



A COMPLETE GUIDE TO

# Employee Scheduling



# The Complete Guide to Employee Scheduling

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# Introduction

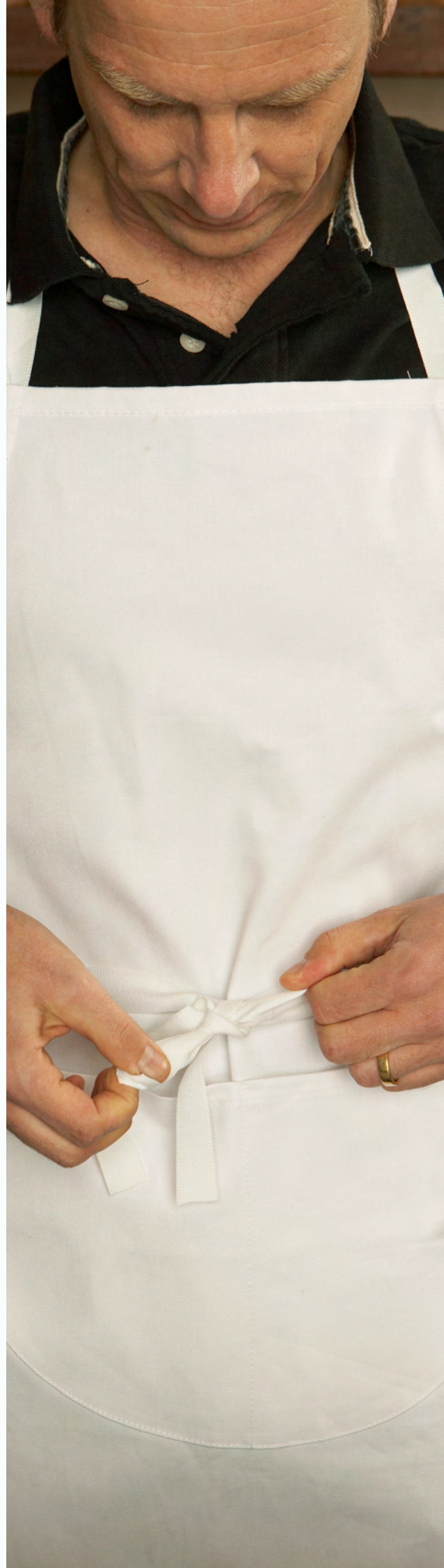
The days of manually scheduling and tracking employees' time and attendance are numbered. Today's automated scheduling solutions can save companies time and money while engaging and empowering employees.

Having the right scheduling platform means being able to get accurate staffing forecasts based on demand. As a result, companies can avoid over- or understaffing and unnecessary labor costs.

At the same time, due to increase wage and hour laws employee schedules can no longer be based solely on business demand. These laws require schedules to reflect employee preferences. Intuitive software can inform the organization when an employee is available and how many hours that person wants to work each week.

Modern scheduling practices also allow employees to communicate to managers regarding time off or co-workers who may want to swap shifts. Employers can build schedules that are more predictable, consistent and adequate so employees can better plan their lives and budgets and reduce use of sick days and shift trading.

If you have an hourly workforce, our Complete Guide to Employee Scheduling eBook contains the tips and tools you need to eliminate scheduling headaches, streamline operations and reduce labor costs. You'll learn how to navigate the foundations of good employee scheduling, understand how technology improves your scheduling strategies, and maintain labor compliance all while helping employees perform at their best.







## Chapter 1:

# Employee Scheduling 101

Creating and filling an employee schedule takes complex planning and hours out of a manager's week. It can have massive impacts on a business, especially for organizations with a large hourly workforce and a high percentage of labor costs.

Many factors go into the scheduling process and creating the most effective schedule, including having the right expertise on your team, communicating with your frontline staff, and using the right employee scheduling software.

Here's exactly how to schedule employees effectively.

## Use labor forecasting to create optimal schedules

Labor forecasting is a powerful tool in employee scheduling.

It allows you to predict how busy the business will be and how many employees need to be working at any given time to accomplish the needed amount of productivity. Specifically, you can use it to address availability and common shift scheduling challenges like overstaffing and understaffing.

But many organizations don't use labor forecasting to inform their decisions on scheduling shifts. According to the Workforce Business Intelligence Board's 2020 HR State of the Industry Survey, only 21.1 percent of organizations have used workforce analytics to inform decisions about employee schedule shifts.

There are two main types of data that go into these predictions. There's data on external factors, like the time of the year, weather, or whether some large event is happening nearby. And then there's data on your specific business's conditions and operations.





To understand the drivers of your business that impact employee scheduling, you can go through this simple two-step process:

- ✓ Identify a unique, recurring “project” or goal in your business. What tasks go into that project every week?
- ✓ Get a deeper understanding of how your workforce accomplished those tasks by asking them about their day-to-day workload and how many hours it takes to complete each task.

While no prediction is 100 percent certain, the more accurate and relevant data you can provide, the more confident you can be in your forecasts and employee scheduling, reducing your chances of overstaffing or understaffing.

## Understand the laws that govern schedules in your city or state

Scheduling employees effectively, at its most basic level, requires compliance with labor laws.

Depending on the specific law, employers may have to [schedule employees up to two weeks in advance](#). Further, these laws may levy employer penalties for unexpected employee work schedule changes, regulate “clopening” shifts, and define schedule record keeping requirements for employers.

These laws address the challenges many hourly workers face, including unpredictable, unstable, and insufficient hours. Certain shift scheduling practices like on-call scheduling make it difficult for employees to hold second jobs or plan for other responsibilities in advance.

But a good number of employers dislike the perceived lack of flexibility the laws impose on them, making it more difficult to make last-minute shift schedule changes.

Here’s where [Workforce.com’s employee scheduling software](#) can help. Beyond helping employers track employee attendance and reliably schedule employees in advance, it’s kept up-to-date with legal rules and regulations.

Plus, managers can set their own employee scheduling rules. The software notifies managers if they break a law or rule when placing people in open shifts, so it makes it simple to stay compliant with predictive shift scheduling laws.



## Match the right employees to the right shifts

Filling open shifts is complicated beyond just legal compliance and predicting business needs.

Employees have different preferences and limitations, and managers want to assign shifts that consider availability in a way that's fair. A flexible schedule can be effective in accomplishing this, as well.

We recommend a combination of scheduling algorithms and employee input for filling shifts.

That way, a business can benefit from advances in technology while also taking real-world, human considerations into account. The human aspect improves the technology and minimizes scheduling conflicts.

Specifically, we've found a scalable, effective way for staff to indicate their employee scheduling preferences through shift swapping in our scheduling app. It gives them the stability and flexibility of getting their work hours while juggling other responsibilities in their lives.





