# Click. Schedule. Relax.

## WhitePaper

# SCHEDULESOURCE

## Getting Lean and Mean in Hard Times:

How Executives and Managers Can
Use Workforce Optimization Tools to
Cut Expenses and Boost Revenues

CLICK. SCHEDULE. RELAX.

CLICK. SCHEDULE. RELAX.

## SYNOPSIS

If you're like most executives and managers, you're simply looking for ways to survive in this down economy, let alone boost profits. Executives and managers like you are rethinking their approaches to business, reevaluating their enterprises from top to bottom and front office to back.

**This paper focuses on how you can optimize your workforce scheduling to do business better, quicker, and more cost-effectively.**

It looks at how improvements in workforce utilization create positive ripple effects throughout your enterprise. Specifically, we look at how effective employee scheduling can help you:

- cut costs
- gain greater visibility into your workforce needs and plan accordingly
- apply more of your management expertise to top line sales, and
- improve both employee and customer satisfaction

Employee satisfaction alone can have a telling impact on profitability. For example, Taco Bell discovered that their stores with the lowest turnover delivered double the sales and 55 percent higher profits than stores with the highest turnover rates.[1]

**If you're ready to be more successful in achieving a healthier cash flow, read on.**

## INTRODUCTION

Corporate earnings in the new millennium have been lackluster to say the least. The continued worldwide economic malaise has forced top-down reevaluations by executives and managers to identify methods to cut expenses and boost earnings. That leaves executives creating innovative programs to reduce their raw material supplier costs, raise their product/service prices or cut labor expenses. All three are wrought with challenges and difficulties.

In this paper, **we will discuss a viable method for reducing your labor expenses.** We don't suggest you embark upon a painful campaign of salary cuts, like many have done recently. Nor do we explore the temporary cost benefits of layoffs. Instead, we examine a simple, long-term solution to boost your per-employee revenues by doing more with less while also keeping both your employees and customers satisfied, happy, and engaged.

"Today's business model requires businesses to remain competitive. That means eliminating non-value-added activities where possible, and automating those that remain." [2]

CLICK. SCHEDULE. RELAX.

### By-hand tools aren't enough

In a survey of 2,101 scheduling managers, we found that the overwhelming majority, 84.5 percent, uses "by-hand" scheduling tools. [*See Figure 1, Primary Scheduling Tools.*] These are made up of graph paper and Excel spreadsheets. For enterprises that schedule employees clustered across ever-increasing geographic areas, who demand ever-more flexibility, and who wish to be competitive in the information age, such tools are woefully inadequate and obsolete.

### Workforce data visibility - the key to success

In order to make improvements to their current business and forecast future business needs, executives and managers need greater visibility into their workforce data, and such data collection must be automated and online for their use. Managers need to escape the pressing administrative burden of building schedules and use their skill sets to do what they do best–devise plans to boost sales based on their in-the-trenches knowledge and experience.

### Workforce employee schedule optimization - the path to greater revenues

Executives and managers alike need to optimize their employee schedules, slashing over-scheduling to cut labor costs and matching their employees' skill sets with appropriate work assignments. In these ways, enterprises can get a handle on their labor costs and thrive in a highly competitive environment.

CLICK. SCHEDULE. RELAX.

## SECTION 1

### Reducing labor-force costs

How can you optimize your staff schedule? Getting the right mix of elements is critical and deceptively easy. **Overstaffing is very costly**, factoring in salary and benefits. **Understaffing costs** you nothing less than **customers**, disgruntled by long waits and the stressed out personnel serving them.

And how do you create schedules that will both **attract and retain good employees?** This is a particularly vexing issue among healthcare organizations seeking out good nursing talent.

### Optimize workforce schedules

When it comes to creating employee schedules, executives and managers turn to three options:

1. software applications covering the gamut of sophistication and algorithms
2. Excel spreadsheets
3. a stubby pencil with a large eraser and graph paper

Our survey showed that the majority of scheduling managers use the second and third scheduling options almost exclusively. [*See Figure 1, Primary Scheduling Tools*]

More and more companies are finding that such tools don't make the grade. This is particularly true among companies with more complicated work schedules like in the food services and healthcare industries, or in dynamic environments like call/contact centers, casinos and universities.

