



Employee Scheduling:

How to for Managing Hourly Workers

A Best Practices Guide to Lower Costs & Improve Employee Satisfaction



Employee Scheduling Is a Strategic Process

Complex. Fast moving. Highly skilled employees. This is a modern shift-based workplace. In these environments, making the right employee schedule is critical because 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, “no-shows”, and turnover.

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Employee turnover is **174% more** likely without real-time scheduling capabilities.

-BERSIN BY DELOITTE



That's a lot riding on your employee schedule, and this guide is here to help. You'll learn about best practices and supporting processes to approach employee scheduling more strategically to create better schedules. This guide breaks the scheduling process down into four key phases that apply to most work environments. That said, not every proposed strategy fits every circumstance, so incorporate what best fits your employee scheduling workflow.

Create Master 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.

Here are three steps that will help you gain a strategic view of the process:



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. For example, a hospital may need four nurses and two CNAs in Pediatrics from 8 a.m. to 6 p.m. There are countless ways to define a location (e.g., hospital floors or event booths), so it must be done clearly and consistently. You can organize this in many ways, such as a grid on a whiteboard, in a spreadsheet, or using online scheduling software.
- ☐ Identify trends you can apply to current planning efforts. For instance, there may be a pattern of underscheduling a particular role or shift. Reviewing data from past scheduling periods can help you anticipate needs.
- ☐ Plan for future events ahead of time. Consider an approaching summer holiday and how it may require more lifeguards on duty.
- ☐ Define any required qualifications for each shift. As an example, even though you already determined you need four nurses for a shift, one might also need to be fluent in a certain language.

Employees with the ability to manage schedules in real time are **6X more** satisfied than those without.

-BERSIN BY DELOITTE

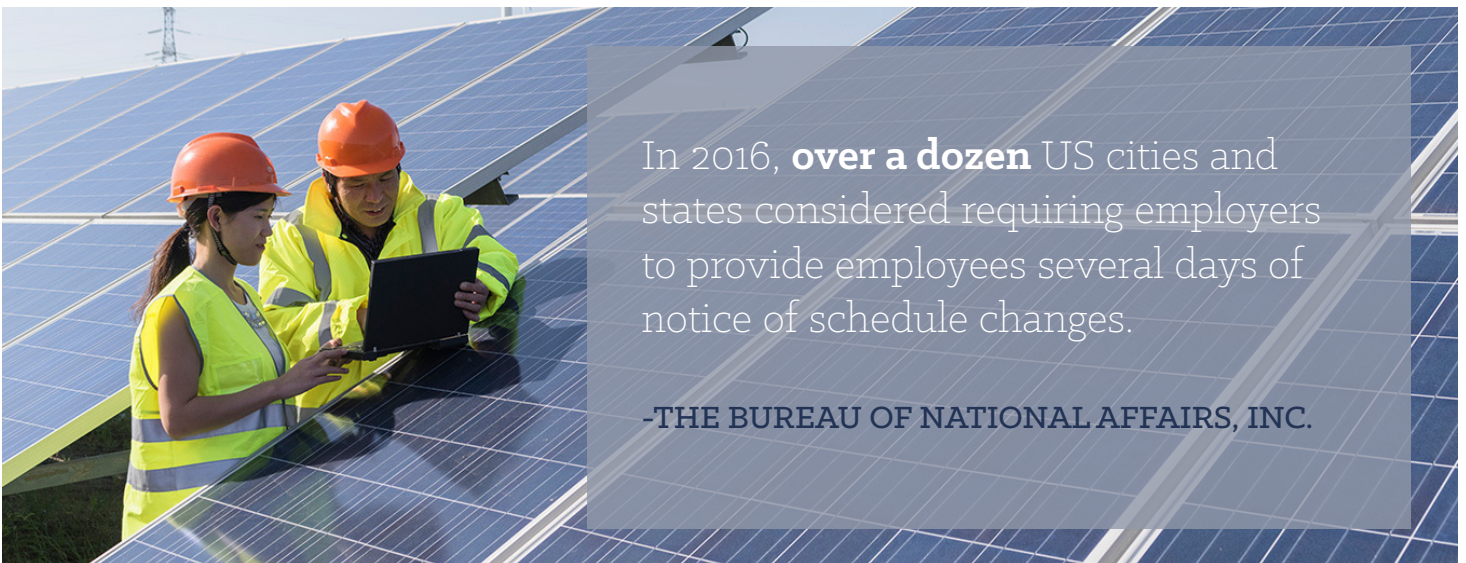
ACCESS RESOURCE POOL

Once you understand what you need, it's time to assess whether the resources you have map to those needs and whether your employee pool is 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. For example, a three-day weekend may be fast approaching, so your labor pool may be smaller than normal.
- ☐ If you are forecasting a significant increase in resource needs, then you will likely need additional analysis. Assess capacity by role, location, and availability. Factor in a margin of error to keep the assessment fairly straightforward. For example, if you estimate for 20% beyond expected needs, and plan accordingly with additional staff recruitment and on-boarding, you can rest easy knowing that you have the staff you need. To learn more about how Shiftboard approaches the process of applicant recruitment and on-boarding, [click here](#).
- ☐ If nonpersonnel resources are in the mix, that should be on the schedule too. For example, if a security firm provides vehicles for their guards to make rounds, the vehicles should be added to the shifts on the master schedule.

