

# Workforce Management: Implementation

People & Technology

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# Agenda

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Process overview

Considerations and timeline

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"When the rate of change inside an institution becomes slower than the rate of change outside, the end is in sight.

The only question is when."

- Jack Welch

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- **10 years:** Workforce Management & Analytics
- **5 years:** people manager
- **Most recently:** delivered a multi-tier scorecard to an executive audience at Workday
- **Industries:** CPG, Retail Banking and Software
- **Major project:** Software implementation across 900 branches and 20,000 FTE at Scotiabank
- **Coding languages:** SQL, SAS, and Python
- **Hobbies:** Camping, canoeing & learning

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## Existing things I cannot answer:

- Technology and architecture
- An exact data curation process
- Propensity for change in the organization
- Budgets, investments and long-term objectives
- Capacity models, skills and attrition
- IVR strategy
- WFH vs office in contact center
- Internal employee policy on mobile use
- Existing workforce management practices
- The unique experience in retail center

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1. Solutioning manual schedules
2. Leveraging technology
3. Current state of scheduling\*
4. Future state of retail scheduling\*
5. Future state value proposition for retail\*
6. Future state of concierge & dist. center scheduling\*

# Technology opportunities: solution manual schedules

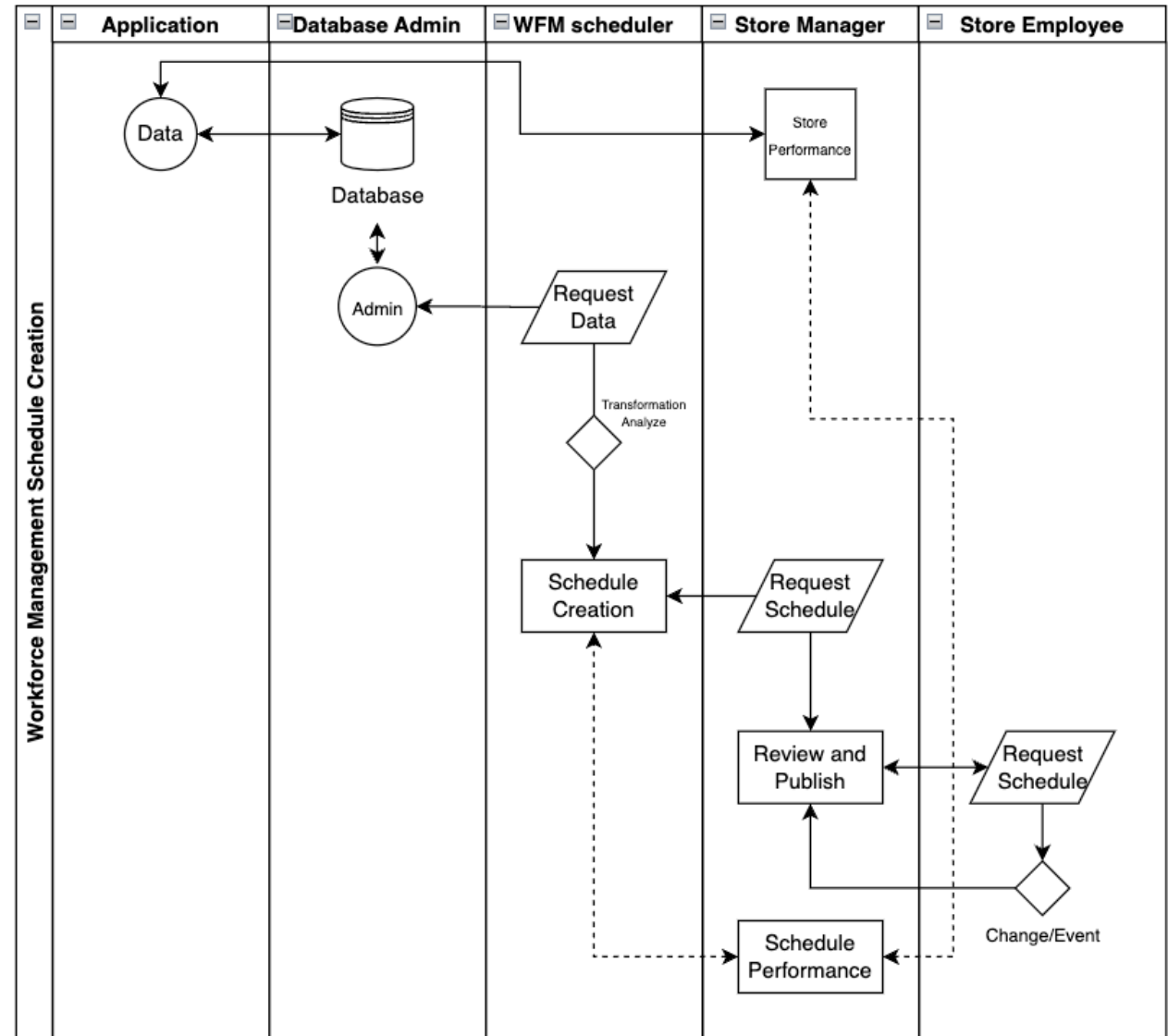
- Automation of the scheduling process
- Reduction of errors and inconsistencies in schedules
- Improved data visibility and access for both schedulers and employees
- Real-time updates and notifications of schedule changes
- Improved accuracy and efficiency in scheduling and re-scheduling
- Better tracking and management of time-off requests and approvals
- Streamlined communication and collaboration between schedulers and employees
- Generation of reports and analysis of scheduling patterns and trends
- Increased flexibility and customization of schedules based on employee preferences and constraints
- Integration with other HR systems and tools for a seamless experience.