Such was the case for The Navy Federal Credit Union, (NFCU) the world's largest credit union with 4,000 members. Management found that scheduling managers were overwhelmed using by-hand tools to schedule their 650 agents handling 600,000 calls per month[3]. The chaos that the NFCU experienced was tamed following the implementation of an automated scheduling application that integrated forecasting and scheduling functions to, among other things, more accurately schedule employee breaks, lunches and part-timers.[4]

Figure 1    **Primary Scheduling Tools**



*Source: 2000 ScheduleSource Survey of 2,101 scheduling managers*
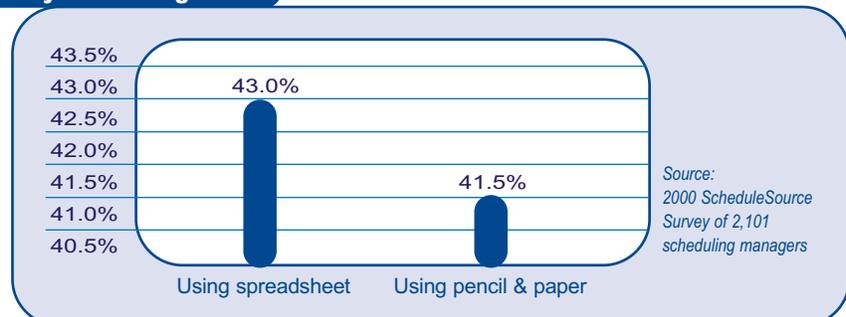
# CLICK. SCHEDULE. RELAX.

For smaller enterprises, like a family-owned four-table diner, the stubby pencil will be a cost-effective way to schedule mom, dad and two sons.

For many enterprises, like franchises, small- and medium-sized businesses, healthcare organizations, call/contact centers, casinos, universities and such, significant advantages can be gained through leveraging scheduling applications to optimize the use of their workforce and by extension, lower their expenses. [*See Figure 2, Workforce Optimization Versus By-Hand Tools.*]

This was true for a Hazelwood, Mo. - based catalog company, Knight's Direct, that abandoned manual scheduling practices because they were not cost-effective.[5]

A good scheduling application can deliver a 2-25+ percent reduction in hours scheduled while simultaneously meeting forecasted customer service expectations. Your ultimate goal is to reduce your actual labor curve to match your forecasted requirements. Looking at Figure 2, you would want to convert the direct expenses associated with over-scheduling (here represented with ● and □ symbols), to savings. Likewise, you would want to eliminate the indirect costs associated with under-scheduling. These costs may be measured in terms of lost customers and lower employee productivity.

**Figure 2    Workforce Optimization Versus By-Hand Tools**



This goal can be challenging using by-hand methods given that scheduling **managers spend large amounts of time solving complex logic problems**, balancing a myriad of constraints, requests for time off, varying availabilities and skill sets. The tools managers use are not up to the task, consuming time and energy among managers that would be better spent boosting sales as well as employee and customer satisfaction.

Click. Schedule. Relax.

The use of these methods is a response reflex by managers that implicitly acknowledges the need for workforce optimization. Unfortunately, **manual methods are void of effective forecasting and reporting tools to help executives tune their workforce to current and future market conditions.**

Enterprises using variable shift schedules suffer proportionately more as the complexity of their scheduling requirements increase.  This was the case at Gateway, for example, who's customer service call centers were plagued with problems arising from manual scheduling tools.  As Katherine Fritz, Gateway system administrator, recalls:

> "On a regular basis we found ourselves overstaffed during slow periods and understaffed during busy periods.  Not only were we wasting money to have employees sit idly by the phones, but we were also frustrating our customers by not putting them immediately in touch with the right technicians." [6]

By-hand methods are also less accurate, notes hotel-industry expert Rae Gibbons who says:

> "Using the paper method of scheduling leaves an operation open for a lot of errors to occur due to the wealth of information that goes into scheduling, especially if it is a big operation.  Scheduling factors include amount of pay, overtime, schedule changes, actual hours worked, vacation and sick time." [7]

As the complexity of workforce scheduling increases, so too must the executive's sophistication in forecasting.  As contact center analyst Steve Morrell points out:

> "Next-generation workforce management solutions will focus heavily on allowing contact center managers to plan their long-term strategies. Businesses will use these tools to model their operations based on various assumptions (agent turnover at 20%, fixed agent career paths, 25% of workload being e-mail etc.).  Rather than having to react to external forces, the contact center manager will know how to resource the operation effectively before the events actually happen and will have a good idea of their effects on the business." [8]

CLICK.  SCHEDULE.  RELAX.

## MATCH SKILL SETS WITH WORK ASSIGNMENTS

Another way executives can optimize their workforce is to match employee work assignments to their primary skill sets. While the idea is not new, scheduling managers juggling large labor pools often find this easier said than done. And in this down economy, customer retention is more critical than ever. This being the case, executives rely on a strategy of "putting their best foot forward", placing employees with the highest customer service expertise on front line stations. This strategy is underscored in the troubled sporting goods industry where the majority of retailers view a salesperson's attitude as the critical component in converting customers to repeat visitors[9].

