IMPROVING SHIFT SCHEDULING BUSINESS PROCESSES

AUTOMATE FOR SUCCESS
IMPROVING SHIFT SCHEDULING BUSINESS PROCESSES

IT TAKES CREATIVITY

To Design and Implement Efficient Employee Shift Scheduling Systems

Creativity = Thinking Outside The Box!

We’ve always done it that way
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It Takes The Right Strategies
The Strategies Include The:

1. Right Business Processes
2. Right Functionality
3. Right Fiscal Strategies
4. Right Absenteeism and Planned Leave “Budget-Buster” Controls
5. Right Shift Scheduling Strategies
6. Right Technology That Enables The Business Processes

Managing the change process helps assure the successful cutover from one system to another!
The Right Automated Business Processes

Staff Supply (1.0)
- FTE’s
- Overtime budget
- Holiday pay budget
- Other related budget items

Budget-Based Roster Management (4.0)
- Budget-based master rosters
- Budget-based daily rosters
- Budget-based staff training schedules
- Budget-based roster exceptions
- Budget-based off-duty limits control
- Budget-based leave management
- Budget-based overtime control
- Absenteeism accounting
- Skills/qualifications management

Staff Demand (2.0)
- Mission
- Staffing philosophy
- Historical and projected relief factors
- Relevant rules, regulations, policies, procedures, and labor agreements
- Post profiles (post days, post shifts, & post classification and type)

Staff Supply/Demand Analysis 3.0
- Supply/demand balance condition
- “What if” modeling
- Business process re-design
- Fiscal plan development
- Fiscal plan management (review, adjustment during the year)

Interface With Other Systems
- HR
- Payroll data capture

Technology acts as the work process enabler
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The Right Software Functionality

- Human Resources
- Shift Scheduling
- Training
- Skills & Qualifications
- Employee Shift Scheduling and Workforce Management
- Data Transfer To Payroll Systems
- Employee Self Service
- Labor Supply & Demand Analyses
- Time and Attendance
- Absenteeism Accounting

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THR RIGHT FISCAL STRATEGIES

ACHIEVE LABOR SUPPLY / DEMAND BALANCE

BALANCED TO THE BUDGET

USING AN

EMPLOYEE DEPLOYABLE DAYS STAFFING FACTOR
Depending on the balance condition one or more of the options listed below are available:

- **Achieve balance by increasing supply**
- **Do nothing!**
- **Achieve balance by decreasing demand**

### BALANCING STRATEGIES EXAMPLE

#### LABOR SUPPLY

<table>
<thead>
<tr>
<th>BUDGETED FUNDS</th>
<th>BUDGETED FTE’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,440,000</td>
<td>36</td>
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</table>

#### LABOR DEMAND

<table>
<thead>
<tr>
<th>DEMANDED FUNDS</th>
<th>DEMANDED FTE’s</th>
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</thead>
<tbody>
<tr>
<td>$960,000</td>
<td>24</td>
</tr>
<tr>
<td>$384,000</td>
<td>9.6</td>
</tr>
<tr>
<td>$1,324,000</td>
<td>33.6</td>
</tr>
</tbody>
</table>
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THE RIGHT ABSENTEEISM AND PLANNED LEAVE STRATEGIES TO CONTROL “BUDGET BUSTERS”

**Budget** - 210 Average Annual Work Days → **End of fiscal year** – 210 Average Annual Work Days

**THE “BUDGET-BASED” STRATEGY**

1. Develop post-based budgets using post profiles that accurately define the average annual work days that an average salary purchases (210 in the example above).

2. Implement budget-based scheduling. The objective is to develop and implement management strategies that are applied daily to assure that the end of year average annual work days is the same as the average budgeted (210 in the example above).

**“Budget Buster” Example:** Too many staff is as bad as too few staff (pay me now or pay me later

**Key Fiscal Strategies to Combat “Budget Busters”**

- Managing absenteeism and planned leave to keep the peaks and valleys as close to a flat line as possible
- Utilizing Post Flexibility
- Budget-based scheduling
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The Right Employee Shift Scheduling Strategies

Budget-Based Schedules

The Goal
Staff Demand and Staff Supply Balance

\[ \text{Posts} \times \text{Relief Factor} = \text{Budget} \]

Balanced Deployment Strategy

- Policy
- Business Rules

24/7 Shift Scheduling Setup to Deliver Balanced Master and Daily Schedules
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Budget-Based Scheduling Includes

1. Budget-based master rosters
2. Budget-based daily rosters
3. Budget-based staff training schedules
4. Budget-based roster exceptions
5. Budget-based off-duty limits control
6. Budget-based leave management
7. Budget-based overtime control
8. Budget-based absenteeism accounting
9. Budget-based transportation schedules
10. Skills/qualifications management
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The Right Technology That Enables The Business Processes
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THE RIGHT CHANGE MANAGEMENT PROCESSES

Resistance to change

Inability to compromise

It's my way or the highway!

Let someone else do it

My solution is better than yours
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