# Technology opportunities: leverage technology

- Cloud computing technology
- Artificial intelligence and machine learning
- Mobile and web application development
- Workflow management and automation
- Employee self-service portals
- Notification and messaging systems
- Data management and storage solutions
- Business intelligence and analytics tools
- Integration with payroll and time tracking systems
- Human resources information systems (HRIS)
- Authentication and access control systems
- Project management and collaboration platforms.

# Technology opportunities: current state of scheduling

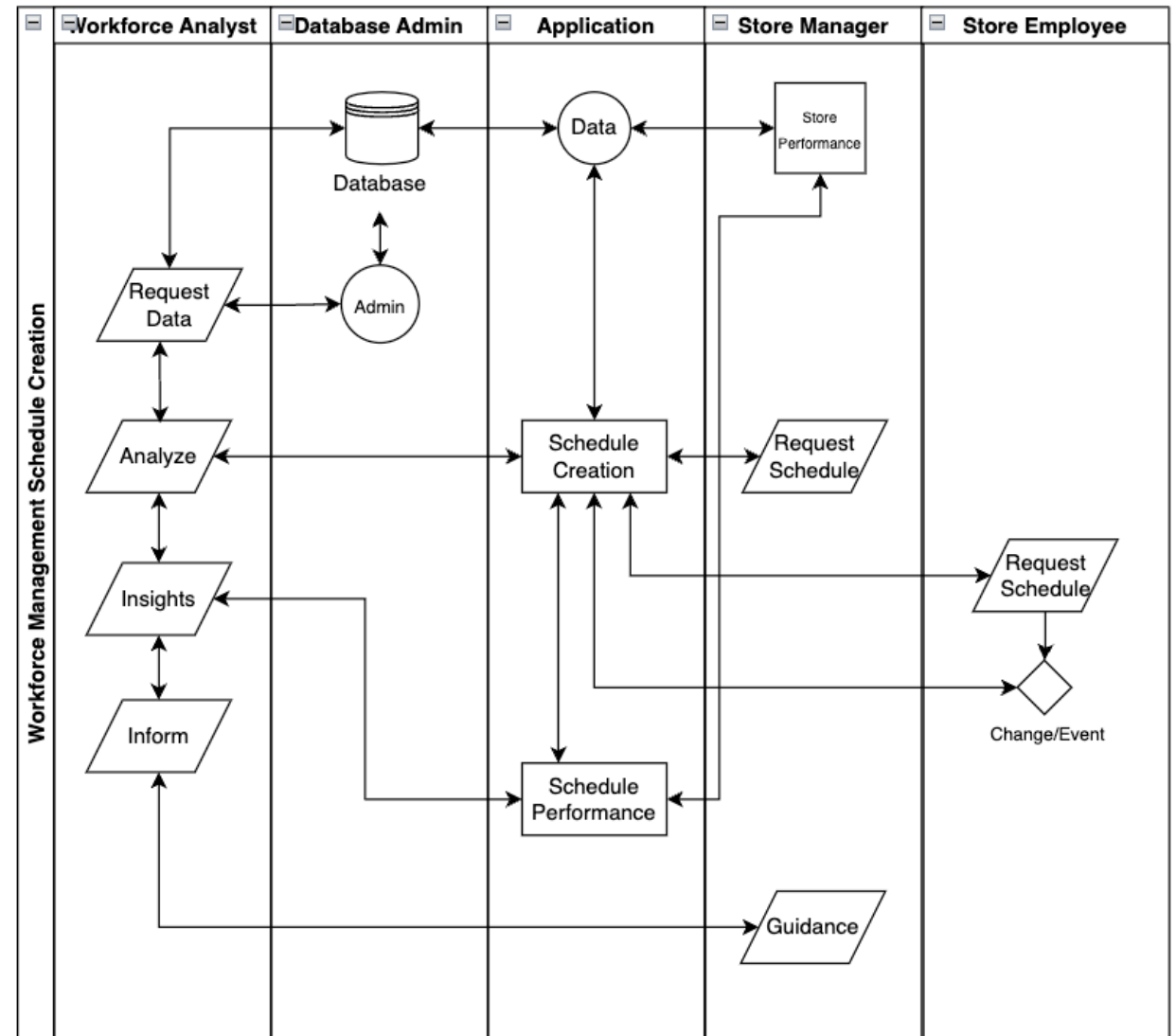
- Requesting-, obtaining- and transforming- data comes with many opportunities for risk.
- The bulk of manual work done by a WFM analyst requires preparation and communication when creating and publishing schedules.
- There is a loss of data visibility once a schedule has been published to the given workplace
- Scheduling is centralized in the Workforce management department and limits the tracking of Manager input
- Excel processing has limited scalability and is a time-consuming process