**When selecting a workforce optimization application, look for one that will enable your managers to rate each employee by workstation or function.** A  restaurant employee, for example, might be rated on hostess and waitress skills.  As shifts are being assigned, the best employees available will be scheduled to deliver the best service possible.

### Multi-skilled Productivity

Employees possessing multiple skills are valuable to enterprises, a value that may translate to earnings and cost savings.  A study by the Center For Construction Industry Studies states:

> "Previous research efforts demonstrated benefits of multiskilling, including potentially a 5-20% labor cost savings, a 35% reduction in required project workforce, a 47% increase in average employment duration, and an increase in earnings for multiskilled workers."[10]

**Thus you'll want to evaluate scheduling software applications that empower your managers to consider multiple skill sets.**

## REDUCE TURNOVER COSTS AND BOOST EMPLOYEE RETENTION

Executives need no introduction to the phenomenon of employee dissatisfaction with scheduling. And in some industries, like healthcare for example, this issue has become critical. Hospitals simply can't afford to lose nursing resources over something as basic as scheduling.  And in point of fact, healthcare organizations recognize this, going to great lengths to offer flexible scheduling to attract, and retain, nursing talent.[11]
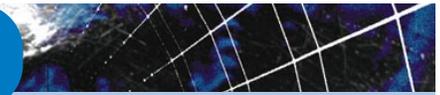
CLICK. SCHEDULE. RELAX.

Typically, scheduling dissatisfaction among employees boils down to:

- a lack of flexibility[12] on the part of their enterprise
- feelings that managers arbitrarily create schedules (including favoring certain employees over others), and
- feelings that employees have no say in scheduling

Pamela Tabor noted this trend in a recent issue of Healthcare Informatics, stating that:

> "With the high turnover rates for nurses and the competitive market for their skills, keeping nurses happy has become a huge factor in many healthcare systems. Not surprisingly, one of the biggest trends is providing tools so staff can take a greater part in their own schedules."[13]

Scheduling software applications can help on all counts. First, since employees are ranked according to their skills, the shifts they are assigned are based on transparent, unbiased criteria. This gives employees a sense of fairness in scheduling.

**Now, with recent advances in software technology, Web-based "portals" can easily be created to offer employees unprecedented input into their scheduling.** Time off requests can be automated, and employees can take responsibility for their own schedules through the use of an online swap board to self-select a shift or shifts at times they prefer to work. In this way, managers and employees become partners in the scheduling process to a level that administratively is all but impossible using "by hand" methods.

Michael Warner, co-founder and chair of AtStaff Inc agrees, noting, "The biggest changes in the market have been the move toward more employee-centric processes and the move toward the Web. They go hand in hand because they serve each other."[14]

## ATTRACT THE BEST EMPLOYEES TO BETTER SERVE CUSTOMERS

Good scheduling solutions help you both attract good employees and retain them. Offering flexible scheduling figures prominently in executives' strategies to hire top talent. Industrial psychologist Steve Armstrong agrees, saying:

> "There's definitely a migration toward a more flexible work environment. One of the challenges, regardless of economic conditions, is finding good workers. You never hear an executive say we have too many qualified people, so accommodations in scheduling are absolutely made for that reason."[15]

CLICK. SCHEDULE. RELAX.

**Workforce scheduling applications provide managers the ability to create flexible constraints upon which schedules are based.** This is particularly important to employers like universities and call centers, who rely upon student-employees with wildly fluctuating schedules. University employers can easily tune their scheduling application to allow for one hour shifts, allowing their student employees to fill required work assignments while simultaneously meeting requirements.

### AUTOMATE LABOR-INTENSIVE ACTIVITES

Staff scheduling can easily become unwieldy when managers juggle more than 15 employees. Barring managers with photographic memories, simply keeping track of employee skills, time-off requests, and past performance is impossibly taxing.  This was the case for Amarillo, Texas-based Hastings Entertainment, Inc., an entertainment superstore with 118 stores throughout the Western United States:

> "Before Hastings automated its employee scheduling process, store managers spent a lot of unproductive time making out schedules. Each store has 60 to 80 employees, divided among 11 departments. Store managers would spend six to 10 hours every week trying to juggle…[various] factors with their best guess of when people would be needed."[16]

**Creating a schedule is an administrative task.**  Managers are hired for their ability to boost revenues, cut expenses and deal with the many personnel problems enterprises face.  By migrating by-hand scheduling tools to a scheduling software application, managers have more time to focus on these mission-critical objectives.

