

Shiftboard Helps Overcome Strategic Challenges by Lowering Labor Costs, Turnover, Compliance Risks

Shiftboard

Best Advance in Time and Labor Management (Time and Attendance, Scheduling, Absence and Leave Management, Compliance, Self-Service)

January 2020



Company Background



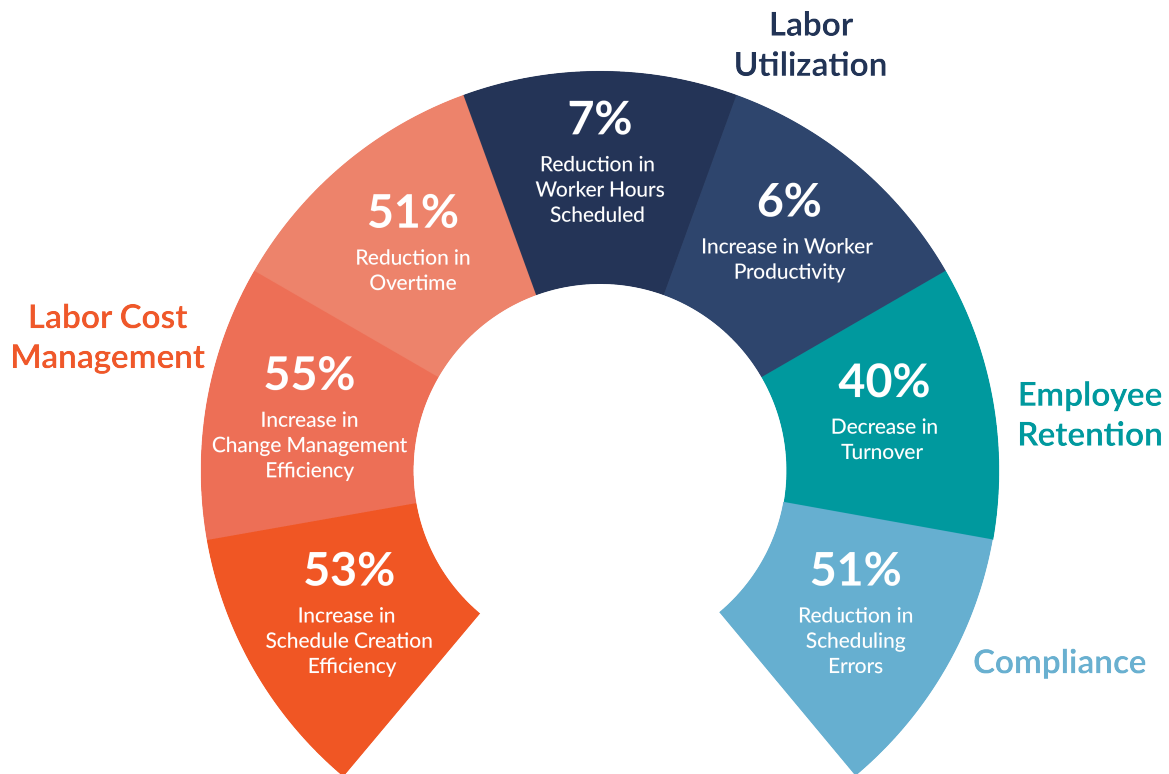
Company-at-a-Glance	Shiftboard
Headquarters	Seattle, WA
Year Founded	2008
Employees	60-plus
Global Scale	North America, Europe, Australia
Customers/Output, etc. (Key customers and services offered)	Shiftboard serves thousands of customers across a number of industries including healthcare, manufacturing, staffing, venue management, call centers, hospitality, logistics, and education. Through automation, Shiftboard improves workforce scheduling operations, lowering labor costs while increasing employee productivity and engagement.
Industry	Workforce Management Technology (SaaS)
Website	www.shiftboard.com

Value Proposition

The workforce scheduling software market is relatively young and growing quickly. Many companies (even large enterprises) have been leveraging simple tools such as Excel to help manage the process of scheduling workers. As these businesses look to more sophisticated scheduling solutions, some are looking to help improve scheduling efficiency through automation. Others are looking at scheduling more strategically. Shiftboard is highly focused and built to serve customers seeking to solve more strategic business challenges. These challenges include labor-cost optimization, worker retention, compliance and scaling operations to support revenue growth. Companies with a more strategic focus on scheduling tend to be larger with hundreds to thousands of workers spread across multiple locations.

