7 Steps to Successful Staff Shift Schedules



"Organizations that provide predictable schedules are **174% more likely** to have an engaged workforce."

– HR Insights



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FORECAST YOUR STAFFING NEEDS

- What work must happen? When? Where?
 - Gain insights from past scheduling periods
 - Consider upcoming events, like holidays
 - Itemize staffing by role, location & time



ASSESS ABILITY TO MEET FORECAST

Is your workforce too big, too small or just right?

- Assess demand vs. capacity by role and location
- Gauge impact of worker vacations and sick days
- Use scenario analysis to plan for the unexpected



DEFINE SCHEDULING RULES

What goals need to be considered?

- **y**
- Prioritize business goals such as limiting overtime
- Identify policies and laws that impact scheduling
- Be sure worker certifications are up-to-date



Regular schedules can reduce work-family conflicts from **26% of workers to 11%**.

Policy Institute



CREATE A WIN-WIN

Does the schedule support all business needs?

- Allow workers to pick shifts
- Take staff preferences into account
- Reward versatility and performance



FINALIZE PUBLISHING

What are the finishing touches?

- Apply rules from step 3
- Iterate: try, test, tweak
- Over commiunicate schedule when published





In 2016, over a dozen states and cities considered legislation to require extra pay for employees given last-minute work schedule changes.

- Bloomberg BNA





"Organizations with lower than industry average turnover were **50% more likely** to utilize tools to help them manage employee workload."

– Aptitude Partners



STEP BACK TO LEARN

What can you do better next time?

- Compare what happened vs. forecasts
- Get feedback from employees
- Review process glitches that occured





Learn more about scheduling shift-based workers with Shiftboard's guide.



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Employee Scheduling: Shift-Based Workers



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🔁 Build the Schedule

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EXPECT THE UNEXPECTED

- How do you prepare for change?
- Review schedule daily
- Offer shift trading
- "Day-of" headaches will always occur

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