**In fact, the average manager can gain up to four or more productive weeks per year to focus on managerial objectives simply by automating workforce-scheduling tasks.**

In a 2000 survey of 797 scheduling managers, ScheduleSource found that managers spent a weighted average of 28.1 workdays per year on scheduling activities alone.  Given that the average work-year has 230 workdays (20 days per month x 12 months – 10 days vacation) that represents 12 percent of an average manager's time.
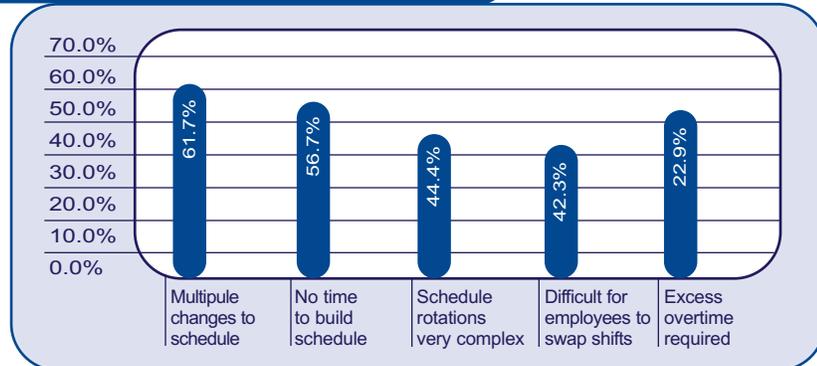
*Most executives tell us they'd rather have their managers spend time implementing revenue initiatives than doing administrative work.*

## Click. Schedule. Relax.

### Delegate schedule-maintenance burden to employees

In a 2001 survey of 2,101 scheduling managers and executives, ScheduleSource found that the number one issue facing them was the nightmare of multiple schedule changes. [*See Figure 3, Major Scheduling Issues Facing Schedulers*.]

Figure 3   **Major Scheduling Issues Facing Managers**

| | | | | |
|---|---|---|---|---|
| 61.7% | 56.7% | 44.4% | 42.3% | 22.9% |
| Multipule changes to schedule | No time to build schedule | Schedule rotations very complex | Difficult for employees to swap shifts | Excess overtime required |

*Source: 2000 ScheduleSource Survey of 2,101 scheduling managers*

One reason scheduling software applications liberate more of a managers' time is because they enable the use of "shift-swap" mechanisms that allow employees to seek out, arrange and submit a shift-change notice to a manager.  So rather than a manager spending their valuable time on scheduling, employees take a greater, proactive role in arriving at acceptable work schedules.

### Information available to all levels of decision-makers

From an executive's viewpoint, the greatest weakness of spreadsheet and paper scheduling tools are that they lack detailed reporting and forecasting capabilities. To increase profitability, executives must be able to analyze their workforce statistics, matching their labor force with projected earnings.

More sophisticated scheduling applications allow executives to drill down deeper, identifying per-store and even per-employee costs.  Armed with this information, executives may investigate their top performing stores and use their methodologies to create a best practices plan for use throughout the enterprise.

Enterprises commonly use complex formulas based on revenue and/or volume to project their staffing needs.  And while the formulas vary from industry to industry, they are a critical tool for determining staffing levels.  This is especially important to retailers, for example, who can earn 50-75 percent or more of their annual revenues during the holiday season.  Scheduling software applications can collect, collate and report historical data for use in "what-if" planning scenarios.

CLICK. SCHEDULE. RELAX.

# Section 1

## Summary

Thus, when you evaluate an effective scheduling optimization application, look for:

**Schedule Optimization** to minimize over- and under-staffing.

Specifically, verify it:
- considers employee skill levels
- makes use of multiple employee skills at multiple workstations
- considers employee work availability
- considers employee non-work time and vacation
- considers your business rules
- optimizes shifts based on multiple time segments
  (5 minutes, 10, 15, 20, 30, 60, etc.)
- optimizes on varying shift lengths
- ensures that the best employees are working at the most critical times
- handles complex shift rotations with ease
- easily accommodates seasonal labor fluctuations

**Automation of labor-intensive administrative tasks by delegating:**
- administrative burden of schedule creation to the application
- schedule-change burden to employees
- schedule-related workforce communications to the application

**Enhanced communications** between management and employees.

Specifically, it should have:
- web portal capable for employee shift swapping, time off and vacation requests
- company-wide, group, and individual messaging/email communications
- company-wide, group, and individual calendaring

**Robust reporting capabilities** at all levels to arm executives with information to make better decisions

**Strong forecasting tools** to help executives optimize their workforce enterprise-wide

**Integration with existing legacy systems** to fully leverage current capital investments

CLICK. SCHEDULE. RELAX.

