7 QUESTIONS TO SELECT THE RIGHT ENTERPRISE-LEVEL SCHEDULING AUTOMATION SOLUTION

With new scheduling tools popping up daily, there’s no wonder why so many businesses are confused with where to start. With almost two decades of experience, we’ve helped thousands of customers understand what they need to be successful with their scheduling solution. We suggest asking the following seven questions before choosing a scheduling automation provider.

1. What does scheduling automation mean to you?
Many simple scheduling tools are designed from spreadsheets and built for simple workflows. While this may fit small workforces, many mid-to-large organizations are left looking for a solution that forms to their complex needs. Scheduling automation is about working with large workforces and sophisticated schedules to understand current workflows then automate key processes to optimize labor costs, worker engagement, and customer satisfaction.

- **Scheduling automation enables better decisions**
  Leading scheduling automation solutions are built to automate key scheduling functions and guide managers to make the best decisions possible. For example, current solutions automate tracking employee information so managers are routinely presented with a list of available and qualified workers. Scheduling automation should guide managers to create accurate schedules and control overtime.

- **Complex scheduling requires a sophisticated solution**
  The right scheduling solution empowers your managers and reduces your risk of violating compliance policies by tailoring the platform to automatically account for worker availability, business rules, and other scheduling variables.

- **Automation that’s built for scale**
  Your scheduling tools should not limit your growth. Adopting a scheduling automation solution that scales with your business is paramount to the future of your organization.
2. How does scheduling impact your revenue?

Traditionally, scheduling has been accepted as tactical and chaotic. In a time when paper schedules reigned supreme, managers did the best they could with the limited tools at their disposal. With technology ever improving, today’s businesses are able to turn scheduling from a tactical burden to a strategic advantage. Optimizing labor costs, improving quality of service, and guarding against worker turnover all stem from a strategic approach to scheduling.

- **Scheduling automation can optimize your labor costs**
  Scheduling strategically is more than filling shifts, it’s optimizing how you schedule to meet the strategic goals of your business. Contemporary scheduling solutions align to your staffing needs to optimize your workers’ schedules while also cutting the time it takes your managers to create accurate schedules.

- **Scheduling automation can improve your quality of service**
  Your workers are on the frontlines of your business day-in and day-out. If they’re frustrated, overworked, or burnt out, your quality of service will suffer. Scheduling strategically means building checks and balances into your scheduling platform to make sure your workers get the hours they want without facing fatigue.

- **Scheduling automation can slash turnover rates**
  Old school scheduling tools left employees with little options to engage with their schedules. Modern solutions empower the workforce with 24/7 accessibility to view and edit their schedules on their smartphones. Whether it’s trading shifts, requesting time off, or simply viewing their upcoming assignments, modern scheduling solutions improve your workforce engagement and satisfaction.

3. How can scheduling improve your manager productivity?

Most organizations openly admit their scheduling processes do not maximize their manager effectiveness. Disconnected spreadsheets, lost email attachments, and unspoken tribal knowledge all add to scheduling inefficiency. The best scheduling solutions allow managers to consolidate all of their documents, worker information, and tribal knowledge into one centralized solution.

- **Scheduling 101: Workforce visibility**
  For managers to do their job successfully, they need access to accurate, up-to-date workforce information. Leading scheduling platforms do more than just schedule, they consolidate large workforce information into one centralized system. Managers are more productive when they can easily see who is or isn't clocked-in, available, and in need of training.
Scheduling automation improves scheduling accuracy

While many companies want it, most have yet to figure out how to accurately predict the future. Creating accurate schedules for an unknown future is a constant hurdle for managers with hourly workforces. Luckily, great scheduling automation solutions feature labor forecasting and bulk change tools that allow businesses to use historic data to quickly construct future schedules.

The only constant in life (and scheduling) is change

As many managers can attest, creating the schedule is only half of the battle. As conditions change, managers need a flexible solution. Leading scheduling solutions allow managers to quickly target and communicate to the right workers at a moment’s notice. Mobile-friendly schedule management and tiered schedule access can further improve how companies manage change.

