


 Viewpoint

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Modern Workforce Scheduling: New Capabilities, New Mindset

Over the last decade, various aspects of scheduling deskless or hourly workers, and managing their efforts in general, have become increasingly more sophisticated. While this has largely been a result of organizations wanting and needing more precision around deploying workers, scheduling processes are being pulled to even greater levels of sophistication for other reasons of late. The new catalysts are arguably more related to employee-centric considerations such as what employees want and need

from these processes, and how their lives at work are impacted by them.

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In industries such as manufacturing, retail, hospitality, dining, healthcare and transportation, organizations are reaping the benefits of workforce management (WFM) platforms, and specifically, their newer scheduling automation capabilities. Just one example is the way in which third-party tools and flow-of-work collaboration and communication features have been embedded directly into workforce scheduling activities. This has resulted in workers being able to inquire what a certain shift is like or what skills are needed for it, again, with more emphasis being placed on the needs and interests of workers. Beyond the range of key HCM processes to execute well on within the WFM realm, this is really about the quality of the employee experience (EX) more broadly. Indeed, a management focus on the EX has become highly correlated with the ability to attract and retain top talent, not unlike the benefits of delivering a superior customer experience.

In our view, three pivotal WFM-related topics or operating lenses have emerged from this intense focus on the EX: The convergence of employee and non-employee WFM processes, advanced technology considerations, and what we'll refer to as "scheduling for all." Let's double-click a bit on these three critical themes.

Convergence of Employee and Non-Employee Processes: Today's WFM software buyers will increasingly face the need to include non-employees such as gig workers in the scope of their scheduling processes and associated cost analyses. Our view is that by 2023, as many as one-half of



organizations using WFM will look to bring gig workers into that process. This will be necessary both when regular employees are not available and when, for example, shorter-term projects don't lend themselves to standard hiring. As interesting a new dynamic as this might be, we're still some time away from this being a top-of-mind consideration of management in predominantly deskless worker businesses.

Advanced Technology Considerations: In continuing to explore the intersection of the EX with workforce scheduling processes, a subject that does have universal relevance to industries with large segments of deskless workers, we'll state the obvious fact: consistent, predictable schedules promote work life balance as well as the perception of fairness and equity, both of which are critical elements in achieving a corporate culture that attracts and retains talent. Certain technology considerations become front and center within this context. They include the ability of an organization to be very transparent to the workforce around its scheduling drivers, and particularly, what paths the worker can pursue to maximize opportunities for job satisfaction and career growth. Examples such as the system-enabled capability to easily swap shifts with colleagues, or know what skills or certifications are needed to have access to potentially more attractive shifts are particularly critical as organizations endeavor to stave off the current, unprecedented wave of voluntary employee exits. Moreover, technology that allows maximum precision in scheduling optimization efforts, including down to 15-minute intervals, is one of the major capabilities on management's wish list.

Scheduling for All: This is all part of a pervasive shift in mindset as it relates to workforce scheduling within medium and larger organizations, and it's a shift that is even extending to the scheduling of salaried, professional workers. The operational triggers and requirements in this case are less about regulatory compliance or even projecting fairness and consistency to workers. Organizations that have the ability to know at a detail level all key aspects of labor supply, demand and usage have a decisive competitive advantage when it comes to defining or modifying strategic plans and priorities. That said, another contributing factor might be recent legislative changes in different regions (such as the EU) that are now mandating scheduling requirements for the entire workforce. Fortunately, leading WFM technology now allows scheduling optimization at scale.

The points explored here all lead to our fundamental recommendation that when businesses can excel at workforce scheduling they are likely to also earn high marks in the proactive management of many of the other pressing issues facing business leaders today.

Furthermore, scheduling can legitimately be viewed as one of the few HCM workforce activities that cuts horizontally across the most important HCM themes of the day, including delivering a great EX, employee health and well-being, fairness and equity, re-skilling and up-skilling, and organizational agility. It's also an opportunity for HR, finance and operations teams to collaborate around interconnected business objectives and move the organization forward in a coordinated way.



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Steve Goldberg is responsible for the human capital management (HCM) research at Ventana Research. Steve guides HR and business leaders to manage their workforce to gain competitive advantage and value from their investments. He covers the major areas including candidate engagement, employee experience, HRMS, learning management, payroll optimization, talent management, total rewards management and workforce management.