## SECTION 2

### THE SCHEDULESOURCE SOLUTION

ScheduleSource specializes in workforce optimization, scheduling, and employee collaboration tools and first launched its ASP-based scheduling software application in 1999.

**Since that time, executives and managers have displaced hundreds of thousands of manager-hours spent creating over 4 million shifts to more productive areas. More impressive, however, is the fact that they also saved more than $10 million by reducing the unnecessary over-scheduled labor-hours across hundreds of companies of all sizes nation-wide.**

*Table 1:* **Projected savings among users through scheduling optimization**

| Total Shifts: | 4,000,000 | 4,000,000 | 4,000,000 |
|---|---|---|---|
| AvgHrs / Shift: | 4 | 4 | 4 |
| Total Hrs: | 16,000,000 | 16,000,000 | 16,000,000 |
| Est.Reduction: | 1% | 5% | 10% |
| Reduced Hrs: | 160,000 | 800,000 | 160,000 |
| Avg $ / Hr: | $10 | $15 | $20 |
| **Savings:** | **$1,600,000** | **$12,000,000** | **$32,000,000** |

### SCHEDULESOURCE BENEFITS TO YOUR ENTERPRISE

The ScheduleSource Suite helps executives and managers achieve their labor force and business objectives.

*Table 2:* **Benefits to Executive and Managers**

| ScheduleSource Application Enables | Executives | Scheduling Managers | Employees |
|---|---|---|---|
| True staff schedule optimization | | | |
| • Enterprise level | ● | | |
| • Store level | | ● | ● |
| • Match skill sets with work stations | | ● | ● |
| • Simple and complex rotation overlays | | ● | ● |
| • Single and multiple shift templates | | ● | |
| • Vacation and time-off planning | | ● | ● |
| Gain enterprise-level visibility into workforce statistics | | | |
| • Executives can analyze, draw conclusions and apply strategies to increase their operational efficiencies | ● | | |
| • Forecast labor needs | ● | | |
| • Analyze per employee revenue statistics across stores/locations | ● | | |
| Reduce costly employee turnover through increased schedule satisfaction | | ● | ● |
| Significantly reduce manager-hours spent scheduling - up to 28 days per year on average | ● | ● | |
| Collaborate closely with employees | | | |
| • improve communications and overall productivity | | ● | ● |
| • reduce employee turnover rate | ● | ● | |

Click. Schedule. Relax.

The ScheduleSource solution is designed to help executives optimize the use of their workforce and uses sophisticated forecasting and scheduling modules so that enterprises can maintain their edge well into the future.

## ScheduleSource application suite

The ScheduleSource Application Suite consists of five parts to help executives achieve their goals of cutting labor expenses, maximizing the use of their managers' skills, boosting sales, retaining good employees and delivering the best customer service possible.

### ScheduleSource Application Suite
1. Forecast Pack
2. Scheduling Pack
3. Reporting Pack
4. Employee Access Pack
5. Development Pack

### Forecast Pack

The Forecast Pack gives unprecedented power to the scheduling manager as well as your enterprise. Forecasted headcounts by workstation, broken out by time slots (5 to 60 minute slots) are used as constraints for the optimization of shift templates. They can also act as a reality check for executives, letting them run "what-if" scenarios with ease.

Say a franchise expects sales to increase in a region by 20 percent as a result of a promotion.

The Forecast Pack allows you to create schedules to simulate this need. From there, forecasted shifts are rolled up to a headcount total, which allows executives to identify any staff shortfalls and plan and initiate hiring programs long before they're needed. In short, the Forecast Pack helps executives keep their optimized edge while preventing labor shortages that lower customer service to unacceptable levels and cost the company revenues.

As an example, the Forecast Pack allows you to take historical raw headcounts for a time interval and optimally project future labor requirements and generate shift templates. As a result, the actual scheduled labor curve will optimally match the forecasted labor curve. This is particularly important to call center and retail managers whose labor requirements fluctuate wildly throughout the day, week, month, and even across seasons.

## CLICK. SCHEDULE. RELAX.

Reports based on forecasted labor requirements empower executives to align their HR recruiting efforts with projected staffing needs. They can tailor realistic job descriptions based on projected shift schedules and give HR the heads-up on when new staff will be needed, with which skills, to serve at which stations, thereby allowing sufficient lead time for HR to initiate hiring.

