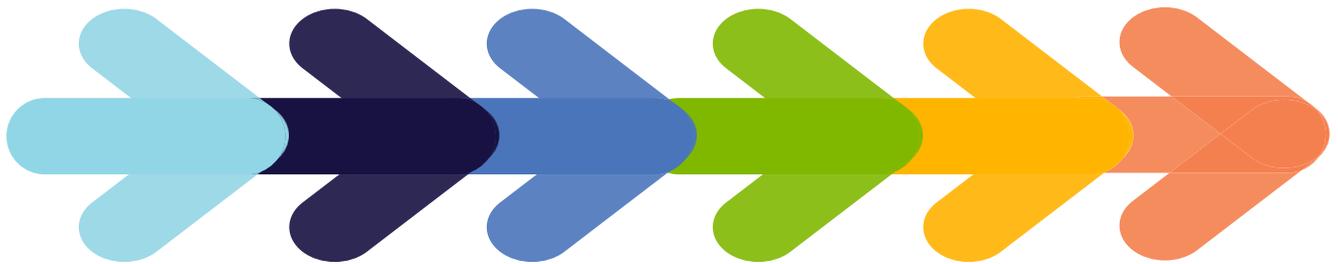


# *SHIFT FORWARD*



THE POWER OF TECHNOLOGY TO  
TRANSFORM EMPLOYEE SCHEDULING

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# I. The Challenges of Scheduling

In the shift-based workforce, employee scheduling is more important than ever before. A major study found that:

**Stable scheduling increases both sales and labor productivity for employers**

But the issue is equally critical to employees. According to a recent survey:

**Flexible scheduling is the second-most significant job factor for today's workers**

Scheduling, though, brings an array of challenges for organizations. Managers must juggle shift needs, employee availability, communication problems, last-minute changes, and a variety of other complex circumstances. Creating a clear, effective, flexible schedule can seem like a Herculean task.

Fortunately, that's where technology comes in. **The right software can transform the scheduling process, removing difficulties and making employers' — and employees' — lives a whole lot easier.** In our fast-paced 21st-century working world, that's an invaluable benefit.

But before we explore the many advantages of technology-based solutions, let's look at some of the biggest scheduling challenges in greater detail.

## Tracking Needs and Resources

Whether your industry is retail, healthcare, food service, or beyond, it can be very difficult to keep track of all your scheduling needs:

- How many and what kinds of employees are required for given shifts at various times and locations
- Special periods — for instance, holidays — when more or less employees may be necessary
- In fields like healthcare, government regulations for staffing

On top of your *needs*, you must also possess a firm grasp of your *resources*:

- The current pool of workers you have to draw from
- Workers' availability, job preferences, qualifications, overtime status, etc.
- Available backups and substitutes in case of changes on short notice

If you're attempting to schedule manually, all of these elements can be overwhelming to manage. Depending on the size of your organization, it may be nearly impossible. Especially given that your needs and resources will inevitably fluctuate based on unpredictable factors like employee absences and turnover.

## Effective Communication

Crafting a schedule is one hurdle — communicating it is another. Managers struggle to find effective ways to communicate shift schedules so that:

- All employees are made aware of the schedule at the same time
- There's clarity, not confusion, in its presentation
- Employees are able to respond with any questions or concerns

This last point is a key one. Meaningful communication is a two-way street. It's not just about managers making workers aware of their schedules; it's also about **ensuring that workers have a convenient way to be in touch with managers**. What if a worker's availability or preferences have changed? They must be able to let their employer know.

And if two-way communication *doesn't* exist, there can be consequences. A University of Chicago study found that:

- Employees with more input into their schedules report lower levels of stress, work-to-family conflict, and interferences with non-work activities

In other words, if employees *don't* have input, that can reduce their job satisfaction — which may lead to increased absences or turnover.