## Use shift ratings to measure the effectiveness of employee schedules

How can you gauge the success of a shift schedule in terms of efficiency and productivity?

That's where shift feedback and ratings come in.

After a shift has ended, managers can consider what went well, what needed improvement, gauge employee satisfaction, and analyze whether staff members were effective. Any appropriate feedback that comes from this analysis tips labor forecasting in your favor.

Workforce.com's [shift ratings and feedback](#) solution allows managers to quickly rate employees on a five-star scale after each shift. Managers can then access employees' ratings while putting together a schedule, helping them match the best employees to the specific needs of each shift.

Employees also have the chance to submit feedback on the Workforce.com mobile app about what went well versus what did not go well during their shifts, whether it was on-site or remote work. They can give feedback on a range of topics including staffing levels, employee engagement, and management.

The more insights you have on the perceived effectiveness of shift work from both the manager and employee points of view, the more you can understand what's happening on the front line and make good, strategic staffing and employee shift scheduling decisions.

Your manager would like feedback on how your shift went



What went well?

Communication

Team members

Staffing level

Morale

Organisation

Management



What went well?

Communication

Team members

Staffing level

Morale

Organisation

Management





## Actively reassess and adapt

The common thread running through these steps is that nothing about employee scheduling is static.

Laws change, individual employees may become more or less productive over time, and the most efficient ones may leave if they're not getting sufficient hours or good shifts.

Continually use the resources and data you have to understand what's successful on your front line. The same old employee shift scheduling patterns might stop working over time. And your employees' needs and levels of engagement will change. Effective employee shift scheduling requires that you're aware of these developments and adapt to them.





## Chapter 2:

# Employee Scheduling For Different Industries

Employee scheduling is more than just assigning employees to work on your business hours. There's a lot of factors that go into building shifts such as customer demand, labor budget, and staff availability.

Let's take a look at how employee scheduling varies for different types of businesses.



## Restaurant

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The restaurant business runs on a careful balance of the right number of employees doing the right work at the right time. But the first and most important step — putting together an effective schedule — is anything but simple.

Understaffing means restaurant workers will be busier than necessary and not have as much time for excellent customer service. Meanwhile, overstaffing means restaurant servers make less in tips, and the restaurant itself will overpay on labor costs.

You can avoid both of these wasteful work situations.

With the right processes, workplace culture, and restaurant shift scheduling software, you and your managers can avoid scheduling conflicts and create the most accurate schedule possible. Here's how to create an effective restaurant employee schedule.

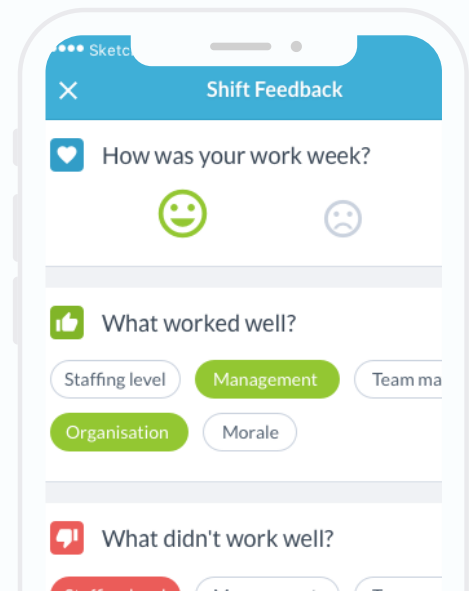




## Ask candidates about their scheduling preferences and constraints

Turnover has many negative downstream effects on a food service business, including an increase in the time and money needed to find, hire, and train new employees. And your restaurant scheduling process could be contributing to employees' dissatisfaction. Consider the length of a shift when you schedule hourly employees.

Unless a restaurant employee specifically requests it, scheduling short shifts are a quick route to a disengaged workforce. A shift of four hours or less can have financial consequences. An employee may actually lose money working a short shift thanks to commuting costs and potential additional costs like elder care and/or child care.



Workforce.com shift feedback

Avoid creating schedules with too-short shifts by asking employees for shift feedback. Do they think the restaurant is adequately staffed for rushes? Or are they chronically understaffed at critical points in the day? Keeping shifts in the 6- to 8-hour range will help employees stay fresh and engaged and give them plenty of time to earn tips.

Be proactive in the interview process and ask your potential hires about their scheduling preferences. Perhaps they prefer evenings since they are in school during the day? Or want to be scheduled on weekends because they enjoy busier shifts?







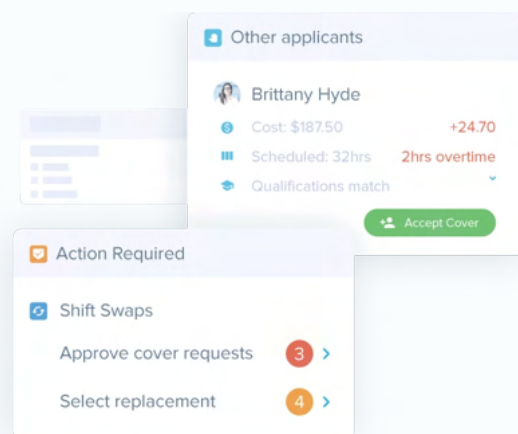
Some will ask you to split up their off days when you build out a schedule while others like consecutive days off.

You may not be able to accommodate every schedule request or preference. But by asking, you can improve employee engagement and reduce turnover in restaurants. You're showing your team that you care about them as people, not just as employees.

## Build flexibility into your scheduling

While many on your team are fine with a schedule that varies days and hours, some hourly employees need stability because of other responsibilities that limit when they can work at the restaurant. Honoring those requests will make those employees more loyal, productive, satisfied and less likely to leave.

You also can add more flexibility to your restaurant scheduling with shift swapping capabilities.



Workforce Shift Swapping

Shift swapping software is like a scheduling assistant that gives managers the peace of mind that all shifts will be covered. They can rely on employees to find their own work replacements through the scheduling app, provided that the switch is in compliance with labor laws and not threatening the restaurant with unnecessary overtime pay.





## Provide the schedule as far in advance as possible

Last-minute and unclear schedules can have negative consequences on hourly employees, making it more difficult for them to plan their lives outside their jobs.

