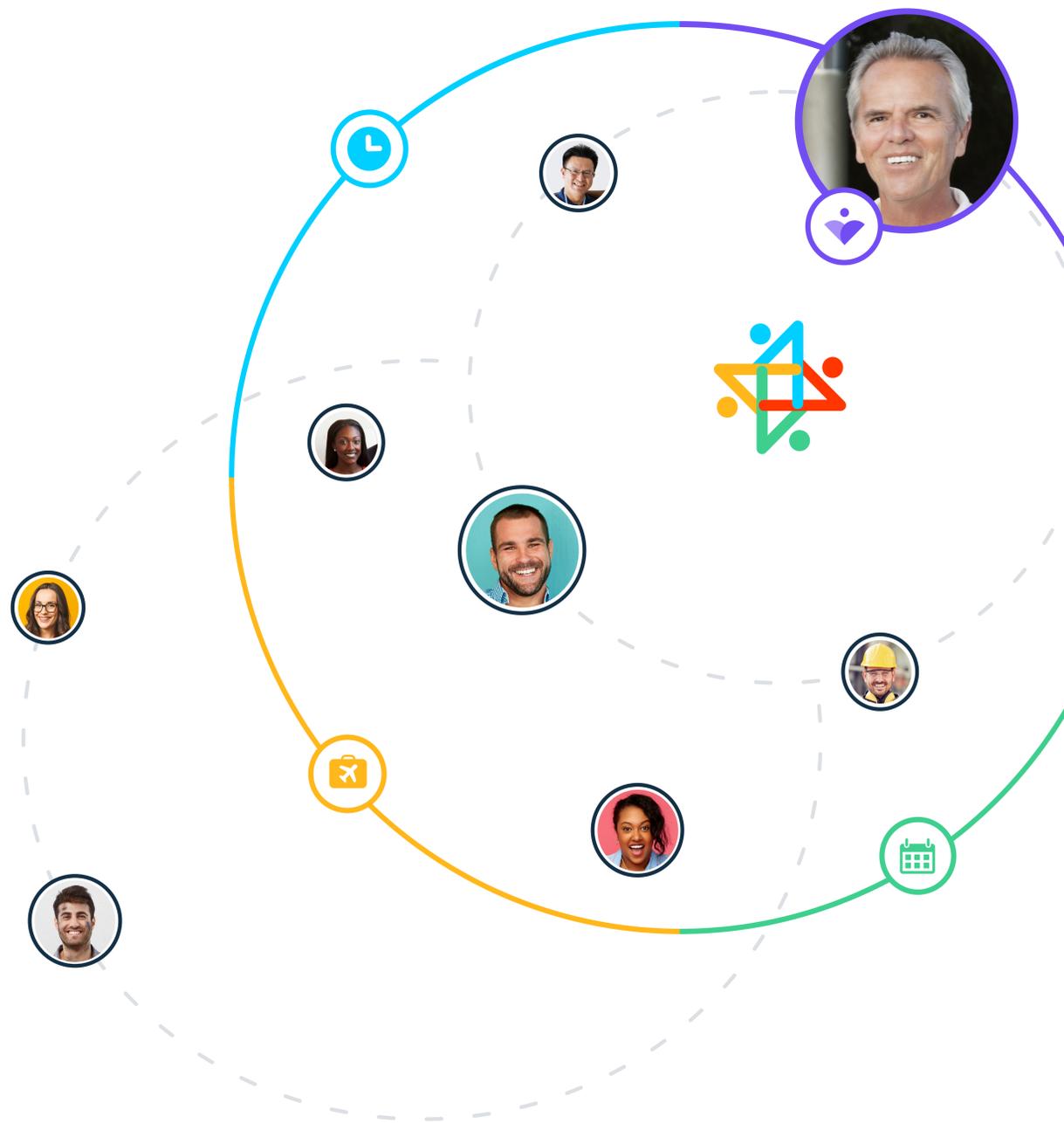


# The Do's & Don'ts of Transforming Your Workforce



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The world of workforce management (WFM) has changed dramatically, even over the last several years. Cloud-based Software-as-a-Service (SaaS) technology has made enterprise-quality WFM solutions accessible to the small and midsize (SMB) market. As one [Forbes article](#) put it, “Seemingly overnight, there has been an explosion of SaaS companies servicing the SMB market — and to much success ... The massive success of SMB SaaS companies is undeniable, even if still nascent, and is simultaneously disarming the SaaS world.”