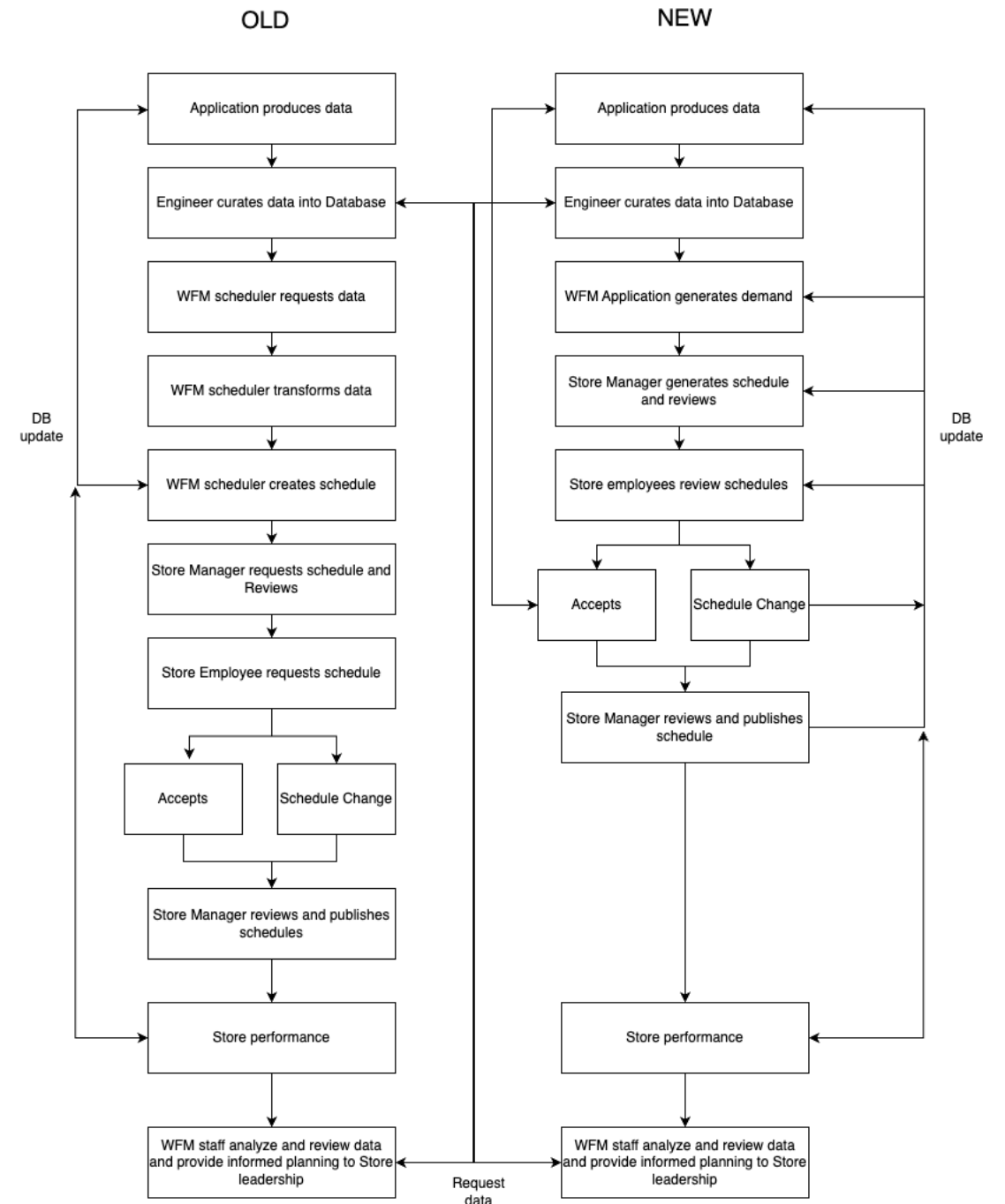
# Technology opportunities: future state of retail scheduling