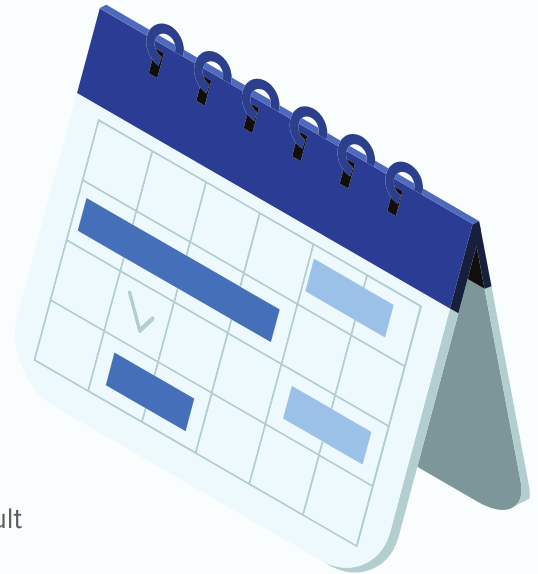
Finding child care, holding a second job (which many restaurant workers need to do [to afford basic necessities](#)), or taking continuing education classes all become more difficult when shift workers don't know what their hours will be.

A wave of [predictive scheduling laws](#) in the 2010s required that organizations with shift workers provide employees with their schedules up to two weeks in advance, giving employees more stability and flexibility.

This type of law only exists in certain cities and states, but the reality is that any hourly restaurant employee would benefit from predictive scheduling policies.

Look at the calendar; don't make employees wait until the last day of the month to see the schedule. Be transparent and consistent since staff schedule changes can be disruptive for employees. Building and posting the work schedule ahead of time relieves some of the stress that can accompany a flexible schedule.

One way to start scheduling in advance without the hassle of paperwork is with an online [restaurant schedule template](#).





A scheduling template is a good start. But the more data you have available, the more options you can access, the more accurately you and your managers can create shift schedules with the right number of employees at work at the right times.

Consider a more comprehensive solution like [Workforce.com's online scheduling software](#).

The software analyzes operational data about the specific restaurant, outside forces like the time of the year and weather, and even how long it takes employees to complete specific tasks.

So, it can predict how busy your restaurant will be at any given time, thereby helping you and your restaurant managers accurately forecast labor needs. When you plan well-informed, data-driven schedules, you can plan for optimally efficient labor costs.

10:00AM

— Staff Count	42
• Scheduled:	2
Variance:	+40

**Variance Breakdown:**

■ ACSI Legal	+30
■ IT	+34
■ Allied	+34

## Don't forget about time off, sick days, and holiday schedules

In spite of your best efforts, you'll have last-minute changes when scheduling employees. Employees get sick and have personal emergencies.

Be clear with your staff that it's OK for them to take sick days off of work. Some organizations have cultures where employees feel shamed or discouraged for taking time off to take care of themselves, and that's a health hazard in a place of business where people are preparing, cooking, serving and eating food.





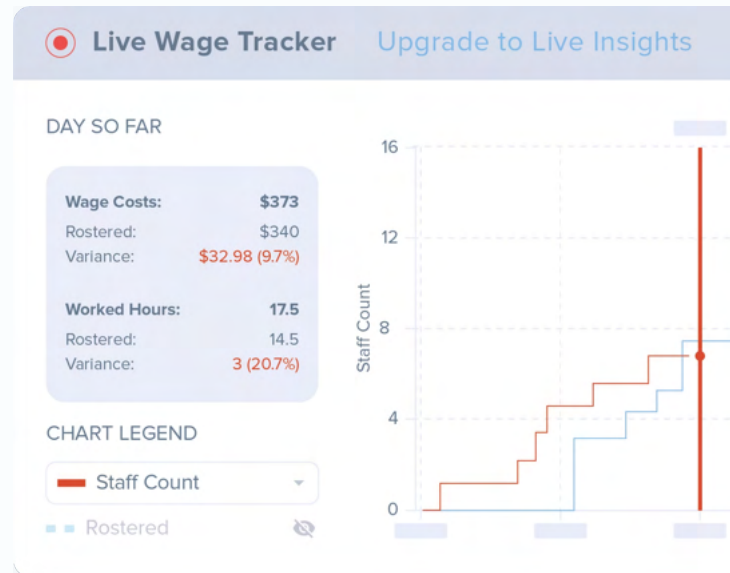
## Manage scheduling in real time based on changing conditions

The unexpected does happen occasionally, meaning that restaurant managers must be able to change their employee shifts at a moment's notice. Managers need a scheduling tool that allows them to react quickly and confidently.

The Workforce.com [Live Wage Tracker](#) allows managers to adjust staffing levels in real time. Both overstaffing and understaffing can be dangerous for a restaurant, which generally runs on small profit margins. Any staffing decision that can cut labor costs will help.

With the Live Wage Tracker, making operational decisions on the fly to tweak your restaurant employee schedule is as seamless as possible.

Meanwhile, for those food service businesses with multiple locations, you can get complete oversight of staff numbers in all teams and at all locations. You can see how many employees are currently working and which teams or locations have the largest variance from your shift schedules.





## Retail

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Effective retail scheduling isn't easy. Do it well and you'll engage your associates, reduce turnover, cut costs and build customer loyalty. But poor execution leads to lost revenue, disgruntled employees and inadequate customer service in many ways.

With the right processes, workplace culture, and shift scheduling software, you'll avoid employee scheduling conflicts and build the most accurate schedule possible. Customer loyalty rises as employee morale and productivity improves.

Here are best practices for employee scheduling for retail businesses.

### Build predictable schedules

Inconsistent schedules are a major complaint among retail workers. More stability helps employees balance the rest of their lives and responsibilities while still getting enough hours.

Plus, a [Harvard Business Review study](#) revealed that stable employee scheduling in retail actually builds productivity and profits. Researchers discovered that sales in stores with more stable scheduling increased by 7 percent and labor productivity increased by 5 percent.

Managers should consider the needs of their staff when building a schedule. It seems obvious but can be easier said than done, especially when managers get a handful of time-off requests.

While the retail industry can be unpredictable, store managers should avoid scheduling retail workers on short notice. Employees need time to plan for everyday needs like transportation and child care. Also avoid scheduling employees for "clopenings" — where an employee closes the night shift and opens the following morning. Too often employees are forced to get by on just a few hours of sleep between shifts. The Economic Policy Institute notes that irregular work hours, such as clopenings, [lead to longer work hours](#). Policies that reduce or eliminate clopenings and other unstable work schedules will lead to a more productive workforce while helping to avoid



unnecessary overtime. Perennial work-life imbalance is a proven detriment to stress and health. And in the retail industry, constant juggling of employee scheduling to maintain profits and keep labor costs to a minimum isn't really necessary.

When employers establish predictability in work schedules, it helps develop clear career paths for employees and provide more opportunities for training. Effective scheduling also is critical so that employees feel like they are supported and part of the organization instead of just punching a time clock.

While having a predictable schedule is better than scheduling on the fly, avoid manual timekeeping methods. They can be manipulated by employees to steal time and also are subject to wage-theft abuse by employers.