At the same time, the role of HR has shifted from once being solely responsible for benefits and employee program administration to now encompassing the entire employee life cycle and the employee experience. No wonder investment in WFM technology continues to boom. According to [Gartner](#), organizations with a large share of hourly and blue-collar workers are particularly continuing to invest heavily in WFM applications to “transform the employee experience, as part of workplace technology and digital workplace transformation initiatives.”

It can all be very confusing.

This guide addresses some of the most common difficulties buyers face and highlights the most important considerations any buyer of WFM technology should keep in mind: ease of use, functionality, customer service, and results of the technology in the trenches.



## **What Is WFM, Anyway — and Why Do I Need It?**

[Gartner](#) has most recently defined WFM as “a solution composed of software, services, and (often) hardware that helps organizations manage the operational deployment of their workers.” In most cases, WFM is deployed for hourly paid workers, although Gartner says it is also seeing demand for WFM for salaried and white-collar workers.

The core elements of WFM include, but certainly aren’t limited to:

- Tracking, managing, and planning for time and attendance
- Administering and tracking scheduling and shifts
- Administering and managing time off
- Centralizing, securely storing, and being able to access people data for reporting and planning

A WFM solution is critical not only for managing those functions today, but for accurately planning and forecasting your future budget, staffing, and scheduling needs. Without a WFM solution that fits your needs, you, your staff, and your employees will very likely continue to:

- **Spend unnecessary hours each week on paperwork and manual HR administration:** Especially for such tasks as scheduling and time tracking, with time wasted revising schedules by hand instead of with the click of a button.
- **Struggle to manage a mobile workforce across multiple worksites:** That's why workforce management software can have the biggest impact for businesses in the dining and hospitality markets — and for other businesses that have a complex structure with differing levels of full- and part-time staff, seasonal staff, or seasonal operating hours.
- **Fall behind to the competition:** Other companies will leverage new technology and software for a competitive advantage that empowers their staff and gives their employees and customers memorable experiences that keep them happy.



## **Question 1: Should I Buy Point Solutions, a WFM Platform, or Some Combination of Both?**

The world of WFM technology is continuing to evolve, but it still comprises two overarching groups of vendors: point solutions (sometimes called “functional specialist” or “business application” vendors) and platform solutions [both WFM and human capital management (HCM) vendors].

Determining the best tech strategy for your organization depends largely depends on two factors:

- How complex your WFM needs are
- How tightly or seamlessly you want your time, attendance, and scheduling to integrate with wider work tech functions, such as payroll

Point solutions often have the advantage of having deep expertise in the specific slice of WFM they're built to address. But they can lack integration with other pieces of your WFM functions. HCM suites, meanwhile, can include WFM functionality, but they often lack the robustness and level of configurability of platforms or suites that are designed and built from the ground up to serve WFM needs.

The best of both worlds may be a WFM suite or platform that lets you select (and pay for) only the modules you need today, knowing you can easily add other functionality later. With the right vendor in this scenario, you benefit from rich WFM expertise, and you don't pay for unnecessary bells and whistles you won't use even after you've paid for them. The right vendor will also have pre-built integrations and APIs for truly easy system integration not only among your WFM modules, but also with leading payroll, HCM, and ERP systems. Finally, a WFM platform that grows with you means you won't face surprising fees or new startup costs as your needs grow.