### Scheduling Pack

The Scheduling Pack is a full-featured scheduling application that helps managers and executives minimize employee over/under time, match employee skill sets with work-stations, and automate the creation of schedules. It minimizes non-essential labor hours through the software's sophisticated algorithms while enabling managers to meet their customer service expectations.

### How it works

After logging onto the application Web portal, managers input business constraints to guide the creation of their shift schedules. Users may customize their criteria including maximum/minimum shift lengths, downtime between shifts, minimum skill level required, and assigning employees skill levels for specific stations, to name just a few.

Once this base data is entered, optimized shift templates are automatically created for each day of the standard week to come up with a weekly, then optionally a monthly schedule. Shift templates, combined with rotation patterns, provide a highly flexible environment allowing managers to easily create infinite "odd" schedules, like police and fire department rotations, for example. Additional templates may be overlaid on the base templates to adjust for holidays or special promotions.

Once the master week template is complete, the scheduling manager assigns employees to shifts with one mouse click. In just a fraction of a second, an optimized employee schedule is created— incorporating all the constraints relevant to your business and workforce. And of course you can manually adjust templates and schedules at any time. From there, a schedule is published via user-defined media, whether on the Web, to paper or via email notification to employees.

### Analyze performance and make improvements

Since ScheduleSource collects data and enables **analysis, executives can tune operations to fully maximize potential**. For example, it is easy to identify which stores or employees deliver the highest profit per employee, investigate what they do differently, and create and implement a "best practices" tactical plan.

Taco Bell, for example, determined that "…the 20 percent of Taco Bell franchises with the lowest turnover have double the sales and 55 percent higher profits than the 20 percent of stores with the highest employee turnover.[17] " Armed with this information,

## CLICK. SCHEDULE. RELAX.

executives there can create, tailor and implement programs to reduce employee turnover, all the while justifying the costs by tying them to ROI.

### Franchises take note: Centrally manage a geographically-dispersed workforce.

One of the greatest strengths of the ScheduleSource application is that it enables executives and managers to oversee geographically dispersed labor resources. This could be as simple as managing employees located on different floors at a call center or more complex scenarios like managing a labor pool allocated in franchise locations citywide, statewide, nationwide, or even worldwide.

This may all be done via a standard browser for ease of use and to facilitate seamless collaboration between the headquarters, individual franchisees, and franchise employees.

**Franchise headquarters can make scheduling templates available for use by their franchisee's scheduling managers who then use them in conjunction with their store-specific constraints to build schedules.**

### Executives can reduce risk of labor related legal actions

One of an executive's responsibilities is to ensure that the enterprise is compliant with federal, state and local laws. The ScheduleSource application easily allows scheduling managers to meet regulations associated with scheduling.

Walk into any McDonalds, for example, and you're likely to find 16 and 65-year-olds working side-by-side behind the counter. These employee demographics have specific laws governing their work hours. Teens are limited in the number of hours they can work each week, and in some places, how late they may work. Retirees have social security constraints on the number of hours they may work before they begin to lose benefits.

The ScheduleSource application helps you create compliant schedules based on constraints tailored to meet your specific labor law requirements. By consistently honoring these labor constraints, automatically and with every schedule, executives significantly reduce the risk of legal problems associated with labor violations.

### Automates scheduling to liberate more work hours for mission-critical functions

Executives hire managers to control and cut expenses, boost sales, manage employees and overcome daily business issues. Yet many managers spend inordinate amounts of time grappling with administrative functions that are easily automated.

Managers, by virtue of operating on the front lines, can better craft solutions to help their companies. So every minute they spend on administrative tasks is one not spent on boosting the bottom line for the company. By using the Scheduling Pack to complete scheduling duties, managers can dramatically reduce the amount of time they spend creating and maintaining schedules—time better spent focusing on meeting revenue objectives.

CLICK.  SCHEDULE.  RELAX.

### Reporting Pack

The best executive decisions are based on good information. **The Reporting Pack collects, collates and reports data to fully support executive decision-making**. It has robust reporting features, empowering executives with the unlimited ability to slice, dice, view, and analyze schedule data.  You can view the data on the Web, from disparate locations, downloading data for analysis in Excel, and easily filter, sort, and group it as you see fit.

Franchises also benefit tremendously from this functionality.  Quantitative labor data helps franchisee's gain visibility into their workforce staffing and per-employee performance metrics.  And by extension, they can more accurately forecast future needs based on historical data.