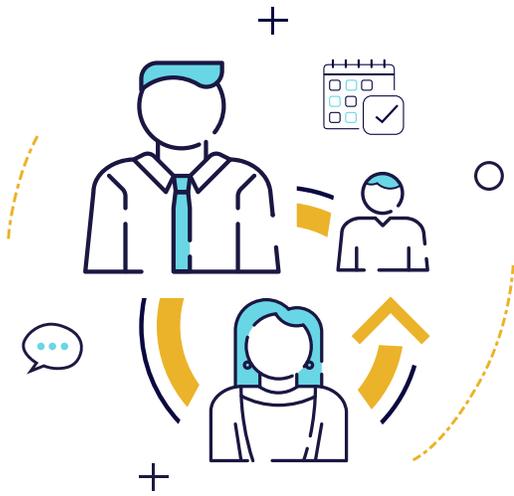


## Last-Minute Changes

Last-minute changes may be the single greatest obstacle to shift-based scheduling. And when you have a manual process in place, the headache can get even worse.

Changes arise on short notice for any number of reasons, including:

- Employee absences due to illness or other circumstances
- A sudden rise in staff needs due to unforeseen factors
- Employee turnover without advance warning



Let's take the first example. If a worker calls in sick the morning of a shift, their manager must scramble to find a replacement, which can be difficult. Or if the worker *doesn't* call in and simply doesn't show, the problem is compounded — and there's no time to fix it.

This kind of cumbersome process — mostly likely driven by old-fashioned phone calls — can **cause undue stress and leave an organization understaffed**. In some sectors, like healthcare, that could substantially heighten an employer's risk of falling short of compliance requirements.

## Measuring Trends

When a given scheduling period ends — a month, say — you want to be able to track and measure recent patterns, such as:

- Which employees have been consistently available or unavailable?
- What times, locations, and areas have had the highest and lowest shift needs?
- Has over- or under-scheduling been a problem? How often?

With a manual system, it's hard to look back at a hectic month of scheduling and sift through the paperwork to identify the trends you want to know about. And it's vital to know about them. Why? Because they'll guide you going forward.

As you create a schedule for the next month, you should have **an understanding of what your needs and resources have been in recent periods, so that you can make informed decisions**. Otherwise, you may find yourself running into the same roadblocks — like short-staffing or excessive overtime — over and over again.