## **Question 2: Do I Need Time Tracking or Clocking Solutions? Why – and What to Buy?**

The need for accurate time tracking cannot be overstated. Every company has policies on work hours, breaks, and other time-related issues, and those policies should be unambiguous for all employees and easy to follow. At the same time, today's workforce is demanding workplace flexibility and the ability to track their time as easily as they conduct their personal consumer affairs. HR leaders, meanwhile, want the same sense of efficiency and ease of use in their time-tracking tools.

The problem is that less-than-optimal time-clocking software won't integrate easily with other WFM tools and lack the ability to prevent buddy punching and other forms of time theft. To tackle the challenge of accurately and efficiently managing time tracking and clocking, you can switch to a robust mobile management solution. It's the best step toward ensuring fast, clear communication, spotting time-clocking inconsistencies, and avoiding potential violations of the federal Fair Labor Standards Act and related state and local laws and regulations.

## What to look for in a quality time clock solution

The best time-tracking solution will:

- Simplify time and attendance for leaders, managers, and hourly employees with powerful but easy-to-use time and attendance software — no matter how complex your time-and-attendance requirements and policies are
- Offer mobile applications that guarantee managers and the workforce anywhere, anytime access
- Offer the most modern, next-generation technology in clocks, including biometric, contactless, and rugged, portable time clocks



## Question 3: Do I Need a Dedicated Scheduling Solution? Why — and What to Buy?

Shift scheduling can be one of the most challenging tasks for HR managers. If your managers find themselves going down frustrating, time-consuming rabbit holes as they try to plan who should work when and where, it's probably time to either replace your manual scheduling processes or upgrade your digital solution. Especially if you have a large staff with a lot of varying schedules, manual scheduling or clumsy scheduling software will continue to cost you time and money.

After all, it's not just the work that needs to get done. You need to create a good employee experience by making sure your people receive their required — and expected — breaks and notice of shift changes. Even better is a system that makes it easy for hourly and other non-salaried workers to learn about the available open shifts and easily navigate shift swaps.

Scheduling is about a lot more than allocating the right tasks to the right people at the right times. Today, the right scheduling software also helps HR leaders be strategic partners. It can help you determine if you're under or overstaffed, by role or worksite. It can help you reduce overall costs and resources by eliminating the need to manually delegate work and shifts.

Without a modern, cloud-based, mobile scheduling solution, you run the risk of lower employee engagement, higher labor-law compliance risks, and continued wasted time for managers and front-line workers. Without mobile scheduling software, it's nearly impossible to manage complex shift arrangements or modify schedules in real time.

### **What to look for in a quality scheduling solution**

The best scheduling solutions will:

- Empower managers to quickly, accurately, and easily create schedules for any department or worksite, with features designed to meet your company's unique scheduling needs
- Provide readily available insight into the workplace and compliance implications of scheduling from an easy-to-read dashboard
- Allow workers to easily conduct shift swapping and get fast approvals
- Enable managers to efficiently plan staffing needs from any device
- Eliminate labor-compliance headaches thanks to built-in and configurable rules
- Meet the most complex scheduling requirements, including management of shift patterns and rules-based scheduling, with detailed timesheet audit trail capabilities to track the entire history of any punch
- Offer a scheduling recommendation engine to give managers even more time back to be more pro



## **Question 4: Do I Need Dedicated Technology for Managing Time Off? Why – and What to Buy?**

As your company grows, it becomes increasingly challenging to keep track of employee vacation times, leaves of all kinds, sick days, remote work, and other reasons your non-salaried employees need to miss work. Doing it manually or with home-grown programs can demand time and resources that would be better spent on better supporting initiatives that will drive company and employee success.

Dedicated time-off software removes the tediousness of managing time off, no matter how complex your rules and scheduling requirements are. It makes the chore easier, faster, and less susceptible to errors and compliance infractions. One other key advantage of using software to manage time off is its ability to centralize all of your time-off data.