### Employee Access Pack

The Employee Access Pack is designed to enhance employee productivity and consists of the Employee Shift Swap Board and the Collaboration Pack.

### Employee Shift Swap Board

If making multiple changes to your schedules is a big pain for you, then you're in good company.  Of 2,201 scheduling managers surveyed, 62 percent cited this as their top scheduling issue.  [*See Figure 3, Major Scheduling Issues Facing Managers*]

Let's face it, the moment you publish a schedule, employees start requesting changes.  And this can become extremely time-consuming, taking managers – and employees – away from mission-critical tasks.

The ScheduleSource Swap Board addresses this issue head on, **delegating the majority of the schedule change burden to employees**.  The Swap Board resides on your enterprise's ScheduleSource portal and is accessible to employees via a login screen complete with encryption, as well as username and password protection.  The employees can only access and see information relevant to what they've been authorized to access.

Once logged on, an employee may visit the online swap board to claim a shift or to place one of their shifts on the board.  Employees who qualify for a swap board shift, (they are both available to work and their skills match the workstation, for example), may automatically claim the shift from the swap board.  Since swaps must also conform to scheduling constraints, a manager does not need to spend time revisiting a logic problem to determine if a shift change would work – ScheduleSource does it for the manager.

"If you rate a feature by the amount of use it receives, then our Swap Board portal gets top billing.  Our statistics show that it is used by over 90 percent of our customers' employees.  I think that speaks to what employees want today and what makes them happy at a company.  Having more control over their schedules is a big plus among workers."

*Bill Hammers,*
*co-founder,*
*ScheduleSource, Inc.*

**Collaboration Pack**

Collaboration is a key differentiator in today's successful enterprises that are fully leveraging the talents and abilities of a synergistic group working toward common goals. To facilitate this objective, ScheduleSource created the Collaboration Pack that allows managers and employees to work in unison like never before.

This tool is a central "dashboard" for managers, allowing them to communicate to individuals, teams or all employees as needed. All communications are date-time stamped—a feature that eliminates such conflicts as who asked for time off first.

The Collaboration Pack includes group and individual calendaring features that allow employees to access their specific schedules and view company-wide events, for instance. Managers can maximize their efficiency, not only composing a single communication to request employees' presence at an allhands meeting, but simultaneously place it on all employees' calendars to block out the time. The Collaboration Pack also gives email notification of swaps and schedules. Schedulers and employees choose if and when they want their schedule emailed to them and how many days to include in the schedule. In addition, they choose whether they want email notification of their shift swapping activity.

As a result, managers can integrate employee communications, corporate calendars and personal calendars to streamline efficient workplace communications.

**Development Pack - Interfacing with your legacy systems**

ScheduleSource offers seamless integration with your legacy systems from "hiring to firing". Using the ScheduleSource API (application programming interface), your HR systems can be configured to automatically populate ScheduleSource data.

And conversely, ScheduleSource can automatically push schedule data to your legacy time and attendance and/or payroll applications. In fact, ScheduleSource can easily communicate with any of your legacy systems, becoming a welcome addition to your enterprise software application portfolio, working in concert with your other systems and increasing their value through synergistic collaboration.

**CLICK. SCHEDULE. RELAX.**

### BUY IT OR ASP IT?

One of the first choices an executive will be faced with is whether they should install the ScheduleSource application at their location or subscribe to the service via the ASP model.

One of the major advantages to subscribing to ScheduleSource is that you **can be using the application within minutes.**

This is in contrast to other solutions that take 6 to 12 months or more to fully install and implement.  With ScheduleSource, there are no configuration issues to sort through nor worries about your enterprises IT infrastructure.  Just sign up, sign in, configure your constraints, build your schedule templates, create a schedule and publish it.  It's as simple as that.  And down the road, as your business grows, it is a simple transition to bring it in-house, if desired, to accommodate your business growth.

A second major advantage to leasing is that **you don't need IT resources.**  ScheduleSource's IT group fully supports the application and adds new features on an unprecedented monthly schedule.

A third major advantage to leasing ScheduleSource services is that the **application is hosted in a Tier I data center** (Inflow, *www.inflow.com*).  Top-quality data centers are imperative if you want to guarantee an extremely high level of security against physical threats, like flooding, power outages, terrorist attacks, as well as security threats like hackers.

For medium-sized enterprises scheduling clusters of 500 or more employees, it may make more sense economically to install the application in-house.  Typical medium-sized companies have the IT infrastructure to support and extend the application and want hands-on control over integration with their legacy systems.

CLICK. SCHEDULE. RELAX.