DEFINE SCHEDULING RULES

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.



In 2016, **over a dozen** US cities and states considered requiring employers to provide employees several days of notice of schedule changes.

-THE BUREAU OF NATIONAL AFFAIRS, INC.

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 THE RIGHT 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 employees with expired credentials can present significant legal risk, so you'll want to confirm employees are in good standing before assigning them to a shift.
 - ☐ **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. From vacation requests to leaves of various kinds, employee availability issues are the #1 driver of schedule changes. Using a tool that shows you real-time availability can make all the difference.
 - ☐ **Preferences**
Take employee preferences into account. You will reduce change requests and, more importantly, improve employee satisfaction while lowering absenteeism and turnover.
 - ☐ **Costs**
Compare scheduled resource cost with your forecast. The difference between actual cost (including overtime) and the forecast may surprise you. If labor cost is a key driver, model how cost changes with a different mix of resources.
 - ☐ **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. Track performance ratings so you know who to schedule when it matters most.
- Review the schedule to ensure all the factors above are considered. Poor scheduling can have major consequences for your business. It's easy to miss things, even with fairly straightforward schedules. In high-stakes environments, develop a formal process to review costs, compliance, and any other key drivers.
- Publish and communicate the schedule so that everyone impacted by it knows where and when to find it. Online scheduling solutions ensure everyone will have anytime, anywhere access to their schedules, including any changes.

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.

SCHEDULING NEVER STOPS

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. Declining demand can be more challenging. If you have a sizeable and flexible standby pool, you can staff the last 10-15% of normal schedule needs with surge staff. This provides a buffer for both increases and decreases in demand.
- ☐ **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. To learn more about how Shiftboard approaches scheduling changes, [click here](#)
- ☐ **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. These pools often include part-time staff, contingent workers, and even full-time employees who are hungry for overtime opportunities.

The good news is that since most schedule changes stem from the three causes above, you can manage them more efficiently with the right process automation.

Targeted, real-time communication is also vital to effectively managing change. The popularity of smartphones makes text messaging an important tool for connecting with employees. Make sure both managers and staff have 24/7 mobile access to schedules, so they can instantly interact and adjust on the fly.

Organizations with predictable scheduling are **53% more** likely to experience lower turnover than their industry average.

-APTITUDE RESEARCH PARTNERS

Measure, Learn & 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 talent. 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.



Companies that effectively automate workforce management can reduce unplanned overtime costs to **below 4%** and worker productivity can **increase by 12% on average.**

-ABERDEEN GROUP

The Role of Technology


Employee scheduling software excels at making the scheduling process more efficient to manage. It can also help ensure compliance with the myriad rules and regulations that impact shift-based workplaces. Most software is cloud based and sold as a yearly or monthly subscription service. Consider the following capabilities when making your selection:

- ☐ **Resource Forecasting**
Accurately forecasting resource needs is essential because the entire schedule is based on it. Tools such as Shiftboard's Demand Planner leverage sophisticated algorithms to forecast resources based on historical patterns.
- ☐ **Rich Profile Configuration**
You likely have extensive information on your employees that you need to leverage in scheduling and reporting, including their role, job-level, seniority, pay rates, and availability preferences. Ensure your scheduling software can accommodate your employee profile data.
- ☐ **Shift Assignment Automation**
Assigning shifts is typically the most time-consuming portion of the process. Manually matching people with positions is tough, and keeping all the details straight is a challenge. Look for the ability to auto-assign shifts based on a variety of rules. Advanced features such as shift swapping and automated standby filling are also often highly desirable.
- ☐ **Communication tools**
Providing employees access to the schedule and communicating any changes are both critical. Combining the power of scheduling software with mobile technology provides your workforce 24/7 access and enables real-time communication via text messaging.
- ☐ **Integrated Time and Attendance**
If your workplace does not use a time and attendance software application, then ensure your scheduling software service allows for this add-on functionality.
- ☐ **Analytics and Reporting**
The right scheduling software will collect the data you need to assess and reveal insights to help you optimize the scheduling process.
- ☐ **Integrations**
In many workplaces, the schedule is the key daily operations. Scheduling software can be integrated with payroll and human capital management systems to automate business processes.

If you're considering scheduling software, we'd love to talk. Our experts are here to help. We've learned a thing or two from helping to schedule millions of shifts across nearly every industry imaginable.

Thank you for reading this guide. We hope you found some helpful insights and best practices to apply to your own scheduling efforts.

TO FIND OUT HOW SHIFTBOARD'S SCHEDULING SOFTWARE EMPOWERS STRATEGIC SCHEDULING CHECK OUT OUR **PRODUCT PAGE**.

A photograph of three men in an office environment. One man in a red and white checkered shirt is leaning over a desk, shaking hands with another man in a blue shirt who is seated. A third man in a blue shirt is standing behind the seated man, smiling. The background shows a modern office with large windows and a white lamp.

Organizations with automated scheduling report nearly **2x greater** increase in revenue per employee than those that don't automate.

-APTITUDE RESEARCH PARTNERS