Title:
Scheduling Retail Employees

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Summary:
Scheduling my team has always been one of my least favorite tasks as a retail manager. It's tedious, it takes hours and even when I think I have it right, I probably don't. What makes scheduling a challenge is that you are balancing the demands of individuals on your team with the demands of your business. This can be a very time consuming and frustrating.

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Article Body:
Scheduling my team has always been one of my least favorite tasks as a retail manager. It's tedious, it takes hours and even when I think I have it right, I probably don't. What makes scheduling a challenge is that you are balancing the demands of individuals on your team with the demands of your business. This can be a very time consuming and frustrating.

Lets say you complete a schedule which took you 2 hours to create. You have carefully made sure everyone has at least two days off, and all approved requests for days and vacations have been honored. You post the schedule and then you are informed that someone on your sales team needs different days off. This may seem simple, however you have to virtually build another schedule, to make the adjustment. You will have to review each individual and day again to insure that all needs are met. Don't you hate when that happens.

How can you make this process simpler and less tedious. My first solution was to train my assistant to do schedules and to delegate this task to him. Problem solved. Well, not quite. I was freed from scheduling, but the problem still existed. Instead of me spending 2 to 3 hours per schedule, my assistant was. However, as a result of him doing it I learned one of the solutions to our problem - "Set Schedules." When he took over the schedule he partnered with each salesperson to ascertain what was their preferred schedule. He then created a

schedule primarily based on business needs and secondarily based on individual preferences.

This worked out great. Some people prefer to work mornings, some evenings, some liked weekends off, while others saw weekends as money days. I was always averse to set schedules since I felt it locked me into giving someone certain days off. However, my team understands that in retail the schedule will vary from time to time. They also understand that evenings and weekends are when most retail business is done. They understand this, because we communicate these ideas regularly - which is the next solution.

If you communicate and inform your team and they communicate and inform you, many of your scheduling woes will vanish. I ask that my team inform me of all requests at least two weeks in advance and that they inform me of vacation requests 4 weeks in advance. I in turn publish 2 weeks of schedules at all times. During meetings I let them know that schedule is variable and I also inform them of days that I will need extra coverage. I emphasize dates in which no vacation request will be honored.

Communicating requests officially vary from company to company. One company I worked for actually had a form for employees to fill out to officially request days off. Strict as this may sound, it worked well. It gave me and the employee a way to keep track of approved requests. Once approved, I enter the request in my planning calendar and then file it in the "Approved Requests File." This is a tidy way of managing requests.

I approve requests on a first come first serve basis. My team knows that asking is not a guarantee, however they also know that I will bend over backwards to give them off the days they want. To keep the approvals fair I restrict hoarding by allowing only two consecutive premium requests. For example, If someone requests Memorial Day off, 4th of July off and Labor Day off, they may get the 1st two, but may not get the 3rd - even if they were 1st to request it. By doing this I limit one person from hoarding all the premium days off. My team understands and agree that it's not fair for one person to get every premium day off. This keeps requests fair and balanced.

People want to have lives outside of work and you should respect and encourage it. Even though I ask for a two week minimum on requests I will approve a request on shorter notice - rules are made to be broken occasionally.

My priority when scheduling is that I want to have my best people work on the busiest days. In other words my focus in scheduling is driving business, through scheduling. In commissioned environments this is great for your top people but

it sucks for your laggards. I have had salespeople get downright indignant over not getting more Saturdays and evenings. In hourly environments it may be a harder sale to your better reps as to why they work a larger share of weekends, for example. You'll have to find the balance.

Scheduling is one of the toughest tasks you have because you have to manage competing personal demands against the needs of your business. How will you manage the wills of your team and prioritize those against the needs of your business. This time consuming task is manageable if you follow a few proven guidelines:

1. Use a Set Schedule whenever possible
2. Set Scheduling rules & guidelines
3. Communicate the guidelines
4. Document requests
5. Make the request process fair
6. Make business the priority