# SECTION 2

## SUMMARY

The current economy is forcing executives to take extraordinary measures to cut costs, increase operational efficiencies and find ways to increase sales. Labor costs represent a top expense for most enterprises and an opportunity to make changes that positively impact the bottom line.

Optimizing your workforce is an example of one such change where you can empower managers and employees. Software applications using sophisticated algorithms perform consistently and significantly better, reducing scheduling costs associated with by-hand alternatives—in literally a fraction of the time.

ScheduleSource delivers **workforce optimization** that finely tunes your staff scheduling and therefore positively reduces the associated expenses. Moreover, ScheduleSource provides **communications and collaboration** tools that support an enterprises' cost-control objectives and better leverages your managers to do what they do best - devising and implementing improvements to front-line operations.

For executives seeking visibility into their workforce operations there is no better solution than ScheduleSource. And armed with those statistics, you're better able to forecast accurate staffing needs.

**ScheduleSource gives you the tools you need to optimize your workforce, meet your cost and revenue objectives, and fine-tune your operational efficiencies enterprise-wide.**

## LEARN MORE

**Contact us now to learn how ScheduleSource can help you begin realizing immediate returns on your investment.**

**Call us at 1.800.340.0763 or visit us at www.schedulesource.com.**

**Our friendly, knowledgeable staff will be happy to answer your questions in minute detail. Indeed, our passion is helping executives and managers alike achieve success through workforce optimization.**

CLICK. SCHEDULE. RELAX.

## ENDNOTES

1   *WORKFORCE WEEK*, September 1-7, 2002, www.workforce.com

2   LaBell, Philip, E. and Chatterjee, Amitava, "Trends in POS: Pricewaterhouse Coopers sees lower deployment costs and inroads for wireless devices," *Foodservice Information Systems Report*, Volume 12, Number 19, October 15, 2001, p. 1.

3   McCall, Jay, "Abandon Ship." *Integrated Solutions*, November 2001, http://www.integratedsolutionsmag.com/Articles/2001_11/011102.htm#sidebar.

4   McCall, Jay, "Abandon Ship." I*ntegrated Solutions*, November 2001, http://www.integratedsolutionsmag.com/Articles/2001_11/011102.htm#sidebar.

5   Stroud, Jerri, "Work Force Manager Pipkins, Inc Finds Incubator At Hazelwood Firm," St. Louis Post-Dispatch (MO), July 5, 2002, p. B8.

6   McCall, Jay, "Please Hold, Your Call Is Important," *Integrated Solutions*, February 2002, http://www.integratedsolutionsmag.com/articles/2002_02/020204.htm.

7   Gibbons, Rae, H., "Labor Scheduling Systems Offer Hoteliers Power Of Prediction," *CynterPubs H&A Report*, January 3, 2001.

8   Morrell, Steve; Philonenko, Laurent, "20:20 CRM: A Clear View on the Future of the Contact Center," May 2001, www.genesyslab.com/2020_crm, Chapter 5: Staffing tomorrow's contact center: Multimedia Workforce Management, p. 77.

9   Kurt Salomon Associates, "The Bottom Line: Improving Efficiency in an Uncertain Economy," [6] *Perspective*, March 2002, Athletic Leisure, p. 7.

10  Tucker, Richard; Haas, Carl, T.; Glover, Jr., Robert W. and Borcherding, John, D., "Planning and Scheduling of a Multiskilled Workforce," Center For Construction Industry Studies (CCIS), p. 1.

11  Brown, Patti, "Nursing crunch creates headaches in Iowa," *The Des Moines Register* (IA), May 26, 2002, p. 1K.

12  See Golden, Lonnie, "The Time Bandit, What U.S. workers surrender to get greater flexibility in work schedules," *EPI Issue Brief*, Economic Policy Institute September 21, 2000 Issue Brief #146, pp. 1-4.

13  Tabar, Pamela editor, "AUTOMATED SCHEDULING: Staff scheduling shifts into high gear," *Healthcare Informatics*, August 2002, p. 13.

14  Tabar, Pamela editor, "AUTOMATED SCHEDULING: Staff scheduling shifts into high gear," *Healthcare Informatics*, August 2002, p. 13.

15  Kleiman, Carol, "Even temp firms bend rules, offer flexible hours," Chicago Tribune (IL), August 20, 2002, p. 1B.

16  Bresnahan, Jennifer, "Optimal Scheduling," CIO Enterprise Magazine, January 15, 1998, http://www.cio.com/archive/enterprise.

17  "People Performance Management," WORKFORCE WEEK, September 1-7, 2002, www.workforce.com.