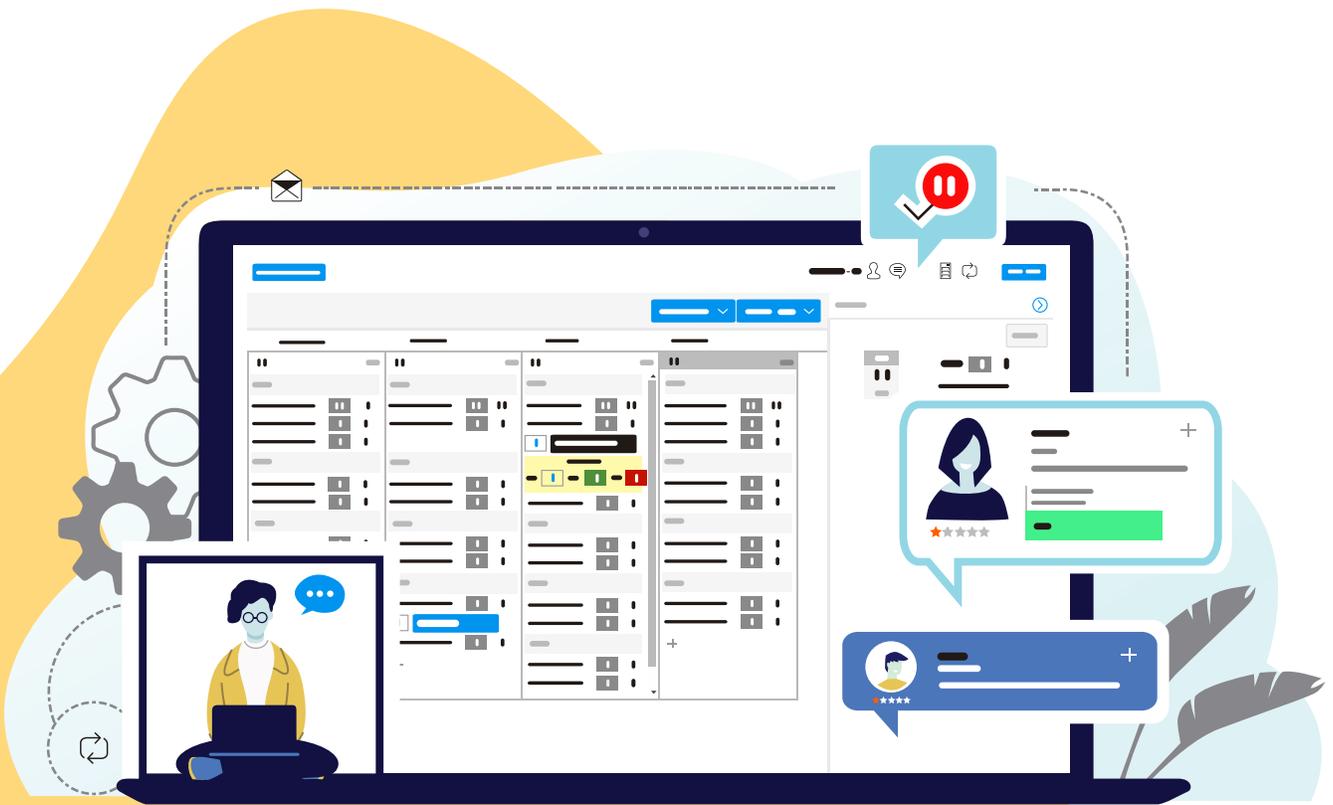
# II. The Advantages of Technology

Now that we've examined the challenges of shift-based scheduling, let's pivot to the solution: **technology** — specifically, **scheduling software**.

Smart scheduling software offers countless advantages to both employers and employees, helping with **shift assignments, compliance issues, communication, last-minute changes, measurement and analysis**, and more. It saves managers massive amounts of time and trouble while also empowering staff to have more agency over their work. In short, **it's a game changer**.

Once you partner with a software provider to tailor a scheduling solution to your needs, the sky's the limit. **Virtually any difficulty you faced in a manual process can be addressed or overcome through technology**. And the more complex your scheduling demands are, the more crucial this is.

So let's find out just how the right scheduling software can make all the difference for your organization.



## I. Know Your Needs

With the power of technology, you no longer have to keep track of your scheduling needs manually. You can simply input your key information into the software:

- The number of employees you need for all shifts, by time, place, and role
- Any special qualifications employees must hold for certain shifts
- Any federal or state staffing requirements, in fields like healthcare

Once you've entered this information for a given scheduling period, it's right there at your fingertips. You know exactly what shifts you've got to fill and how to fill them. And if your needs change for any reason, you can always make adjustments.

A **visual scheduling** tool — in which you can see your shifts laid out in a visible calendar — is an especially helpful feature. With a virtual scheduling map in front of you, you're far less likely to run into confusion.

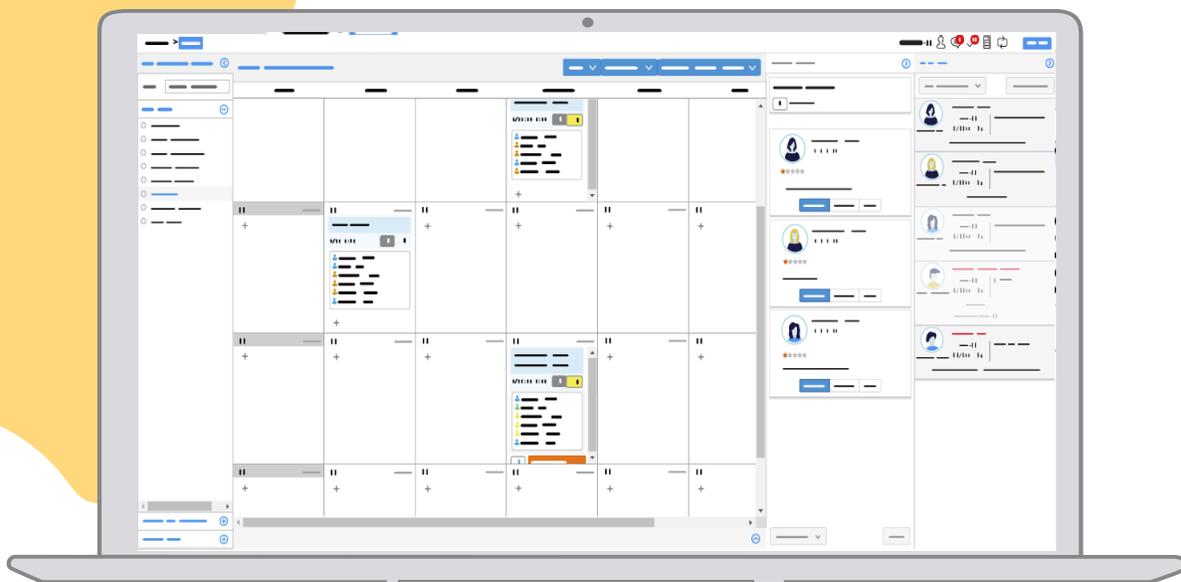
## Know Your People

Software is also the best way to know who all of your *people* are. In a fast-paced workplace, it can be hard to keep up with factors like turnover, new hires, and promotions/title changes. But an automated system helps you stay on top of:

- The most up-to-date list of workers you have to pull from
- Workers' current positions and qualifications
- Contingent workers you may have on last-minute standby

When you have instant access to a full, accurate personnel roster, you know who's available to work which jobs. And if people leave or join your organization, or if they assume new roles, **the software automatically reflects these changes.**

Thanks to technology, the burden of manually monitoring your human resource pool vanishes, and you maintain a firm grasp of the people who make your operation thrive.



## II. Assign with Ease

Assigning shifts can be one of the most complicated, time-consuming parts of a manager's job. But it doesn't have to be. Scheduling software expedites the process exponentially.

For any given shift, you can input "rules," or specifications — factors like:

- Shift location
- Type of worker(s) needed
- Required qualifications

And all of your employees' information will be in the system too, including:

- Availability
- Travel constraints
- Work preferences and/or certifications

Your scheduling solution can take it from there, narrowing down the pool of potential employees based on the parameters of the shift. That may leave a few eligible workers — and either you or they can decide who covers it.

With shift data and personnel data entered into your system, there's no longer a need for you to do the laborious work of matching shifts and employees. With just a few clicks, your software takes the reins.

### Avoid Issues

Yet another benefit of an automated scheduling solution is that it helps you:

- Avoid costly issues like overtime
- Ensure that you're giving employees the number of hours they expect or are contracted for

How? By **drawing on workers' time and attendance information.**

When your scheduling software is integrated with your time and attendance system — **or, better yet, when they're one and the same** — you can be automatically notified if employees are approaching overtime hours, or if they need to be scheduled for *more* hours. This saves you money and keeps you on the right side of labor regulations.

Without a technological aid, you may find yourself dipping into your organization's budget with frequent overtime pay. But software enables you to easily factor in your employees' hours worked and steer clear of unnecessary costs.

### III. Empower Your Team

Maybe the most essential perk of technology is that it helps you **empower your employees**. And the key to this is **mobile**.

Your scheduling software can be linked to a mobile app on your staff's smartphones, which means that:

- Schedules will be instantly and transparently available to all workers at all times

This solves the persistent problem we discussed earlier, with managers struggling to ensure that employees are properly made aware of schedules. Now, once a manager publishes a shift schedule, staff receive a notification and **can view it immediately on their phones**. This way, everyone's always on the same page.

When workers are given a mobile scheduling option, they feel **trusted and empowered** rather than beholden to a burdensome manual process. Why stare up at an old-fashioned shift board when you can simply see a digital one in the palm of your hand?



#### Fuel Communication

Mobile technology also **facilitates communication between employees and managers**.

Gone are the days of phone calls, or missed calls, or *no* calls. With mobile:

- Staff can quickly and easily send real-time messages to managers, and vice versa

Workers are able to:

- Ask questions about their schedules
- Notify managers of changes to their availability
- Express any other preferences or concerns they may have

A few brief text messages can convey critical information and avoid a whole lot of confusion for both parties.

Most importantly, though, **fluid communication makes your employees feel heard**. They have the ability to respond, give input, be part of a two-way dialogue. They develop a deeper sense of agency over their schedules and work lives. Ultimately, their job satisfaction grows, and so does their commitment.

## IV. Navigate Change

In the shift-based workplace, last-minute changes are inevitable. Employees get sick. They have family commitments. They leave the organization. But with software, you don't have to panic; **you can deal with these changes swiftly and conveniently.**

In addition to workers being able to inform managers of changes with a quick mobile message, there's another advantage:

- Software helps managers rapidly identify the pool of workers who can fill in for a given shift

Who's currently available? Who's not approaching their overtime limit? Who has the skills and qualifications to replace the employee who can't make it?