Using automated scheduling software is a great way to make it easier, more cost-efficient and less prone to fraud for a manager to handle this process. Managers can create and share work schedules for all employees to see on their phones, as well as send automated reminders to them before each shift.

Once a workable shift calendar is established, stick to it. And give employees plenty of notice if you plan to change what the average shift looks like.





## Adhere to predictive scheduling laws

Is your business in a jurisdiction that already has or will have predictive scheduling or fair workweek laws?

Employee scheduling laws vary by city or state, but they generally include four common provisions, according to the [National Retail Federation](#). They are:

- ✓ Advanced posting of schedules.
- ✓ Employer penalties for unexpected schedule changes.
- ✓ Record-keeping requirements for employers.
- ✓ Prohibitions on requiring employees to find replacements for scheduled shifts if they are unable to work.


Predictive scheduling dictates [advanced scheduling notice](#). In general, most require two weeks notice, but it can be more.

Violation costs can add up quickly. New York City, for example, [requires retail employers to pay \\$500](#) or damages (whichever is greater) for on-call shifts or shift changes with less than 72 hours' notice, according to the National Law Review.

If you're running a retail outlet in a city that isn't yet affected, don't wait for it to become law.

Fair workweek laws will continue to spread across the United States to protect shift workers, so stay ahead of the game by starting to make changes in your organization now.

Simplified and automated solutions such as Workforce.com's scheduling software assures that you'll avoid costly infractions and [comply with federal, state, and local labor regulations](#). You'll know exactly where you stand with predictive scheduling and fair workweek laws.



Bradley Smith 🕒 16		OG 07:00 16:00	OG 07:00 16:00		
Macie Todd 🕒 40	IM 07:00 16:00	IM 07:00 16:00	IM 07:00 16:00	IM 07:00 16:00	IM
Luis Michaels 🕒 32	SA 07:00 16:00	SA 07:00 16:00	SA 07:00 16:00		SA
Anderson Hill 🕒 40	OG 07:00 16:00	OG 07:00 16:00	OG 07:00 16:00	OG 07:00 16:00	OG
Christiana Ham 🕒 24		IM 07:00 16:00	IM 07:00 16:00		IM

Workforce Scheduling Software



## Allow employees to swap shifts

Store managers tend to spend a lot of time sorting and tracking employee time-off or shift cancellation requests. Last-minute scheduling changes also means managers spend valuable time off the floor to find a replacement.

A well-designed shift swapping policy can work for both sides and ensure that both the retailer and employees eliminate guesswork and get the staff scheduling they need.

Rather than bog down managers with scheduling headaches and leave employees to guess whether their shift is covered, allow your staff to swap shifts through an automated scheduling solution.

Any employee can request a [shift swap](#) in the Workforce.com mobile app. Assuming their manager approves the request, employees available and qualified for that shift will get notifications on their phones. Any of them can indicate in the app that they'd like to swap. When a manager approves the swap, the system automatically updates schedules, which everyone can see in the app.



## Improve clarity around retail employees' schedules

Retail employee schedules have been written out on paper or logged in an Excel spreadsheet for decades. It may be a tried-and-true method for some business owners but the only absolute tradition is that manual scheduling leads to confusion.

With pen-and-paper employee schedules, employees often are unaware of last-minute changes. There is no visibility since managers only post the schedules in a break room or near a time clock.

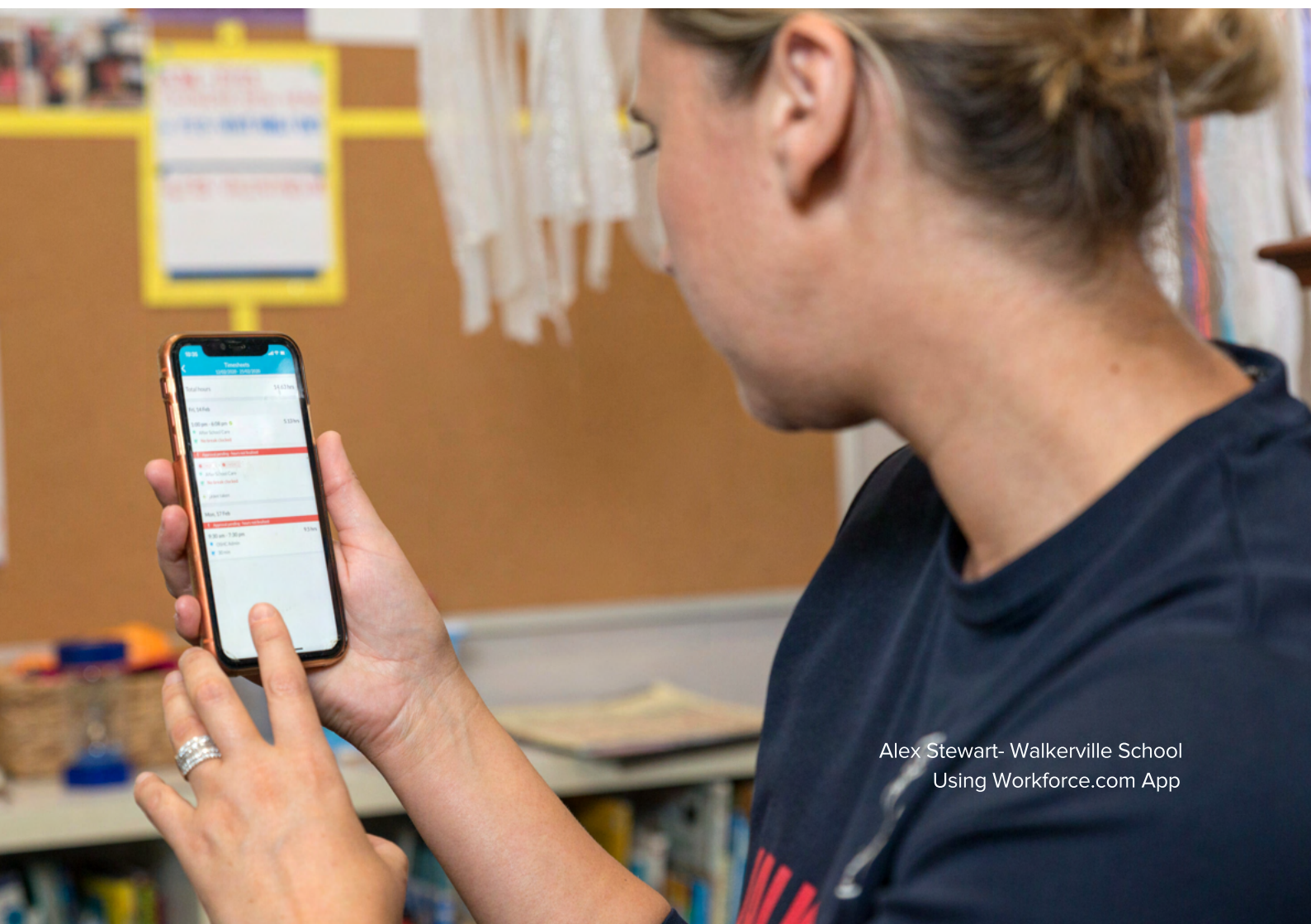


As you can imagine, there are unintended time and attendance violations that managers, HR and payroll must investigate and address. The lack of transparency in scheduling can also lead to disengaged employees who may think managers have a hidden agenda and that favoritism plays into their shift scheduling process.