Shiftboard's value goes well beyond creating employee schedules efficiently (which it does well, increasing scheduling efficiency by as much as 53%). Using Shiftboard, customers also:

- Lower labor costs by reducing the total number of hours scheduled by an average of 7.4% through AI-based intelligent labor forecasting and scheduling. The Shiftboard platform also helps customers better control overtime, reducing it on average 51%
- Drive revenue growth. Shiftboard enables its customers to optimize labor utilization and shift coverage to fulfill production needs and service more customers. With Shiftboard, customers make employees 6.2% more productive
- Decrease regrettable worker turnover by 40% through providing employees greater control over their work schedule and their work-life balance, and as a result, significantly increasing their job satisfaction
- Lower labor law and regulatory compliance risk through eliminating worker scheduling errors by 51%

Figure 1: Shiftboard Customer Survey, October 2017


All illustrations provided by Shiftboard

“Two years ago, we launched a strategic employee scheduling initiative to leverage our employees’ preferences while increasing productivity and retention numbers. The initiative has helped create a healthier, more productive workplace while also saving our organization time and money.” — Wes Swearingin, SVP of operations at Medline

Product or Program Innovation

Shiftboard is advancing the scheduling market through innovative technology specifically designed to serve organizations with larger workforces in need of highly intelligent workforce scheduling capabilities. The company has introduced three key initiatives in 2019 to address this need in the market.

New User Interface

In 2019, Shiftboard introduced a completely redesigned mobile-first user interface to radically improve the productivity of three key stakeholders within the scheduling dynamic of large workforce operations. The three dashboard views available are:

- **Admin View** — Provides advanced capabilities and configurability for “power” schedulers and system administrators.

- **Manager View** — Shiftboard's unique “manager-on-the-go” dashboard is specifically designed for front-line managers who need to make on-the-spot scheduling decisions to keep the business running smoothly. It enables line managers to quickly fill open shifts, confirm and manage call-outs, and approve timecards.
- **Worker View** — Provides shift workers with a simple, intuitive interface to check schedules, confirm assignment details, swap shifts and clock in and out.

Figure 2: Shiftboard User Interface



Compliance Pack

This new innovation helps companies track and manage compliance with the many complex labor laws that govern hourly workers. These rules range from laws that control overtime pay to regulations that dictate how far in advance employers must publish work schedules. There are also numerous scheduling-related rules derived from industry standards, such as the caregiver-patient ratios which are regulated in the healthcare field. Collective bargaining agreements (CBAs) with labor unions are other rules that regulate employee issues such as seniority and mandatory break periods. Shiftboard's sophisticated platform helps workforce managers navigate the complex landscape of compliance in several user-friendly ways:

- **Labor Contract Tracking** — Tracks labor contracts and only schedules those workers with an active contract by the time the shift needs to be worked
- **Credential Tracking** — Tracks worker training and credentials and only schedules those who are eligible to work
- **Seniority Scheduling** — Express-rank or time-seniority preferences can be applied when scheduling workers

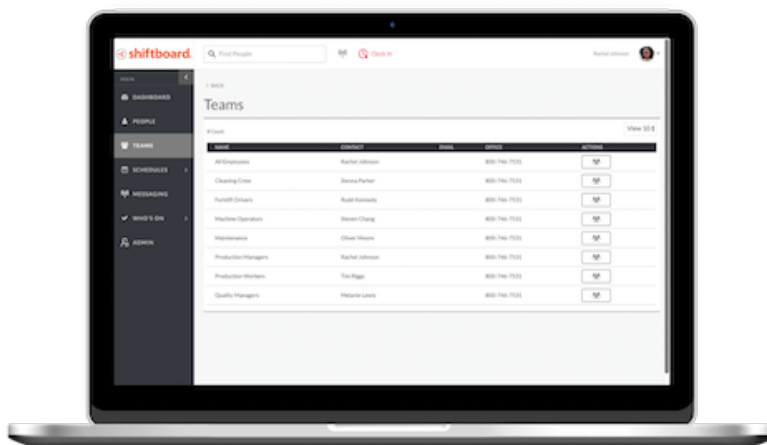
- **Compliance Alerts** — Notifies any employee of an expiring training or license requirement
- **Mandatory Rest Period** — Defines and automatically limits scheduling workers based on mandatory rest periods
- **SMS Opt-in** — Requires workers to formally opt-in to text communication in support of GDPR and other privacy regulations.

Virtual Teams

Shiftboard simplifies workforce scheduling for companies with larger, multi-location workforces and virtual teams. Shiftboard enables managers to organize their workforce based on a wide variety of criteria: by role, location, skill set or even performance rating. The virtual teams structure makes it easier for managers to schedule and communicate with the right people, at just the right time. Benefits of using Shiftboard teams includes:

- **Multi-team** — Workers can be assigned to multiple teams as needed, making the “teams approach” incredibly flexible
- **Auto Team Assign** — Managers are able to quickly add new people automatically to teams based on assignment rules, making team roster management simple.
- **Bulk Shift Assign** — Assign shifts to all members of a team based upon preset scheduling rules
- **Team Controls** — Set controls that limit workers access to only their assigned teams or allow them to join ones independently