- Retail leadership and staff have access to real-time data such as sales, customer traffic and inventory levels.
- Workforce management can provide a bigger picture view on insights and provide guidance to retail leadership.
- Data is retained when a schedule is adjusted or changed, thus tracking absenteeism and shift-swaps. Schedule performance provides success metrics.
- Retail leadership maintains ownership of everything involved in the store end-to-end, keeping the knowledge of the business intact
- A hybrid approach for retail stores would give retail leaders the opportunity to have a tailored approach when responding quickly to demand and workforce management control over resource allocations, policy and data governance.



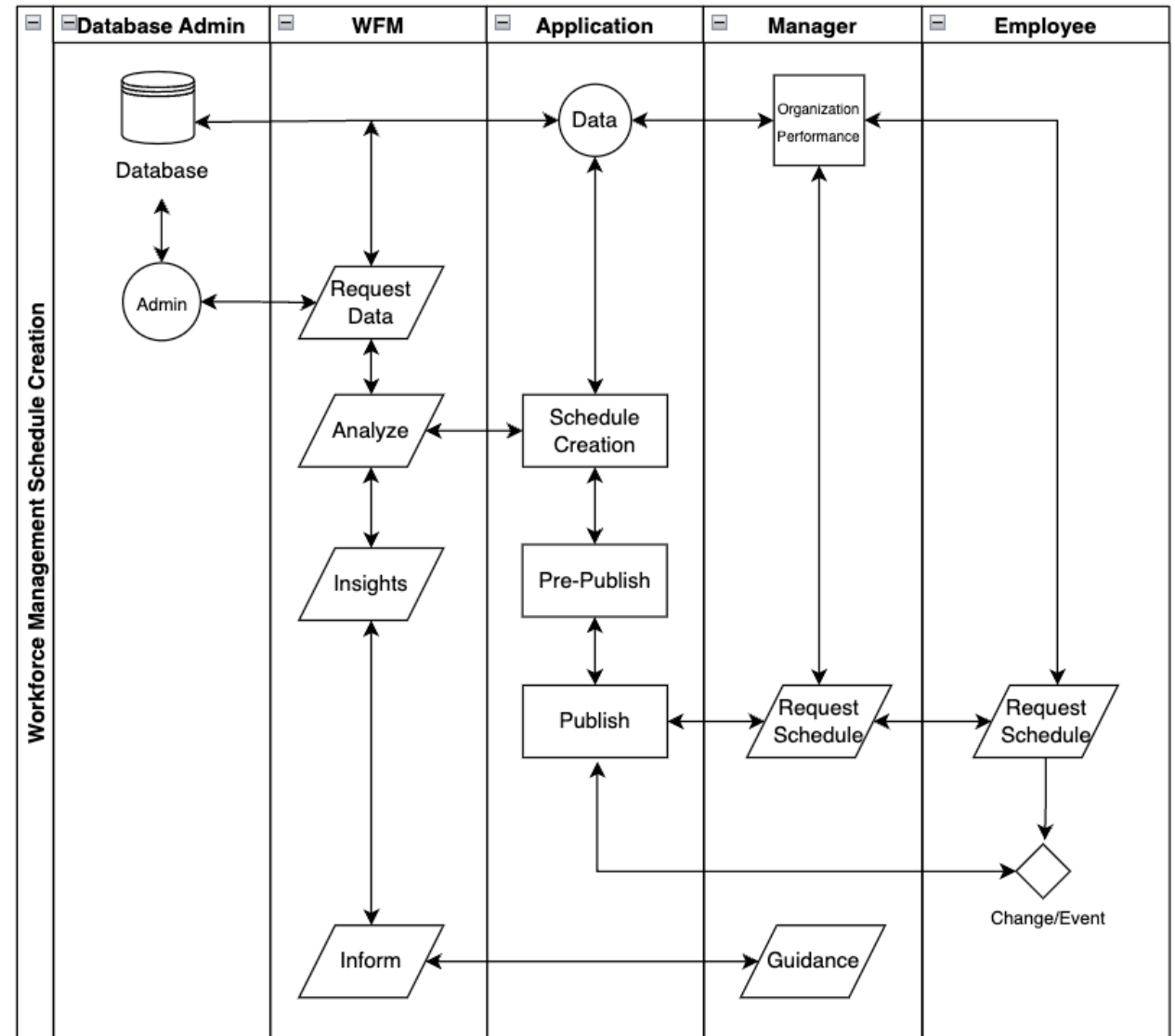
# Technology opportunities: future state value proposition for retail