Knowing whether you're overstaffed or understaffed and how resources are being managed is at best an educated guess and at worst a crapshoot.

An automated scheduling solution for retailers puts schedules online and visible for all to see. There's no need for last-minute phone calls or texts to see who is scheduled for that day's shift. Managers can easily see who's coming in, what time they're scheduled to start and which location they'll be at all from their phone.

With Workforce.com's [workforce app](#), retail managers keep lines of communication open with all of their full-time and part-time employees. Seeking employee input when possible can help them feel like they have a little more control over their schedules.



Alex Stewart- Walkerville School  
Using Workforce.com App



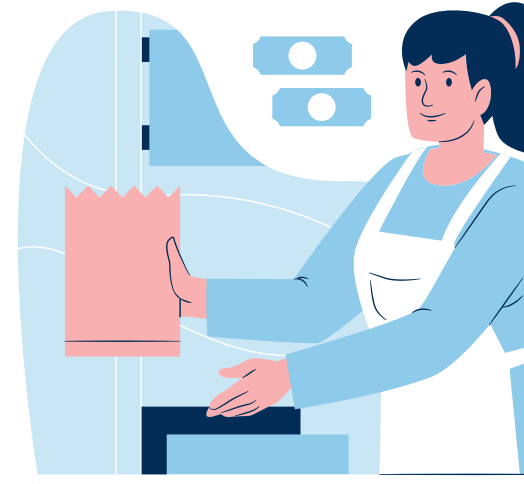


## Assess staffing needs to avoid overtime

Labor forecasting is a must when scheduling your retail workforce.

Predicting customer demand peaks and valleys to plan ideal staffing levels shouldn't be left to chance or a manager's gut instinct.

You may read suggestions that you determine the lowest number of staff required to run your store. "Begin with a bare-bones number and build from there," some expert may tell you. That is a fool's errand and completely unnecessary when you use effective labor forecasting and implement an automated scheduling solution.



According to the [Harvard Business Review study](#), "Practices such as having barebones staff in stores and unstable scheduling (schedules that vary on a day-to-day basis) have flourished in the guise of enabling greater profits for retailers.

"Researchers have found that retailers understaff during peak hours. Increasing staffing, they found, could increase sales and profits. And yet this message on the costs of lean scheduling fell on deaf ears."

Overstaffing and understaffing can be dangerous for any retailer, which typically runs on small profit margins and must monitor the company's labor budget. A staffing decision that smartly cuts labor costs while maintaining superior customer service benefits your bottom line.

Varying the types of employees that you schedule helps keep your full-time employees from accumulating overtime hours that can drive labor costs up. And allowing part-time employees to work alongside experienced full-timers provides valuable on-the-job training that they can't get anywhere else.

The Workforce.com [Live Wage Tracker](#) allows managers to adjust staffing levels to optimize profits.



## Health care facilities

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COVID-19 has highlighted the importance of treating health care workers well. A population of employees that was already at high risk of burnout, the pandemic has added even more pressure on certain medical professionals who must endure higher workloads, abide to stricter safety routines and witness the carnage of a pandemic.

Nurses are one group of these medical workers. Even before COVID-19, Burnout among nursing staff was a concern, with [one 2017 study](#) finding that nearly 50 percent of nurse respondents saying they have considered leaving the field for reasons such as feeling overworked, being swamped with paperwork and not feeling satisfied with their job.

Best practices to keep nursing staff engaged include deciding the right shift length for your workforce, hiring the right number of full-time versus part-time employees and determining if centralized or decentralized scheduling in nursing works for your organization.

### Centralized versus decentralized scheduling in nursing

With a centralized model, the organizations manage staffing and scheduling through one central office, while with a decentralized model, these decisions are made as an individual hospital or unit.

The decision between centralized and decentralized scheduling in nursing is partly based on geography and if the hospital system exists in one city versus many time zones, said Matt Stevenson, partner and leader of Mercer's Workforce Strategy and Analytics practice. A centralized model can work for a location or several locations in one city. It allows two locations from the same hospital system to use the same centralized staffing pool, and nurses can potentially move from one location to another instead of getting sent home if they're scheduled for an overstaffed shift.





There are also efficiencies in terms of how payroll. Financials and training are handled the same way across locations, he added.

However, this may not work if an employee has to drive long distances to get from one location to another, he said. That's why a decentralized model may work better for a hospital system that is multistate, rural or widely spread out.

In addition, from the cultural perspectives, many hospitals don't prefer a centralized model because they'd have less control and they'd be at the mercy of a centralized system for staffing needs, Stevenson said. If they don't get extra staff that way, they're out of luck. A decentralized model provides more independence.

### Forecasting patient census

There are different types of hospitals that may have different scheduling concerns, but one challenge they share is that they can't predict how many patients come through the door in a given day or how sick they'll be, Stevenson said. While hospitals can depend on some big-picture trends, they aren't always reliable, which causes a lot of stress internally.

If nurses are understaffed, that may mean that nurses are overwhelmed and overworked. If nurses are overstaffed, that may mean having to send people home without working or getting paid.

Systems are getting more sophisticated about forecasting patient census — how many patients are expected to come in during a given time period, Stevenson said. And those hospitals and health systems that do it better will help the morale of nurses and other health care workers, he added.







## Scheduling and managing full-time versus part-time nurses

Nursing organizations fall onto different parts of the continuum of mostly full-time employees versus mostly part-time employees, and having more of either can be advantageous for different companies, Stevenson said.

Full-time nurses generally stay at an organization longer, but hospitals must pay them more and give them a full-time schedule. Using more part-time nurses means more flexibility in the schedule but can also mean more turnover.

The challenge here is that each supports competing priorities — one financial and one operational, Stevenson said.

*“Finding the sweet spot of the right mix between full time and part time is really tough, and we find it different for every hospital,” he said.*

*“Those organizations that can figure out the sweet spot will win every time.”*

For hospitals trying to figure this out, the first aspect to consider is what the labor market looks like in the area. Are there more full-time or part-time options available?