Administrators and managers can find any details of employees they need at any time, while employees can send time off requests digitally, and employees and managers have complete transparency into how much leave they have and more. You can also track unused PTO and be notified of potential compliance risks related to scheduling — two big concerns for growing companies.

### **What to look for in a quality scheduling solution**

The best modern scheduling solutions will:

- Enable you to manage leave and time off far beyond “hours available” and “accruals” — it will also include reporting, FMLA, and time-off policies
- Allow full management and analysis of centralized leave and time-off data
- Include expanded, highly flexible, and toolbox-accessible configurations and scopes for time-off management
- Deliver full visibility into scheduling trends and patterns, giving leaders and managers at-a-glance insight for strategic planning



## Question 5: Do I Need Dedicated Technology for Managing All of My HR Data? Why – and What to Buy?

HR has become a vital business operation and strategic ally. HR's job is not only to onboard employees and manage the employee life cycle, but it should also keep a pulse on HR data — everything from the amount of time off used in a quarter to shifts that needed to be filled suddenly in any given department to measures of employee sentiment at any point in time. That's why over [97% of HR departments](#) gather metrics.

Yet a whopping 95.5% of HR professionals say they have problems with gathering and analyzing HR metrics. The usual reasons are:

- Data systems that are poorly integrated
- Their technology is inefficient and cumbersome (built for the needs of the enterprise user rather than a company with less than 250 or so employees)
- Their data management software is too shallow to meet the needs of a small or midsize user with complex requirements for time tracking, time-off management, scheduling, and HR planning
- HR leaders are unsure what to measure and get little vendor consultative support

Accessible, accurate, and meaningful data will significantly increase your ability to know what's really happening in your organization and how to act on it, and how to predict what will happen next.

## What to look for in a quality HR data management solution

The best solutions for HR data management will:

- Put efficiency, effectiveness, and ease of use into every corner of HR data management — regardless of the size of your company or complexity of your needs
- Offer centralized and secure document storage, retrieval, reporting, and updates
- Provide easy and accurate configuration of benefit plans, using smart technology to configure even the most complex plans
- All HR and other leaders to see all trainings — past, present, and future — from any device, anywhere
- Know where every asset is — or needs to be



## Go Where Your Smart Questions and Clear Answers Lead You

As you ask and answer the right questions to determine what WFM technology is right for your company, it becomes obvious that you should first look for a vendor that offers a suite of products designed and built specifically to handle WFM — but that lets you buy only the modules you need today, with the opportunity to easily expand your technology lineup as you grow and evolve. Second, your vendor should offer practical, proven integration across all of your WFM products — and with other HR processes — to ensure seamless workforce management and data access.

In addition, the right WFM solution will include:

- **Technology and services that deliver EASYness in workforce management, in companies of every size:** One example of EASYness is having easier, faster access to meaningful, real-time data in every WFM module and across the entire platform. This ensures more confident decision-making every step of the way, every day.

- **WFM technology that helps you create workforce superstars and drive workforce transformation.** Think about the day-to-day as well as strategic benefits you'll gain with advanced time tracking and scheduling to support the simplest to most complex scheduling requirements, including shift patterns and rules-based scheduling, with detailed time sheet audit trail capabilities to track the entire history of any punch, and a
- scheduling recommendation engine.

**Technology that you can very likely afford while delivering a remarkable, results-driven experience at every rung of the company ladder:** For you and your managers, this means having dashboards with insightful, actionable, and user-selected widgets that present you with summarized, actionable information (instead of requiring you to run reports for the same data every time you need it).

- **Fast processing and powerful, efficient automation and workflows for everyday HR tasks and data gathering:** This should include automatic notifications to you and managers when a shift is not filled, and pre-calculated data at rest for a highly responsive UI/UX and faster reports and exports.
- **Data integration with other HR processes to ensure seamless workforce management and data access.**

**Want to see how the EasyWorkforce platform can deliver all of that to you?**

**Let's Talk!**

**EasyWorkforce**

**Make your people happy**