



Build the Schedule

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

— HR Insights

1

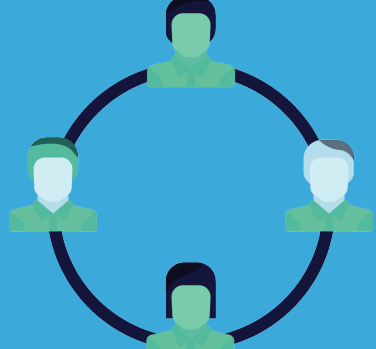


FORECAST YOUR STAFFING NEEDS

What work must happen? When? Where?

- Gain insights from past scheduling periods
- Consider upcoming events, like holidays
- Itemize staffing by role, location & time

2



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

3



DEFINE SCHEDULING RULES

What goals need to be considered?

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

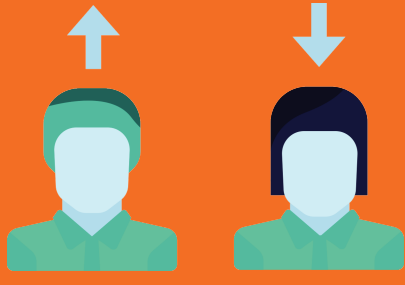


Assign Shifts

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

— Policy Institute

4



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

5



FINALIZE PUBLISHING

What are the finishing touches?

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



Manage Change

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

— Bloomberg BNA

6



EXPECT THE UNEXPECTED

How do you prepare for change?

- Review schedule daily
- Offer shift trading
- “Day-of” headaches will always occur

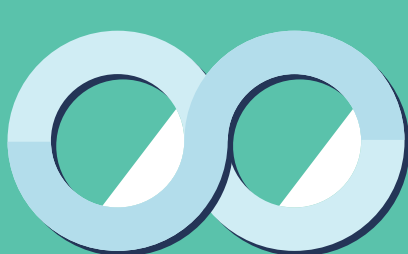


Measure, Learn & Adjust

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

— Aptitude Partners

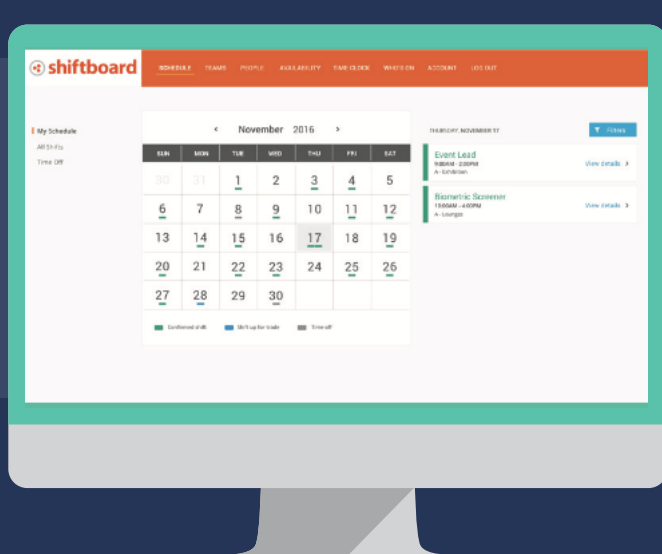
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STEP BACK TO LEARN

What can you do better next time?

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



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

[LEARN MORE](#)



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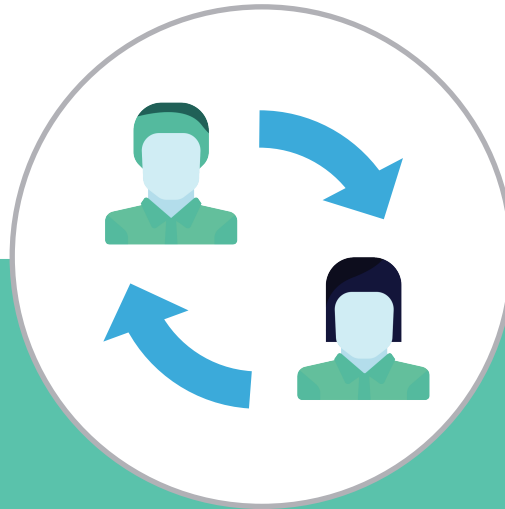
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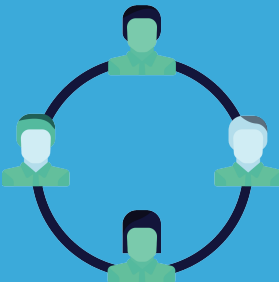


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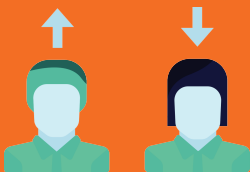


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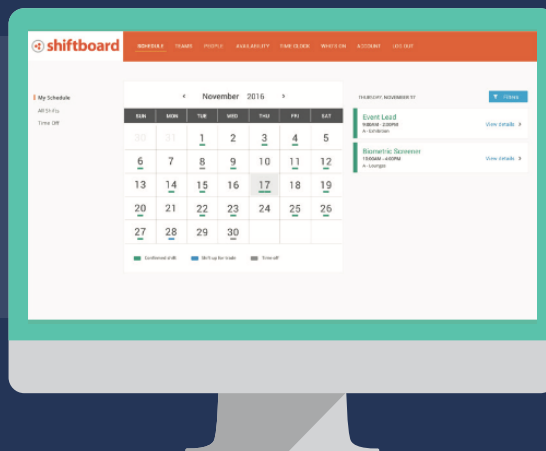
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