- **Knowledge of the business:** Retail stores have a better understanding of the day-to-day operations, peak times, and the required number of staff to handle customer demands.
- **Real-time data:** Retail stores have access to real-time data such as sales, customer traffic, and inventory levels, which can help them make informed scheduling decisions. No data loss.
- **Faster decision-making:** Retail stores can quickly respond to changes in demand and make scheduling adjustments as needed, without having to go through a lengthy approval process.
- **Closer connection to employees:** Retail stores have a closer relationship with their employees and are better equipped to understand their scheduling preferences, availability, and skill sets.
- **Productivity Optimization:** Both the retail stores and Workforce Management team gain the ability to focus on the outcomes of the retail store.



# Technology opportunities: future state of Concierge & Dist. Center scheduling

- Centralizing workforce management for Distribution Centers and Retail allows optimized control over policies and procedures, as well as better informed coordination of vehicles and personnel
- Improved compliance with labor laws
- Better employee experience with consistent schedules and work-life balance
- Consistent with industry practises and approach
- Increased visibility of real-time resource utilization, enabling intraday level management of SLA in contact center and incident resolution in distribution centers



# Technology opportunities: modernizing workforce planning

## Value

- Transparency
- Cost-savings long term
- Productivity gains
- Data centric
- Modern practise: seamless
- Real-time decision making
- Existing and evolving technology
- Comprehensive and complete workflow
- Fostering data driven decision making

## Implementation

- Change management
- Expensive short term
- Continuous training & education
- Policy & compliance development
- Multiple types of technologies
- Centralizing specialty resources
- Vendor selection and business cases

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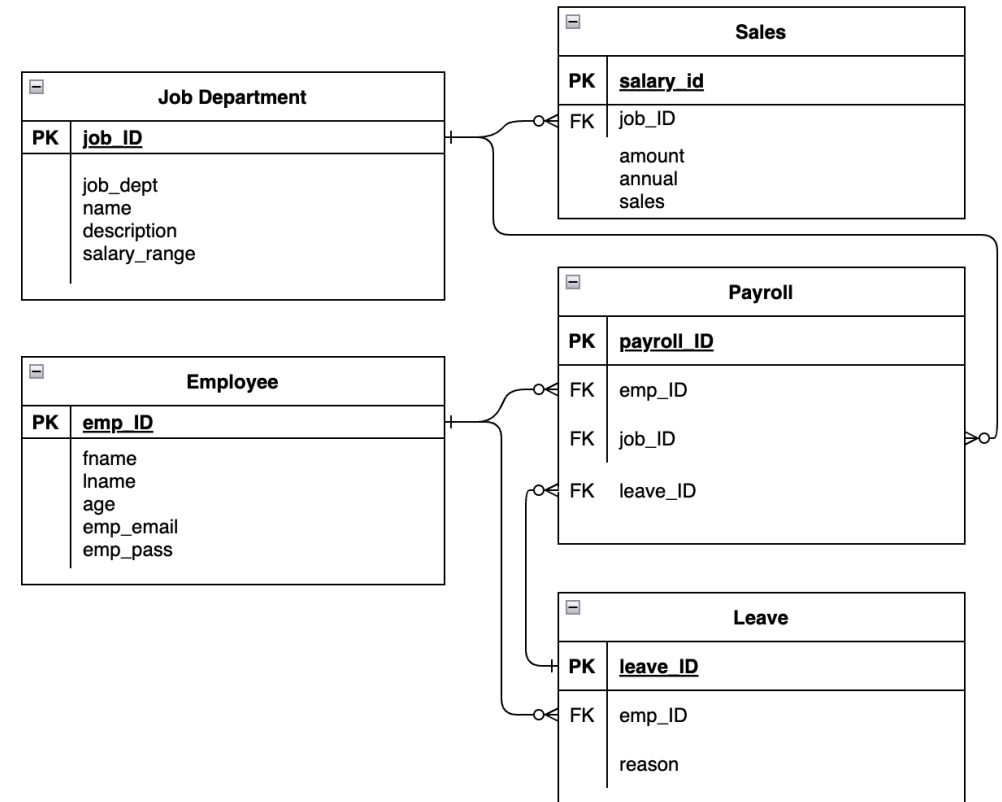
Organizational Effort

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1. Data input requirement
2. Data output requirement
3. Organizational Integration
4. System design
5. Service-oriented architecture

# Process overview: data input requirements

- **Employee information:**  
name, role, tenure, skills, availability, sales etc.
- **Organization:**  
policies and regulations, working hours, shift patterns, overtime, time zone, etc.
- **Templates:**  
scheduling patterns used by a given organization
- **Time off requests:**  
dates, reasons, and approval status.
- **Employee:**  
preferences and constraints regarding scheduling.