With a manual system, it can be arduous for managers to answer all these questions and pinpoint the right worker to serve as a substitute. **But a technology-driven solution makes the process fast, painless, and efficient.**

### Shift Swapping

Mobile communication also means that managers don't have to be the ones responsible for dealing with changes to employee availability. **Employees can do it themselves.**

**Shift swapping** is a huge plus that technology enables.

- If an employee is unable to cover a shift, they can simply send a mobile message letting their coworkers know.
- An employee who's available and qualified can step up to take the shift.
- The swap can be sent to a manager for approval, and it's good to go.

Not only does this scenario save managers time and trouble — **it further empowers workers**, who can take their shifts into their own hands and solve problems without having to go through an intermediary.

Numerous studies show that employees value having input into their schedules. Inviting them to smoothly trade shifts with one another is a great way to give them that privilege.

## V. Review and Analyze

Finally, technology allows you to **review trends** from past scheduling periods with ease:

- What have your shift needs been?
- What have your personnel resources been?
- Have you run into problems? If so, where?

Managers no longer need to sort through a stack of records and timesheets to extract this information. With software, it's all right there in the system waiting for you.

And once you have the information, you can **analyze** it, asking questions like:

- In what areas have we been requiring the most employees?
- What groups within our workforce have been the most and least reliable?
- What are our biggest pain points when it comes to scheduling?

This kind of periodic analysis of scheduling patterns is crucial. It's what helps you plan for the future.

### Plan Ahead

As you move into a new scheduling period, take what you've learned from the past — based on the data drawn from your software — to **plan wisely**.

- Line up contingent or standby workers for tricky shifts where there's often fluctuation in availability
- Assign shifts accordingly to employees who may need more or less hours going forward
- Leave certain shifts open so that your staff feel empowered to fill them on their own

Shift-based scheduling is an ongoing challenge, but you can always find ways to do it more effectively. Think of each scheduling period as a learning experience to grow from.

In sum, while employee scheduling comes with many hurdles, technology lets you leap over them with **streamlined processes, greater precision, and enhanced communication**. Powerful scheduling software can do wonders for your organization, improving the lives and work of managers and staff alike.

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



# III. Take the Next Step

## Download Our *Getting Started with Scheduling* Guide

This handy how-to guide covers best practices and will help you take the right steps toward effective, successful scheduling — to benefit both your organization and your employees.

### Getting Started with Scheduling

Best Practices for a Shift-Based Workforce



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You're constantly juggling a variety of issues, last-minute changes — all in an effort to please your customers as well as your team.

This handy how-to guide focused on the foundational steps will get you started on the right path before they arise.

These steps are applicable to all employees alike.

Identify your needs. This will be the basis for your scheduling strategy:

• Who are they?

• What are their needs for given shifts?

• What regulations do you have to adhere to?

• What are the legal requirements and how you have to fill them. — regulations may come into play and what certifications they might need.

• How you manage them manually — in a spreadsheet tool, or with a software solution makes your life a lot easier when you have scheduling demands, and you can

• Who are your human resources: the people you have available. — but in a fast-paced workplace — with many changes, it can be tricky to keep track of your

• How many?

• What are they doing by?

• How do you manage them when you have scheduling

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

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# IV. Recommended Resources

Here's a brief list of the articles and studies we referenced in this guide. If you're interested in learning more about issues around employee scheduling, we encourage you to continue to explore the resources currently available on the subject.

## **“The Future of Work: Survey Shares New Ideas for Fighting Turnover, Disengagement and Frustration.” Forbes.**

<https://www.forbes.com/sites/chriswestfall/2019/10/28/future-of-work-survey-shares-new-ideas-employee-engagement-satisfaction/>

## **“Irregular Work Scheduling and Its Consequences.” Economic Policy Institute.**

<https://www.epi.org/publication/irregular-work-scheduling-and-its-consequences/>

## **“Stable Scheduling Increases Productivity and Sales: The Stable Scheduling Study.” UC Hastings, the University of Chicago, and UNC.**

<https://worklifelaw.org/publications/Stable-Scheduling-Study-Report.pdf>

## **Work Scheduling Study. The University of Chicago.**

<https://voices.uchicago.edu/workschedulingstudy/>

## **“Workplace flexibility benefits employees.” American Sociological Association.**

<https://www.sciencedaily.com/releases/2016/01/160113133342.htm>