight

Configure the working pattern

Reflect rotating shifts, custom hours, and non-working days

Connect holiday booking

Track entitlement in hours where this better reflects flexible working.

Record sickness simply

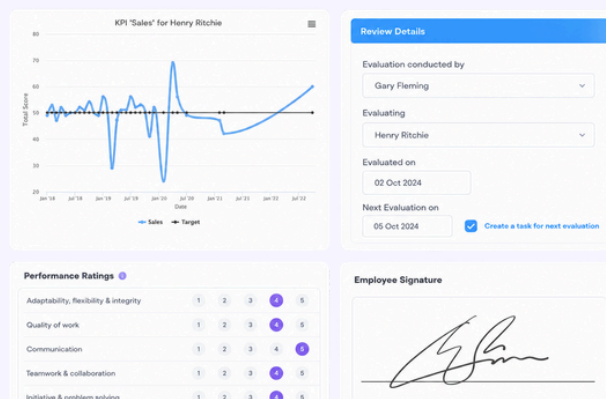
Maintain a clearer day-to-day picture of availability and absence.

A MORE CONSISTENT PROCESS ACROSS MANAGERS

Creating a clearer approach to performance reviews

Whitehall Group has also used Evalu-8 HR to improve the way performance reviews are managed across the business.

Previously, review processes could vary between managers and rely on different paper-based forms. By building tailored evaluation models within the system, the HR team has been able to introduce a more structured and consistent approach.



“

The evaluations area made a big difference for us. We built a number of models into the system to help standardise and streamline performance reviews rather than relying on paper forms that varied between managers.

WHITEHALL GROUP HR MANAGER

As Evalu-8 HR continues to develop, Whitehall Group is now exploring how the newer Form Builder functionality can support the next stage of this process.

“

More recently, the Form Builder has been introduced to replace evaluations, which I'm interested to see develop further as we continue using it.

WHITEHALL GROUP HR MANAGER

WHAT CHANGED IN PRACTICE

Replacing varied paper forms with a more structured workflow

Tailored evaluation models

Build review structures that reflect the needs of the business.

Greater consistency

Help managers follow a clearer, more standardised process.

Room to keep evolving

Explore how newer Form Builder functionality can support the next stage.

A MORE CONSISTENT PROCESS ACROSS MANAGERS

A platform that fits the size of the business and keeps fitting over time

A platform that fits the size of the business

For Whitehall Group, the value of Evalu-8 HR lies in its balance between functionality, flexibility and cost. The platform provides the tools needed to manage the organisation's HR processes without forcing the business into a rigid structure or introducing unnecessary complexity.

While larger enterprise systems may offer additional functionality, Whitehall Group has found that Evalu-8 HR provides a strong fit for the way the organisation operates.



There are larger-scale systems on the market with more AI-driven functionality, but for the size of our business, Evalu-8 is a very good fit."

WHITEHALL GROUP HR MANAGER



From my experience using it, the platform is flexible enough to adapt to the needs of the business rather than forcing a rigid process. I also think it offers a strong balance between functionality and cost."

WHITEHALL GROUP HR MANAGER



More recently, the Form Builder has been introduced to replace evaluations, which I'm interested to see develop further as we continue using it."

WHITEHALL GROUP HR MANAGER

ONGOING SUPPORT AND TRAINING

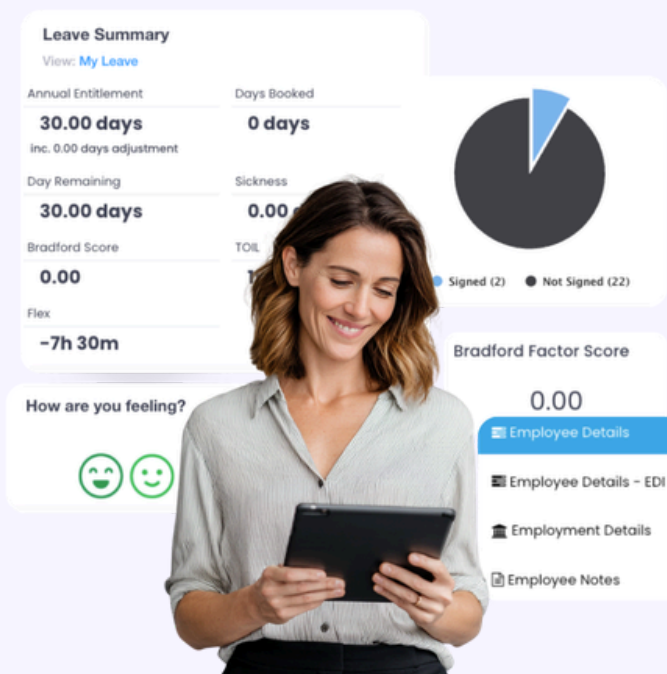
The relationship has not stopped at implementation

As Whitehall Group has continued adapting the platform, the Evalu-8 support team has provided responsive assistance and individual training sessions when required. This has helped the HR team get more value from the system over time and continue refining how it is used across the organisation.



The support side has also been a real positive. Support tickets are responded to quickly, and I have had individual training sessions when needed, which has helped us get more value out of the system over time."

WHITEHALL GROUP HR MANAGER



THE OUTCOME

HR software that can keep adapting as the business evolves

The outcome for Whitehall Group

Evalu-8 HR gives Whitehall Group a flexible platform that can continue developing alongside the business.

By supporting custom shift patterns, hourly leave entitlement, holiday booking, sickness reporting, and more consistent performance reviews, the system helps the HR team manage important day-to-day processes in a way that reflects how the organisation actually works.

For Whitehall Group, the key benefit is not simply having HR software in place. It is having a system that can be adapted over time as working arrangements, processes, and priorities continue to evolve.

What the platform supports

- Specific and rotating working patterns
- Nine-day fortnight arrangements
- Leave entitlement tracking hours
- Holiday booking and sickness reporting
- Structured performance-review processes
- Responsive support and individual training



For the size of our business, Evalu-8 is a very good fit.”

WHITEHALL GROUP HR MANAGER

Explore Evalu-8 HR

Evalu-8 HR brings employee records, absence management, working patterns, documents, training, performance processes, and reporting together in one place.

Book a demo to explore how the platform could be configured around the way your organisation works.

[Book a 30 min session](#)

evalu-8.com/hr-management-software/