**Example:** *entity relationship diagram\**

# Process overview: data output requirements

- Employee schedules:  
dates, shifts, duties, etc.
- Time off approval status:  
approved, denied, pending, etc.
- Schedule changes and updates:  
real-time notifications to employees and schedulers.
- Integration with other HR systems:  
payroll, time tracking, etc.
- Reports and analysis of scheduling patterns and trends:  
total hours worked, attendance, overtime, customers handled, etc.

# Process overview: organizational integration

- **HR Information System (HRIS):**

to import employee information and integrate with payroll and time tracking systems.

- **Authentication and access control systems:**

to ensure secure access to schedules and employee information.

- **Time tracking system:**

to accurately track employee hours worked and integrate with payroll.

- **Payroll system:**

to accurately calculate employee pay based on schedules and hours worked.

- **Communication and messaging systems:**

to send notifications and updates to employees and schedulers.

- **Employee self-service portals:**

to allow employees to access their schedules, request time off, and provide feedback.

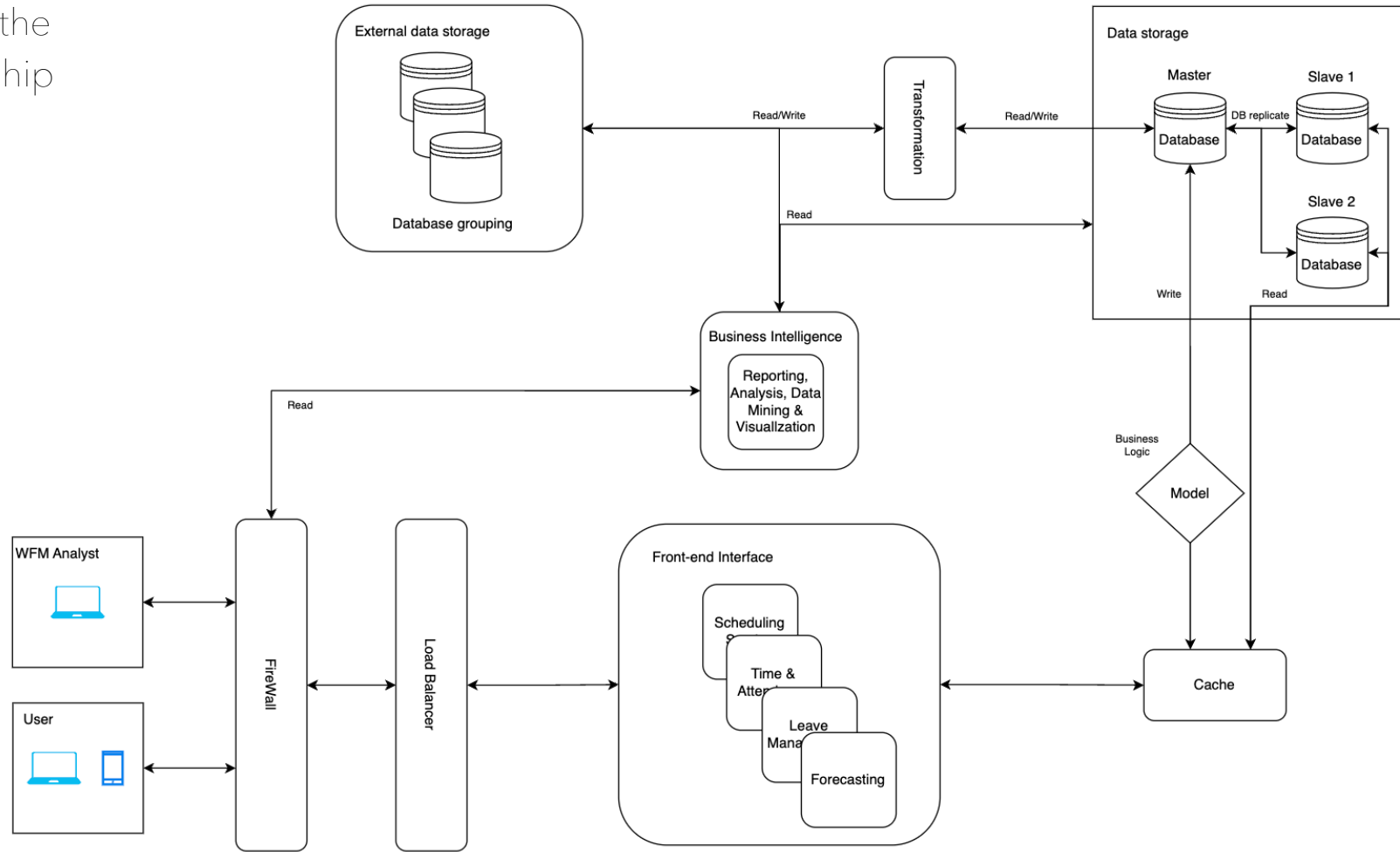
- **Business intelligence and analytics tools:**

