

Workforce Management The Benefits of Utilizing a Scheduling System

Is your company making full use of your workforce management software's scheduling capabilities?

Santoni's Marketplace & Catering found themselves asking this same question as they contemplated investing in a new time and attendance system. As a specialty market and the seventh largest caterer in Baltimore, employing more than 160 people and being approved in over 73 event venues throughout the state, Santoni's Marketplace & Catering had a desire to continue expanding. To do so, they felt that their time clock system should do more for them than just help with payroll efficiency; they wanted a system that could help them better manage employee schedules and thus, their labor costs and compliance with labor laws.

A good, base scheduling system enables employers to track schedules for individuals or groups of employees, and can support unlimited definitions of shift schedules, patterns, and rotations to account for all of the different scheduling situations within a company. The solution should accommodate any cycle length and schedules should be able to be programmed to be copied or repeated for an indefinite amount of time. Furthermore, scheduling systems should work in conjunction with time and attendance systems to track employee exceptions and leave. Santoni's Marketplace & Catering took this information into account when looking for a complete workforce management solution.

One important factor to consider when planning a company's schedules is resource requirements. Though this may seem like common sense upfront, it can quickly become very complex. In Santoni's Marketplace & Catering's case, they obviously do not need to schedule as many staff for a small event as they would for a large function. However, for each event, the number of employees required before the event to set up, during the event, and after the event can vary by quite a large margin. Moreover, the types of employees needed at each stage of the event can differ as well. Scheduling appropriately can help control of any unnecessary labor costs.

The opposite can also be true; a proper schedule ensures that there are enough resources scheduled to successfully carry out the functions of a business. Companies of all sizes, from those with fewer than a hundred employees to those with thousands of personnel, can run into difficulties with under-scheduling. Without a centralized and easy-to-understand system, it can be difficult to identify resource gaps in company schedules, but a workforce management system can help. A good solution highlights any open shifts during the work day that are not assigned to an employee. Advanced scheduling solutions will notify the appropriate individuals when an open shift occurs (such as when an employee unexpectedly calls in sick) and can even automatically contact employees (by phone, email, or text message) to fill that open shift. Employees can accept or reject the opportunity to work that open shift, and the supervisors and managers of the company are duly notified.

In addition to the number of employees needed, scheduling often must take into account environments where certain certifications or training is required. For example, in a hospital, not just any employee can be called in to fill an open nurse shift. Without keeping separate records of qualifications within the hospital, it would be impossible to remember if the employee that is called in to fill a shift is a registered

nurse or a registered dietitian. A centralized workforce management system can keep track of all that information in one location and use that information to drive requirements when looking for employees to fill a schedule. Scheduling solutions can set a period that certifications and qualifications are valid and will remind the employee and employer when they are about to expire. Advanced scheduling solutions will take into account these certifications and will only contact those qualified individuals when attempting to fill open shifts. Scheduling solutions also enable employees to exchange or swap shifts, for situations when the employee knows early enough that they will not be able to work the shift.

However, even with the proper planning and a finalized schedule, issues can still arise if the employee does not remember which shift they are assigned to. Operations that have rotating shifts or non-repeating schedules may run into the problem of employees missing their scheduled shift or showing up for shifts at the wrong time. This is especially common when schedules are in paper format and displayed only in the workplace. Employees may not be close enough to stop by to check the schedule or he/she may believe they can remember their scheduled time.

Workforce management and scheduling solutions can help you avoid this situation. Since the information is all in a centralized location, employees can simply go onto the internet to view their schedules or call into an automated phone system that is updated in real time. Paper timesheets can be confusing and a hassle when employees change shifts. It can be difficult to keep track of the new schedule as well as if the employee obtained the appropriate permission to exchange shifts. Scheduling systems can require a note to be given in order to keep an audit trail of the changes being made to the schedule. Proper levels of authorization are also built into the system. Furthermore, employees can submit time off requests directly from the website or their mobile device and the system tracks whether these requests are approved or denied.

Organizations that do not have a single, centralized location can also encounter problems when attempting to track time and attendance of their employees. Lifehouse, a Northern California based company, became aware of these scheduling difficulties as their company began to expand. Lifehouse is a non-profit organization that serves the Northern California community by offering special education and community support to individuals with developmental disabilities. The employees of Lifehouse do not work in one location, but are instead assigned to meetings at different locations around the community or even family homes. Trying to schedule employees in each location had proven to be difficult and thus, implementing a time and attendance system with advanced scheduling was a logical choice for Lifehouse. Because the system automatically generates schedules based on resource requirements and tracks the location of each employee, Lifehouse has seen much more efficient scheduling and accurate time tracking.

The information and benefits that come with time and attendance tracking with schedules cannot be understated. When utilizing schedules in conjunction with time tracking, employers are empowered with exception tracking. Workforce management systems now enable employees to clock in and out of work through their smartphones, via native mobile apps or the web browser, or call into an automated phone system if a computer is not present. This enables managers to easily keep track of their employees even when they are working at various locations throughout the day, week, or pay period,

and also provide employers with a lot more information. When schedules are utilized in workforce management solutions, the system can track employee absences, tardiness, and when employees are working outside of their scheduled hours. With real-time systems, system users are presented with this information immediately and can therefore make timely decisions. When analyzing company attendance trends, reports can be generated to see which employees are consistently clocking in late, taking extended breaks, or clocking out early (as is often the case on Friday afternoons), the amount of minutes early/late, and the days that these exceptions occur on. Reports can be customized, saved, scheduled to run at defined intervals or on-demand.

A workforce management system can track not only absences and tardiness, but with scheduling capabilities, the system can also assist with controlling overtime, a major cost that all companies look at. When utilizing schedules with time and attendance, employees can be locked out from punching in and out outside of their scheduled shift start and end times. If an employee works, they must be paid; however, a system lock-out enables employers to identify these overtime situations and address them appropriately.

Another benefit to adding a scheduling system is compliance with local, state, and federal labor laws and mandates. Examples include setting up rules regarding the rounding of employee time, tracking employees taking long or short breaks and meals (there are system lock outs to discourage this), and again, the tracking of overtime. Parameter-driven workforce management solutions are flexible and can be programmed to comply with labor laws wherever a company may be located and can adapt, should these laws change in the future.

In conclusion, the addition of a scheduling system can help streamline a company's scheduling by tracking the resources required, the shifts employees are working, employee qualifications and certifications, identifying any lapse in employee coverage, and filling these lapses. Furthermore, when combined with time and attendance, companies are empowered to identify attendance trends, better control labor costs, and comply with labor laws and mandates.

Not all companies' scheduling needs are the same—they can range from extremely simple to incredibly complex. Similarly, not all workforce management scheduling systems are the same—they can range from extremely rudimentary to incredibly powerful. But with all of the benefits a scheduling system provides, identifying the appropriate solution seems to be more a necessity of a successful business, rather than a modest recommendation.