4. What scheduling information do you need to make data-driven decisions?

While data is important, great scheduling solutions transform data into business insights, allowing managers to make better decisions backed by real evidence. Scheduling strategically means capturing your current processes, identifying areas for improvement, and measuring your progress.

Reports that transform business

Scheduling success used to mean that there were enough workers to meet demand. However, rising labor costs coupled with global competitive pressures are pushing businesses to become more granular in how they measure their efforts. Measuring overtime spend, tracking time-clock actuals, and running coverage reports draws direct correlations from scheduling practices to the bottom line.

Measure overall labor effectiveness

Overall labor effectiveness (OLE) is commonly used in manufacturing to measure labor availability, performance and quality. By centralizing workforce information, scheduling automation brings this business insight to organizations across all industries to quantify the effectiveness of their labor.
5. How scheduling automation leads to productive and engaged workers?

It’s getting harder and harder to believe that there was ever a time before smartphones. Finding answers used to mean clocking hours in the library or asking that one smart friend for advice. Today, all of the world’s knowledge is quite literally in the palm of our hands. While most employees have smartphones, employers have been slow to adopt their processes to today’s technology. Many organizations still operate with paper schedules, disconnected spreadsheets, and outdated communication strategies. Want happier employees? Give them a solution that fits their lifestyle.

Empower your workers to get engaged

Balancing work with everything else is a challenge that unites all of us. For hourly employees, their work schedule determines everything from paychecks to free time. The best scheduling solutions provide workers with mobile-friendly tools to view, communicate, and adjust their assignments. The happiest workers are those empowered to balance their work lives with their everything else lives.

Tailored solutions improve workforce adoption

While it may seem obvious, the best scheduling solution for your organization is one that is tailored to your workforce. Aligning automated scheduling to the needs of your employees improves both adoption and productivity. The best scheduling solutions combine self-service features with communication tools to keep your managers and workers engaged with the same up-to-date schedule.

Reduce worker fatigue, burnout and turnover

Nothing burns-out your workforce faster than overscheduling your employees. Managers know better than anyone that worker fatigue leads to low morale, reduced quality of service, and unhappy customers. When done right, automated scheduling lowers fatigue, burnout, and turnover by enabling your managers and employees to work together to create accurate and agreeable schedules.
6. Beyond scheduling, what other tools do you use to manage your workforce?
Scheduling automation is most effective when it’s integrated into the rest of your workforce management technology ecosystem. By connecting your existing tools with scheduling, your managers are able to measure business insights across multiple platforms and identify any potential issues before they occur.

- **Scheduling automation with time and attendance**
  Scheduling automation is not limited to merely assigning shifts. With built-in time and attendance capabilities, leading scheduling solutions deliver real-time visibility into who’s scheduled, who’s clocked-in, and who’s not. At a moment’s notice managers recognize an unplanned absence, communicate with the missing worker and find an available replacement if needed.

- **Scheduling integrates with existing workforce management systems**
  Strategic scheduling is about using all available information to your advantage. By integrating your existing HRIS, HCM, CRM, WFM, time management or payroll platform into scheduling, your managers can quantify the key business metrics you need to monitor your strategic business plans.

7. Do you need product support or customer success?
For many organizations, setting up an automated scheduling solution is not only a new concept, it’s a major change in the way they do business. Solutions providers need to deliver more than product support, they need to help customers understand how to best set up and automate their current business processes.

- **What is automated is amplified**
  Without the right coaching, organizations may automate inefficient processes, magnifying their wastefulness. Before any business implements a scheduling automation platform, they need to spend time with a scheduling expert to optimize their existing processes.

- **Customer success means depth of knowledge**
  To be successful, organizations with large workforces need help implementing rapidly and measuring value. The best scheduling solutions bring a team of customer success and account managers to onboard rapidly, measure ROI, and help organizations become more efficient over time.