to generate reports and insights into scheduling patterns and trends.



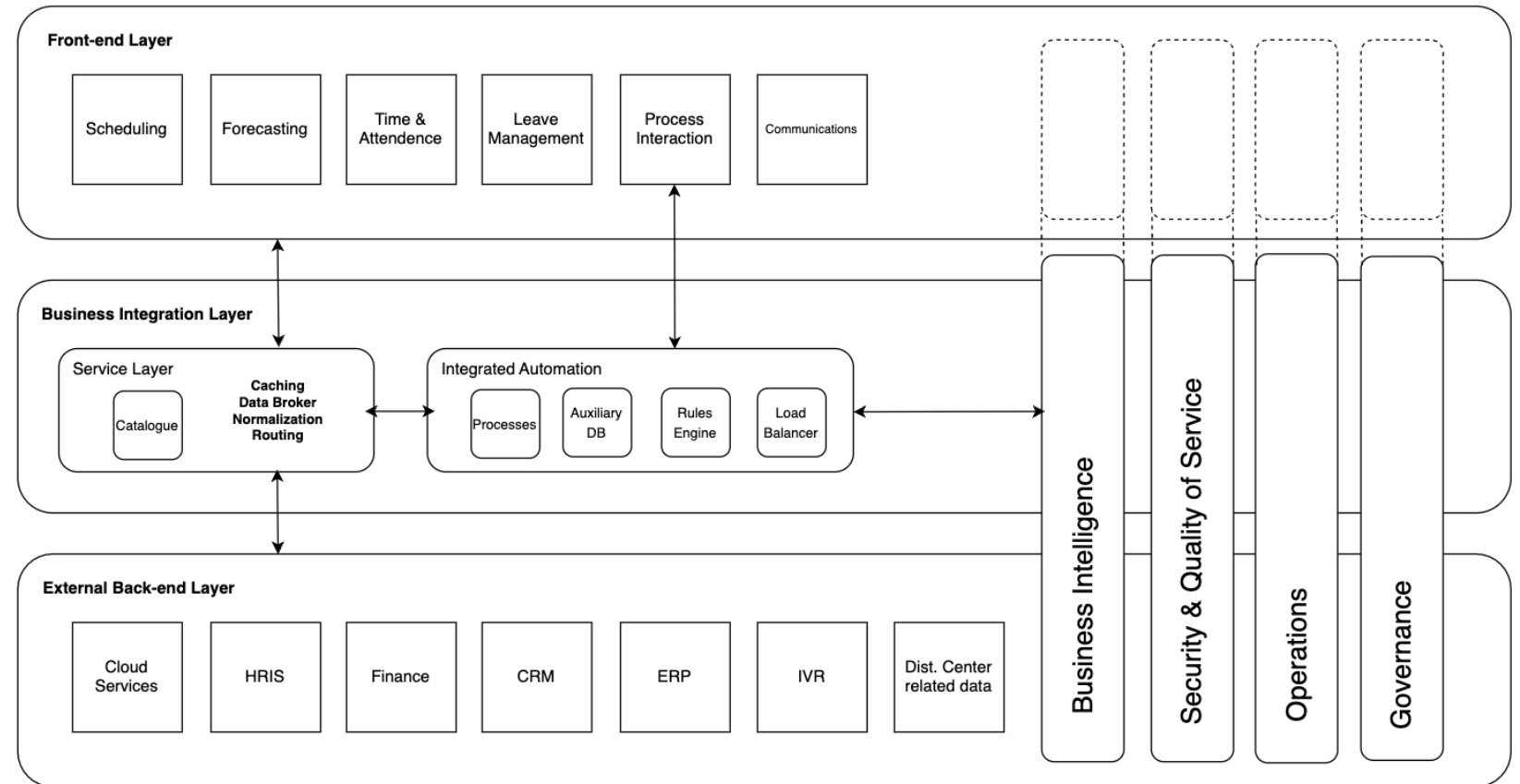
# Process overview: system design diagram

A comprehensive overview of the WFM features and its relationship with Users, Administrators and overarching components



# Process overview: service-oriented architecture

Service-oriented architecture model showcasing communication and interaction between services.



