

Getting Started with Scheduling

Best Practices for a Shift-Based Workforce



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If you're a shift-based scheduler, you know it can be a challenging job. You're constantly juggling a variety of factors — coverage needs, employee availability, communication issues, last-minute changes — all in an effort to schedule effectively, in a way that works for your organization as well as your team.

To guide you through this complex process, WorkSync has crafted this handy how-to guide focused on the basics of smart scheduling. No matter what industry you're in, these foundational steps will get you started down the right path, as you plan with foresight and anticipate obstacles before they arise.

When scheduling works well, the benefits are vast for employers and employees alike.

01 Figure Out Your Needs

The first thing you must do in crafting a schedule is to figure out your needs. This will be the basis for everything that comes after. A great way to start is by asking questions:

- What are the shifts that we need covered? When and where are they?
- How many employees are needed for each shift?
- What skills and/or qualifications must employees possess for given shifts?
- Are there federal, state, or industry staffing requirements to adhere to?

The answers to these questions will identify the shifts you have to fill and how you have to fill them. Depending on your sector — like if you're in healthcare, for instance — regulations may come into play with regard to how many employees are required for certain shifts and what certifications they might need.

Once you've determined your shift needs, you can lay them out, either manually — in a spreadsheet tool, for example — or, even better, in a scheduling software platform. A software solution makes your life a lot simpler. Now you have a clear, systematic picture of your organization's scheduling demands, and you can move forward to meet them.

02 Identify Your People

The next step is to make sure you know who all your people are. These are your human resources: the individuals who make your organization go. This may sound simple, but in a fast-paced workplace — with employee turnover, new hires, and promotions or title changes — it can be tricky to keep track of your personnel. Ask some more questions:

- What is our most up-to-date list of employees to draw from?
- What are employees' current positions and qualifications?
- Are there contingent workers we have on last-minute standby?

Maintaining a full, accurate staff roster is key here — and that's far easier when you have scheduling software integrated with an automated employee database.

In addition to knowing who your people are, you should know their **work preferences**.

All employees should provide you with their:

- Availability
- Travel constraints
- Qualifications and/or preferred roles

This information will help you narrow down the pool of potential workers for specific shifts — and you'll avoid scheduling people for shifts they're unable to cover.

Now that you have a firm grasp of your needs, your employees, and their preferences, you're ready to assign shifts. But before you do, think about ways to empower your team.

03 Give Power to Your Team

Scheduling works better when employees feel empowered to be part of the process. There are several ways you can make this happen.

Mobile Communication

Making use of mobile technology does wonders for communication between managers and staff. With smartphones in hand, team members can easily send and receive messages and notifications — in case their availability changes or some other important information needs to be communicated.

Employees can also use mobile to conveniently view the up-to-date shift schedule at any time, even if they're not in the physical workplace.

Self-Scheduling

Self-scheduling is another empowering practice. This means that when it comes time to assign shifts, you leave either all or some of them open so that workers can fill them on their own. Then all you have to do is approve the shift pickup, and it's taken care of.

Employees know best when, where, and how they're able to work. Giving them choice over their schedules instills a sense of trust and agency that increases their job satisfaction and commitment. Plus, it saves you the headache of having to assign every shift yourself.

Shift Swapping

Finally, you can give your staff the ability to trade shifts with each other, which comes in handy if someone is suddenly unable to cover their scheduled slot. Instead of the cumbersome process of notifying a manager, who then has to seek out a replacement, employees can communicate with each other directly to resolve the issue.

This saves time and trouble — and enables your team to be problem solvers.



04 Expect the Unexpected

No matter how carefully you craft your schedule, unforeseen circumstances will inevitably arise, leading to last-minute changes that may be hard to navigate. But what you *can* do is prepare for them in advance, so they can be dealt with quickly and simply.

We've already covered some of these, but here are a few preemptive measures you can take to stay on top of the unexpected:

- Facilitate communication so it's easy to spread the word about changes
- Allow employees to effortlessly swap shifts if necessary
- Have contingent workers on standby if your regular staff is unavailable

It's impossible to *prevent* changes from happening. People get sick, or need to attend to family needs, or even leave their positions without notice. But that doesn't mean you have to wind up with unfilled shifts and an understaffed organization. With the right preparation in place, you can always be ready for whatever's thrown your way.

05 Take Stock

Getting through a successful scheduling period is a real accomplishment. Savor it, but also know there's still more work left to do.

Once a scheduling period is complete, it's time to **take stock** of your process so you can learn lessons and address them in the future. Go back to the question format:

- What have your shift needs been in the past period? In what areas have you required more or less employees than you anticipated?
- What have your human resources been? What groups within your team have been the most and least reliable?
- Have you experienced problems? What were your biggest pain points?

This information is vital. Review and analyze it closely, because it will allow you to make informed decisions and plan wisely going forward.

Scheduling is an ongoing endeavor. The more you do it, the more skilled at it you get. We at WorkSync hope these fundamentals will help support you as you strive toward a streamlined, efficient scheduling process — one that best serves your team and strengthens your organization.

To learn more about WorkSync and its leading scheduling solutions, visit us at [WorkSync.com](https://www.worksync.com).