Second, it depends on how the hospital is set up and how many recruiters and trainers there are on staff. With more part-time employees, there will need to be enough people to find, interview, hire, and train talent. A hospital may not be able to change the full-time to part-time ratio if the staff infrastructure of the organization does not support that new mix.

Finally, it depends on how a hospital sets up its nurses' shifts. Are they mostly six hour, eight hour, or 12-hour shifts? If a nurse works many shorter shifts, they tend to be part-time.



## How to set up nursing shifts

The length of shifts depends on factors such as the type of care nurses are providing and the age of the workforce, Stevenson said. In general, younger workers are more open to 12-hour shifts. Also, employees start to get burned out at hour 12, so caring for high-acuity patients with challenging medical conditions and unpredictable needs may not be the best option for them.

On the other extreme, four or six hour shifts present more opportunities for infectious disease to spread, he said. If a patient has something infectious, the fewer number of nurses who care for them in a given day, the less likely that will spread their infection to more people.





## Chapter 3:

# How to Prioritize Employees When Building Schedules

Employee schedules are the lifeblood of any operation and building them should involve input from the employees themselves.

These days, there's much emphasis on employees' life experience rather than just their experience as workers in an organization. With flexible working arrangements, the line between time for work and personal affairs are overlapping. Therefore, managers need to take into account their staff's priorities outside work and make sure that those are incorporated into how their work schedules are built.

Leave management is a crucial part of that. Employees should be allowed time-off and a seamless way to request for vacation days. At the same time, managers should have the platform to efficiently stay on top of those requests and make sure operations are covered while some employees are on leave.

Employee schedules should also be sent ahead of time so that staff can get their other affairs in order. This will help them juggle other responsibilities outside of work and help them plan accordingly.







## Simplifying leave management

Submitting a request for time off should be a simple, positive experience.

In most cases an employee seeking leave is looking forward to time away from the workplace. An employee's request to take time to relax and unwind shouldn't get bogged down in a bureaucratic morass of an overly complicated process, further slowed by multiple approvals and unnecessary paperwork.

Let employees know their vacation is approved before they even book their travel plans through an intuitive online time management solution. Managers and supervisors also will appreciate the solution's ease of use and rapid response so they can plan for that employee's absence weeks or even months in advance.

### Things to remember:



#### Clear the confusion

Too often employees don't know how much time off they have accrued or the amount they have left. Worse, managers are often in the dark about such employee basics as paid time off.

The employee approaches the manager to ask, "How much time off do I have left?" only to discover that the boss has no idea, either. Frustrated, both begin to search for an answer. Naturally it is either on a paper form tucked deep inside a hulking gray filing cabinet, or it is squirreled away among a previous manager's archived spreadsheets, which of course is in a folder on an inaccessible server.

A mobile leave management solution makes such confusion and aggravation a thing of the past. Employers and employees enjoy ease of use and spend their time on tasks much more important than digging through a bank of filing cabinets.



### **Time off at their fingertips**

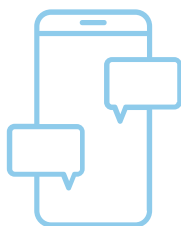
A fully integrated leave management system literally fits in their pockets. Managers will always know who is available to work any shift with a quick glance at their mobile phone.

Innovative leave management software supports both mobile and desktop applications and implements approved requests directly into an employee shift schedule.



### **Online leave management benefits**

Employers can customize leave management for multiple industries and global locations. Through quick implementation to the cloud, supervisors and employees also have a fair, transparent leave approval solution. Employers also increase their efficiency by shedding burdensome paperwork and save time and money by avoiding costly compliance complications.



### **Fair, transparent leave approval**

Whether your organization uses paid time off or traditional vacation/sick leave, employees submit leave requests using their mobile devices. Managers can then review, approve or modify the requests. With ongoing, updated tracking, employee and supervisor both have access to records, balances and proof of compliance. Tracking time off helps optimize labor management for all employees.



### Ease scheduling hassles

Every employee deserves time away from work, whether it is a weeklong vacation or a half-day doctor's appointment. But when that worker's time-off request is mismanaged it causes problems for the business, managers and fellow employees.

A simple, user-friendly mobile leave management solution is accurate, immediate and rebuilds the trust between employees and their managers that may have been damaged by a sloppy paper-based system.

Managers can see pending leave requests and check on employee availability, then make informed decisions on whether to grant or deny the time off.



### Remain in compliance

Lax adherence to tracking employee leave and ignoring federal and state Family and Medical Leave Act compliance is the fast track to a lawsuit. A user-friendly, effective leave management system helps clarify FMLA and other regulations with intermittent or continuous employee-leave tracking to avoid litigation and costly fines that typically come with noncompliance.

Efficient records of absentee, sick leave, annual leave and timekeeping translates into accurate compensation and an engaged workforce secure in the knowledge that their leave requests will not fall through the cracks. [A mobile leave management solution](#) benefits the employer as well as the employee.





## Posting schedules ahead of time



Predictive scheduling laws have changed the way many businesses make their schedules. While there are many details in these rules — like record keeping requirements and providing compensation for schedule changes — what people most talk about is employers' responsibility to provide employee schedules in advance.

The purpose of these laws is to give employees more predictability and stability, providing them a chance to plan ahead. If they know their work hours in advance, they will more likely be able to plan for a second job, child care or other responsibilities that must be planned.

Still, these laws mean that businesses must stay compliant with new regulations, and for employers with multiple locations across the country, they may have different rules to comply with. Regulations provide clear numbers on the minimum employers must do, but that doesn't mean they can't go above and beyond that.

The conversation around predictive scheduling will have to evolve because of changes in the business landscape, said Ari Hersher, partner at Seyfarth law firm. Employers can begin improving on the communication they have with employees.

"Employers should do what they can to communicate as far in advance about their anticipated schedule as possible," he said, adding that the clients he works with that are subject to predictive scheduling laws give up to 21 days notice on schedules.



Managers can communicate scheduling in advance and explain the flexibility needs of the business at the same time, creating an open line of communication between employer and employee.

“Employers can say, ‘We’ll give you 30 days notice, but please understand that our scheduling needs are volatile,’ ” he said. “People should [try to] understand each others’ needs and be mindful of them.”

David Kopsch, principal consultant at Mercer, agreed that giving more notice will benefit employers right now. The return-to-work environment is stressful. Employers must create employee work schedules without knowing what sort of customer demand to expect, and some employees may be fearful to return to work in a customer-facing job.

Organizations can provide schedules to employees up to four weeks in advance, Kopsch said. From there, they can call and confirm with employees three weeks in advance, make whatever changes necessary and officially post the schedule two weeks ahead of time, which would allow employers to comply with any of the predictable schedule laws.