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## **Considerations and timeline**

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1. Considerations (1 – 6)
2. Centralized workforce management
3. Hybrid workforce management

# Considerations and Timeline: first consideration

## **Start with one type of workplace:**

Start with the workplace that has the most pressing needs and where the benefits of the scheduling tool will be most significant. This will allow the team to work out any issues and make improvements before expanding to other workplaces.



# Considerations and Timeline: second consideration

## **Prioritize critical functionality:**

Focus on the most critical functionalities first, such as schedule preparation, schedule creation, and labour compliance. These functionalities are essential for the scheduling tool to be effective and ensure compliance with company policies and regulations.





# Considerations and Timeline: third consideration

## **Gradual roll-out of additional functionalities:**

Roll out additional functionalities, such as schedule publishing, live-week management, absence management, attendance, and time sheets, gradually over time. This will allow employees and schedulers to become familiar with the scheduling tool before adding new features and functionalities.

# Considerations and Timeline: fourth consideration

## **Involve stakeholders in each workplace:**

Ensure that stakeholders in each workplace, such as employees, schedulers, and managers, are involved in the implementation process. This will help to gain their support and buy-in, as well as ensure that the scheduling tool meets their needs and requirements.

# Considerations and Timeline: fifth consideration

## **Plan for training and support:**

Provide adequate training and support to employees and schedulers to ensure that they can effectively use the scheduling tool. This will help to minimize disruptions and ensure a smooth transition.





# Considerations and Timeline: sixth consideration

## **Monitor and evaluate:**

Regularly monitor and evaluate the implementation of the scheduling tool and adjust as needed. This will help to ensure that the scheduling tool continues to meet the needs and requirements of the organization and its employees.

Considerations and Timeline:  
centralizing workforce management  
Customer care & Distribution center



# Considerations and Timeline: hybrid workforce management

Retail center



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# **Organizational effort**

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1. Top of mind
2. People
3. Roles
4. Process

# Organizational effort: Top of mind

**Prioritization:** Determine the priorities of the project based on the needs and requirements of the stakeholders, and allocate resources accordingly. This could involve prioritizing functionalities or workplaces based on the level of impact they will have on the organization.

**Value:** Consider the potential benefits and value of the project, such as improved efficiency, increased compliance, and better employee satisfaction. This will help to ensure that the project is aligned with the organization's goals and objectives.

**Resourcing:** Assess the resources required for the project, including human resources, financial resources, and technology resources. Ensure that the resources are allocated in a way that supports the project priorities and maximizes the value of the project.

**Scope:** Clearly define the scope of the project, including the functionalities, workplaces, and timeline, to ensure that the project stays on track and delivers the expected results. Regularly review and adjust the scope as needed to ensure that the project remains relevant and aligned with the organization's goals and objectives.

# Organizational effort: people

- **Resourcing:**

Ensure that the project has adequate resources, including personnel, technology, and funding, to deliver the expected results.

- **Team composition:**

Assemble a diverse and skilled team with the necessary expertise to deliver the project. Consider factors such as experience, knowledge, and communication skills when selecting team members.



# Organizational effort: roles

The team may need to add or remove roles as the project progresses and will vary based on the available resources.

- **Project Manager:**

Responsible for overall project management and coordination of the team.

- **Business Analysts:**

Responsible for gathering requirements, defining project scope, and preparing the project plan.

- **Technical Lead:**

Responsible for overseeing the technical aspects of the project, including system architecture and design.

- **Quality Assurance:**

Responsible for testing and ensuring the quality of the software.

- **Technical Writer:**

Responsible for creating technical documents and user manuals.

- **Trainer:**

Responsible for conducting training sessions for the end-users.

- **Support Analyst:**

Responsible for providing technical support to the end-users.

# Organizational effort: process

- **Prioritize tasks:**

Establish a prioritization framework that balances project needs, resource constraints, and stakeholder requirements.

- **Risk management:**

Develop and implement a risk management plan to mitigate potential risks that may impact the project.

- **Communication plan:**

Develop a communication plan that outlines how project updates, status reports, and other information will be shared with stakeholders.

- **Resource allocation:**

Allocate resources effectively and efficiently to support the project priorities and maximize the value of the project.

- **Change management:**

Prepare a change management plan to manage changes in project scope, timeline, and other aspects that may impact the project.

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