Collaborative Scheduling

Revolutionary yet Undervalued
The Current Level of Awareness

Better planning undeniably leads to better results. So it is surprising that organizations sometimes overlook employee scheduling software as a key component to the HR management process. For decades, the focus has been on time & attendance, payroll, and other HR applications, so that employee scheduling awareness is now disconcertingly low. According to a Study on Workforce Management, conducted by the Aberdeen Group, nearly half of surveyed organizations (42%) still operate scheduling under a manual or spreadsheet-based process (Fig. 1). Even though these spreadsheet-based processes can be very sophisticated, this process is error prone and still involves a high level of manual work to integrate inputs and generate schedules. The report went on to highlight that 58% of organizations used automation to drive their scheduling processes.

Source of Scheduling Functionality

![Source of Scheduling Functionality](image)

Figure 1: Source Aberdeen Group, July 2013

Workforce Scheduling Benefits

Regardless of its delayed acceptance into the HR consciousness, more and more organizations are automating employee scheduling processes as part of a comprehensive HR strategy to realize multiple monetary and qualitative rewards. At its most basic level, employee scheduling minimizes operational costs through more efficient workforce deployments, as well as improves customer satisfaction and retention through an improved allocation of labor resources. If that's not enough, collaborative scheduling applications take businesses one step further in both increasing management productivity through greater delegation of HR responsibilities and positively affecting employee satisfaction through augmented employee involvement. In light of these significant benefits, the importance of understanding the value of concepts such as collaborative scheduling quickly becomes apparent.
Collaborative Scheduling

Collaborative scheduling encompasses three main functions,

- Collection of Scheduling Preferences
- Incorporation of Scheduling Preferences
- Schedule Distribution and Confirmation

Collection of Scheduling Preferences

Firstly, collaborative scheduling entails shifting the responsibility of collecting employee scheduling preferences, such as availability and time-off requests, into the hands of employees. Employees can electronically submit information through web-based or phone-based self-service software applications so the burden of data collection no longer sits on management shoulders. In the education sector for example, one Midwestern University uses web-based self-service software to schedule its roughly 750 student staff. When a new semester kicks off, students access the application over the Internet to enter their availability, and can indicate changes at any time as conflicts arise. As a result, supervisors have availability details as soon as students enter it — instead of waiting more than a day for manual entries as they previously had been doing. Plus, they receive fewer calls from students regarding changes. In turn, departments lessen the workload during the busiest times and throughout the semester.

Incorporation of Scheduling Preferences

Collaboration scheduling also automates the incorporation of these employee shift preferences in the schedule creation process. Employee submissions automatically feed into the business rules of an associated employee scheduling software so that, in addition to an alleviation of manual data entry, schedulers are given automatic notifications when shifts are assigned outside an employee’s specified range of available times. Because the web-based collaboration software empowers students to enter their availability themselves, supervisors are able to begin scheduling without any manual entry. In the past, students submitted their class schedules and availability on paper forms and student workers would enter that information into Excel spreadsheets from there. Staff members then had to somehow keep this availability in mind while creating the employee schedule and ensuring that each student received adequate hours. In total, the entire process could take up to one full week — just when supervisors were at their busiest. Plus, because of multiple rounds of re-keying information, the entire employee scheduling process was error-prone and risky. If one person’s schedule was off, it had the ability to derail all the other schedules as well; the scheduler often had to start over again from scratch. According to the assistant director of HR-Student Development,

“Smith estimates that eliminating mailed weekly schedules saves the business about $10,000 in postage and colored paper alone every year.”

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Schedule Distribution and Confirmation

In addition to automating the means in which employee information comes in, collaborative scheduling also automates the flow going out by formalizing both the employee schedule distribution and confirmation process. Using collaboration tools that can be accessed over the Internet or telephone, employees are able to access, view, and confirm up-to-date schedules. In the health care sector, In-Home Health Care Services (IHHCS), a Michigan based in-home care provider, uses a telephone-based collaborative tool to publish and distribute employee schedules. Previously IHHCS distributed schedules to employees via mail, leaving little time between when they received employee schedules and when employee schedules began. And when clients’ appointments changed, IHHCS had to resend affected schedules, which was incredibly inefficient. Employee schedule confusion created frequent staff calls to the office, as well as calls from clients when staff were late or did not show up. According to the lead administrator at IHHCS, Jaime Smith, “In this business, every single issue is an emergency issue. We’re talking about getting people taken care of and it’s a very fast-paced environment. Anytime there was a mistake, the phone was ringing off the hook. Our phones were going a hundred miles a minute.” However, instead of mailing employee schedules out, employees can now call in each Thursday to the collaborative phone system to hear their schedules for the coming week. There’s never any confusion or worry whether an employee received a schedule on time. Plus, employees call an automated line, rather than always calling staff with questions - significantly reducing daily calls. Smith estimates that eliminating mailed weekly schedules saves the business about $10,000 in postage and colored paper alone every year.

Employee Self-Scheduling

Despite its many benefits, collaborative scheduling is only the beginning when it comes to management efficiency and employee satisfaction. Employee self-scheduling is the latest paradigm in workforce scheduling and it basically means giving employees the ability to create most of the schedule themselves. Employee self-scheduling gives employees the freedom to choose from a list of available shifts by programming the scheduling software to maintain and incorporate all the required business parameters, such as overtime restrictions and minimum rest periods. At the end of the day, management is therefore only responsible for filling in the few shifts that remain unclaimed. 5 Star Event Services, the largest provider of staffing and security services for events in the Houston area, uses an employee self-scheduling solution to manage its
employees. Previously, all of their employees had to call the office to provide availability and request shifts – at times requiring them to wait 15 – 20 min before talking to someone. However now, with the employee self-scheduling workflow, employees can view all available shifts in a calendar or list view, and drill down further for complete event details. They then simply check the boxes of the events they would like to work and the system automatically schedules them in. The robust functionality of their software ensures that employees never see shifts that conflict with those for which they have already been scheduled. Employees also cannot cancel a shift online, preventing last-minute changes without at least a call to the office. This frees office staff from the tedious work once required to get employees slotted into shifts and effortlessly elevates employee satisfaction in the process.

According to Bobby Jones, Licensed Security Manager of 5 Star Event Services, “It’s alleviated a lot of phone traffic with employees calling about shifts, which helps us retain our good employees. We can [also] grow our company without having to bring on additional schedulers – add more jobs without adding more staff.”

A Paradigm Shift in Employee Scheduling

Collaborative and employee self-scheduling are gaining ground in all industries right now. With today’s HR doctrines preaching workforce empowerment and with the efficiency benefits of these processes becoming more important in a lagging economy, both collaborative and employee self-scheduling are becoming increasingly important tools.

### The Employee Self-Scheduling Process

1. **Software Setup**
   - The first step is to input any business rules that are specific and unique to the organization such as union rules, daily or weekly overtime restrictions, minimum rest periods, or employment law minimum standards.

2. **Employees Schedule Themselves**
   - The software will now maintain and incorporate these parameters when presenting available shifts to specific employees in a list or calendar view. Employees are therefore able to select the shifts they prefer, and are available for, without breaking a business rule.

3. **Manage Remaining Shifts**
   - Once all employees have selected their preferred shifts, management staff is left to fill in the very few schedule gaps that remain. This drastically reduces management time spent scheduling and increases employee satisfaction in the process.