“We are seeing much more communication coming from employers, and what employers are sharing with us, employees like it,” Kopsch said. “They like this high level of communication. They like the engagement and the concern and empathy that employers are demonstrating.”





## Chapter 4:

# Employee Scheduling Techniques

Employee schedules are ever-changing. A business may need 100 hours this week and may need more or less in the following week, depending on a myriad of factors.

To be agile and cost-effective, companies need leading techniques and smart, automated solutions to optimize employee schedules.

## Avoiding understaffing or overstaffing through real-time wage tracking technology

While restaurants brimming with patrons and retailers bustling with shoppers are energizing images, employers must keep a level head when staffing their locations. Whether it's reviving a dormant construction site or setting up the outdoor patio for a busy weekend brunch, a real-time wage tracker solution will help employers avoid the common mistake of overstaffing their workplace and spending too much on labor costs.



### Understand your wage spend

Business owners want to keep patrons coming back whether they are grabbing a meal or leisurely shopping for a new pair of shoes, which means more foot traffic in the door.

Correctly staffing your location is crucial to profits as well as customer satisfaction. That can be as simple as consolidating employee data currently logged in varying systems and spreadsheets into a single online platform. Merging your employee data with the technology to track wage costs in real time and adjust staffing levels can avert the nagging issue of being overstaffed or understaffed.





### **Beware of peaks and valleys**

All organizations have their rush times and slowdowns. Think strategically and incorporate software solutions for those periods but also remain flexible for the unexpected. Some ideas to consider:

- ✓ Denote peak seasons and hours versus slow seasons and hours to determine how many employees are needed.
- ✓ Give employees schedule preferences, reasonable time off and the holiday schedule.

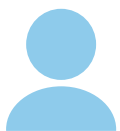
Distribute advanced schedules to head off any conflicts or unforeseen circumstances.



### **Avoid overstaffing**

Eager employers don't want to be left short-staffed. Wage tracker software helps eliminate erring on the side of caution and adding more people than are needed, which cuts into the company's profits.

There's also a dirty little secret when it comes to the cost of overstaffing. Employees hate getting cut once they show up and also dislike standing around for hours on end with nothing to do. Either way, employees will complain that their time was wasted by a boss who scheduled too many employees. Do it over and over and you've provided them the time to search their phones for other employment options.



### **Avoid understaffing**

When the workplace is short-staffed, employees complain that they are constantly on the run and overworked to the point of exhaustion. That leads to poor quality of work, high levels of stress and increased absences. There will be higher overtime expenses, which can result in a more costly alternative than hiring additional employees full time. And like overstaffing, short-staffing a workforce leads to employee turnover, too.



**Keep  
employees  
happy and  
cut costs**

Make employees happy and fairly compensate them for the work they do. Effective wage-tracker software will prompt managers that wage costs are higher than expected so they can make adjustments throughout the day to successfully run their shift. The wage tracker platform's built-in wage calculator monitors real-time costs, staff count and where employers may be overspending per shift with up-to-the minute reporting.

The result will be a savings in wage costs and a drop in unnecessary overtime. You'll also notice a more satisfied and engaged workforce.

As organizations ramp up their staffing, this is the perfect time to incorporate [live wage tracker software](#) to empower managers with the tools they need to accurately and fairly compensate employees and assess staffing levels in the moment and at a glance.

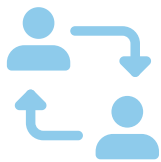




## Shift swapping: Help managers and employees to take charge of scheduling

Shift schedules are the lifeblood of an hourly workforce, and shift swapping is a necessary tool for employees and managers to maintain both consistency in staffing levels and a vibrant, engaged workforce.

Here's how you can effectively integrate shift swapping in your operations:



### **Accommodating a shift swap**

Shift swapping is supposed to be simple, but it can be complicated and counter-productive without rules on how it would be implemented.

Establish a written policy on shift swapping that provides clear guidance to staff while simultaneously ensuring the organization's needs are met. Make sure the policy is clear and easy to understand. Don't overcomplicate it; the simpler the better. Implementing an easy-to-use shift swapping software simplifies the process, which can otherwise bog down into an arduous, overly complicated back-and-forth among employees that wastes everyone's time.





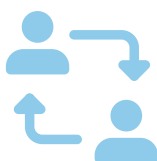


## Benefits for employers

A manual, paper-based shift swapping policy that relies on employees scrambling to cover for each other is a risk at best and a chronic, chaotic scheduling disaster waiting to happen. Managers play an integral role in closely monitoring shift swapping. Their oversight assures that every shift will be fully covered.

Through innovative workforce management technology, managers can approve shift swaps with complete oversight of costs and compliance. The technology empowers managers to:

- ✓ Control staffing levels — eliminating understaffing and overstaffing.
- ✓ Monitor so staff members swap shifts with colleagues who have similar skills and experience.
- ✓ Lower the potential for no-show employees.
- ✓ Reduce overtime.
- ✓ Create a deadline for shift swaps.
- ✓ Distribute unwanted shifts fairly and evenly among all employees.
- ✓ Customize to control cost, employee availability, qualifications and fatigue management.



## Benefits for employees

Employees have lives away from work, and there are times when they need to get a shift covered due to family issues or a sudden illness. If the shift is claimed, the employee will be free to take the day off. If not, the employee remains responsible for the shift.

