shiftboard.

4 Steps to Employee Scheduling:
How to Best Schedule Hourly Workers

Complex. Fast moving. Highly skilled employees. This is a modern shift-based workplace. In these environments, making the right employee schedule is critical as it ensures the right resources are in the right place at the right time. It also impacts labor costs, productivity, and even legal compliance. Scheduling serves as a key connection point to employees. The quality with which employee schedules are planned, published, and communicated impacts worker satisfaction and turnover.

Step 1: Creating the Employee Schedule

The master employee schedule defines what resources are needed, when, and where. Though a published master schedule is specific to a particular scheduling period, proper planning requires looking well ahead to assess demand and resource supply, especially when needs vary. Done well, the master schedule will help lower labor costs by matching resources to demand. It will also help reduce the need for shift changes downstream. And since staff scheduling is an inherently repetitive process, it is easy to simply repeat what was done before.

☐ Determine resource needs

You must understand what you need before you can fill those needs. Since everything is based on the master schedule, this is one of the most important steps to get right. You'll want to:

☐ Determine the resources needed for each role by location and shift duration.

☐ Identify trend you can apply to current planning efforts.

☐ Plan for future events ahead of time.

☐ Define any required qualifications for each shift.

☐ Assess resource pool

Once you understand what you need, it's time to assess whether your employee pool and resources are big enough to fill upcoming demand. Here are a few factors to consider:

☐ If the resource demand is fairly static, look ahead to identify upcoming events that may impact employee availability.

☐ Assess capacity by role, location, and availability. Factor in a margin of error to keep the assessment fairly straightforward.

☐ If nonpersonnel resources are in the mix, that should be on the schedule too.

☐ Define scheduling rule

Regulations, policies, and processes all drive how you schedule. Seniority, overtime status, location, and certifications are common examples of factors that can trigger special rules that schedulers must observe when assigning shifts. Rules can vary greatly and can be unique to your organization, so clearly defining them is important to ensure all managers understand the guidelines before assigning shifts.

Step 2: Assign Employee Shifts

Now that your employee schedule is mapped out, it's time to fill the open shifts. If your master schedule was built correctly, then places and times should already be determined, and you can focus on selecting the right people.

☐ **Put people in the right places**

Assigning employee shifts can be time-consuming depending on your workforce size, scheduling complexity, and level of automation. To maximize your results, consider these key criteria:

☐ **Approach** Are your shifts assigned by managers, requested by staff, or something in the middle? Though not always practical, bottom-up scheduling, where staff choose open shifts they're qualified for, is a proven approach to drastically reducing scheduling effort while increasing employee satisfaction and retention.

☐ **Qualifications** Use the defined skills and competencies criteria to ensure any employees assigned to a shift meet the requirements for it.

☐ **Scheduling Rules** Apply all defined scheduling rules. You may need to consider seniority, or you may have rules related to overtime.

☐ **Availability** Identify who is available to work that shift.

☐ **Preferences** Take employee preferences into account.

☐ **Costs** Compare scheduled resource cost with your forecast.

☐ **Employee Performance** Sometimes you need your best people on the job, but identifying them can be difficult, especially in large or complex organizations where staff may fill multiple roles.

Step 3: Manage Change

No matter how perfect your schedule is when published, any seasoned scheduler knows what comes next—frequent tweaking, from the day it's published through the last day it's active.

☐ **Be prepared for schedule changes**

Effective change management means quickly and efficiently addressing developments and having real-time communication with your workforce. Keep a close eye on the following common reasons for schedule changes:

☐ **Demand Swings** Throughout the scheduling period, your labor needs may go up or down. Standby pools, made up of part-time and/or contingent workers who can work on short notice, are a popular solution for managing surges.

☐ **Changes to Employee Availability** This is often a prevalent driver of schedule changes. Many organizations put the onus on employees to identify a suitable replacement once the schedule is posted. This can have mixed results. Scheduling software that provides shift-swapping capability allows employees to post and accept open shifts in real time. Managers can configure this workflow to automatically process changes or require approval as needed.

☐ **Employee No-Shows** Reacting to same-day situations, such as employees who are ill or fail to show up, is stressful. Call lists and text messaging often won't find you a last-minute sub quickly. Develop a "hot standby" pool made up of a small number of highly flexible employees who can jump in at a moment's notice.

Step 4: Meausre, Learn and Adjust

The end of one scheduling period means a new one is about to start. Such transition points often serve as triggers for payroll and numerous operational reports.

☐ **Step back and assess**

Despite the repetitive nature of scheduling, it is critical to periodically review scheduling processes, employee feedback, and business KPIs. This should involve stakeholders from lines of business, human resources, and finance. Make sure to include the following areas in your review:

☐ **Forecasting Accuracy** Comparing forecasted to actual resource demand is a key review point. As a scheduler, you have a unique perspective. Use it to review variances and collaborate across your organization to improve forecast accuracy. A seemingly small improvement can have a significant impact on your business.

☐ **Evaluating Resources** It is critical to monitor and measure the health of your resource pools. Take into account time period and expected demand when reviewing employee availability. For example, noticing a spike in overlapping vacation requests will help you proactively adjust the schedule. Also, monitoring resource pools tied to mission-critical roles will help ensure you are continually filling them with the best t alent. If you are using scheduling software, you have a rich source of data to tap, from skill ratings to attendance data.

☐ **Scheduling Processes** Review key processes with other schedulers, management, and employees and regularly test any improvement ideas. In shift-based work environments, the schedule has a huge impact on employee productivity and morale. Employee feedback will uncover opportunities that may be difficult to see from a scheduling perspective.