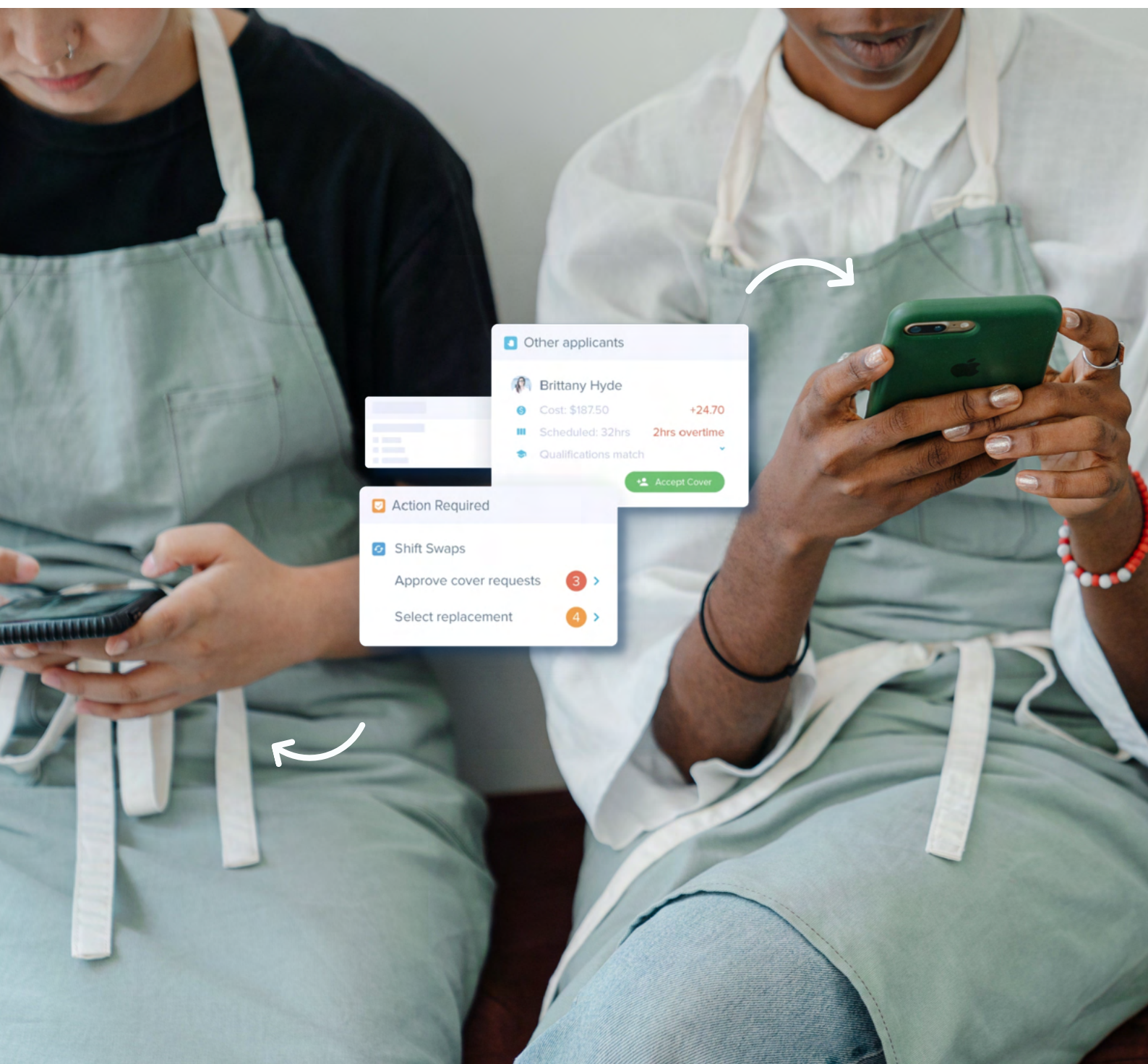
Shift swapping software allows employees to:

- ✓ Post the shift for all fellow employees to see.
- ✓ Control their own schedules.
- ✓ Get a shift covered quickly and easily.
- ✓ Create a more complete work/life balance.
- ✓ Build camaraderie and teamwork through communication.
- ✓ Earn additional money by picking up extra shifts.



With the freedom that employees will enjoy through shift swapping technology, managers still control the approval process and hold the power to override a shift swap in case a specific exchange is seen as unworkable or create unnecessary costs. Shift swap software allows managers to prevent employees from constantly posting their shifts and become a stand-in for requesting time off.

Finally, misunderstandings over a missed shift will be avoided. Shift swapping technology can put the responsibility to fill the shift squarely on employees to manage. Managers can OK the swap, leaving them with more spare time to do things other than administrate the employee schedule.

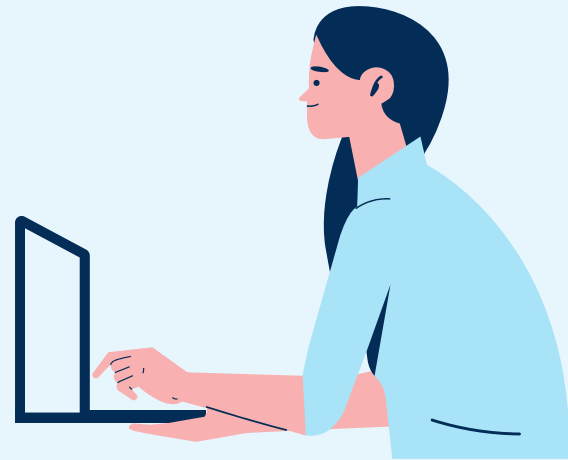




## Chapter 5:

# Scheduling With Tech Solutions

Shift scheduling can be tedious and time-consuming, but the right tech tools can streamline the process.



Comprehensive employee scheduling solutions give managers immediate insight into how many staff members to schedule at any given time and optimizes planning breaks, setting vacations, adding time for training, and addressing unplanned absences. A streamlined scheduling plan also cuts the time associated with onboarding new staff members to full productivity.

Here are some of the reasons why employee scheduling software is a must for businesses.

## Employee scheduling software saves time and money

The old Benjamin Franklin adage of “time is money” is as true today as it was in ol’ Ben’s era. It certainly applies to scheduling the right employee into the right slot.

Whether it’s a 12-hour on-floor hospital shift or a four-hour lunch rush slot, scheduling software is a time-saver when it comes to matching an employee’s skills and availability to the proper shift. Managers will have a real-time schedule that changes with the organization’s needs. Scheduling software also removes the labor-intensive task of constantly rebuilding a schedule to free you up and your staff for other opportunities. In other words, you are saving up Benjamins by freeing up your time.





## Employee scheduling software streamlines the process

Saving time is important, and scheduling software helps you make better use of that time. All schedules can be created and distributed electronically, and employees can use their phone to clock in and out, eliminating the need for onerous back-and-forth emails or missed phone calls.

This also puts much of the responsibility on the employee to communicate a potential absence or shift swap. Such functions turn the stress of scheduling employees into an HR department win.

## Employee scheduling software avoids unnecessary labor costs

A 2017 Quickbooks survey found that 49 percent of employees admitted to time theft, which annually costs companies more than \$11 billion. Scheduling software tools cut down on fraud that may be taking place in your company.

Overtime, while often unavoidable, is another opportunity to save money through scheduling software. You have enough people to get the job done, but not so many that you're cutting into the bottom line. Scheduling software provides the tools to cut costs in the form of unnecessary overtime by showing which employees are eligible for overtime assignments and who already clocked too many overtime hours.





## Solving scheduling with technology

Employee scheduling software and solutions is no longer “good to have.” It’s a must for thriving businesses.

The best employee scheduling software is not just comprehensive, but it should be integrated with other solutions that ensure seamless workforce management. Workforce.com’s solution is exactly that.

Workforce.com is helping organizations of different sizes in different industries become more productive and cost-effective, improve quality of service, and engage their workforce better.

See how Workforce.com is simplifying time and attendance, employee scheduling, payroll processing, labor compliance, and workforce analytics and reporting for companies around the world. See our platform in action and [book a demo](#) or [start a free trial](#). 