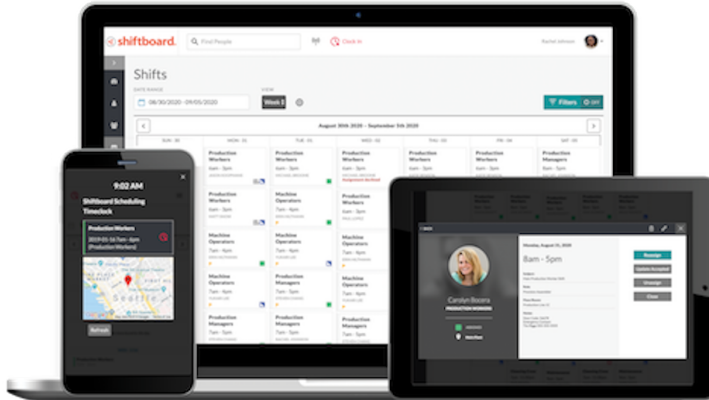
Figure 3: Virtual Teams



Unique Differentiators

Shiftboard delivers the market's first configurable workforce scheduling solution designed specifically for large organizations that schedule highly mobile, multi-site workforces.

- **AI-based Intelligent Scheduling** — Involves both labor forecasting and shift assignment. Shiftboard's compliance tracking tools can be configured to only assign shifts to those who are eligible to work based on overtime rules, seniority preferences, credentials and more.
- **Best-in-class Configurability** — Shiftboard is not an "out of the box" software. It's highly configurable to serve organizations with more sophisticated scheduling requirements, across a range of industries.
- **Scheduling at Scale** — The mobile-first solution caters to the specific needs of all three stakeholders in a large, dynamic workforce scheduling environment. These stakeholders include schedulers, line managers and shift workers of all types.
- **Integrated Communication** — Integrated, real-time communication empowers quick responsiveness to all workers or select worker groups. Real-time communication is critical for effective scheduling because it ensures managers and workers are well-informed at all points in time. Automatic, event-based triggered communication can alert managers to activities such as a worker taking a shift or someone completing a shift-trade. Additionally, Shiftboard's new user interface empowers workers with anytime access to their schedule and provides them with a direct communication link to their manager.
- **Highly Personalized Service** — A dedicated customer success team provides ongoing support to ensure effective adoption and long-term success with Shiftboard. Unlike its competitors, Shiftboard considers itself a business partner and is committed to ensuring customers meet their business goals.

Figure 4: Shiftboard's Configurable Workforce Scheduling Solution

Measurable Results

Customer Case Study: Wellness Corporate Solutions

Wellness Corporate Solutions (WCS) provides comprehensive employee wellness programs to clients ranging from small law firms to Fortune 100 companies. WCS staffs a nationwide network of more than 8,400 highly skilled, mobile healthcare professionals.

Before Shiftboard, a team of WCS support staff used calendars and spreadsheets to do everything from manage recruiting and schedule creation to tracking certifications and time-off requests.

Creating schedules for these workers was especially complex and required cross-checking skills, credentials and availability against multiple locations and events. Manual tools made it difficult to optimize schedules with so many variables.

Due to the complexity involved, WCS employed three full-time staff just to manage the inefficiencies of its manual processes:

- One position to manage employee documentation and ensure credentials
- One position to manage the schedule across multiple spreadsheets
- One position to communicate schedule changes to workers

Shiftboard's flexibility provided WCS with an affordable, configurable solution with many benefits:

Reduced Labor Costs

As mentioned previously, WCS employed three full-time workers to manually track documents, create schedules and communicate schedule changes to their workforce. By

using Shiftboard to handle those scheduling and communications processes, WCS was able to save more than \$107,000 annually in labor costs.

Increased Revenue

Before Shiftboard, WCS stored scheduling information across multiple spreadsheets and the inefficient process limited the number of active clients WCS could take on at one time. With Shiftboard, there are no limits on the number of clients, employees, locations or placements that can be tracked and incorporated into a schedule. As a result, WCS has grown their client base by more than 11 times.

Better Communication

Prior to implementing Shiftboard, WCS support staff relied on one-off conversations and outreach to manage day-of logistics. Now, Shiftboard makes it easier to manage healthcare workers on the day of the event, providing a seamless communication tool for their candidates, recruiters and clients.

Easier Last-Minute Changes

By storing workforce information in Shiftboard, it's easier to find highly qualified candidates at a moment's notice. Shiftboard allows WCS to easily sort its workforce roster to quickly fill placements with appropriately trained, local staff. Once the correct person is identified, Shiftboard automatically sends a message containing all of the pertinent details.

More Efficient Scheduling

Before Shiftboard, manual processes made scheduling cumbersome and inflexible. WCS can now send out notifications for open placements and allows workers to pick up shifts based on rules set by administrators.

For example, employees can cancel a shift two weeks in advance without management involvement. When a worker turns down a placement, an automatic message goes out to the local qualified candidates alerting them that a new shift is available. Before Shiftboard, WCS had a dedicated employee manually broadcasting placement changes, but Shiftboard automated this task.

Certification Tracking

WCS is legally required to track healthcare worker credentials and certifications, such as RNs and CPNs. With Shiftboard, certifications are tracked and verified within each worker's Shiftboard Profile, which provides easy access to all worker data, including certifications, experience and performance data. WCS recruiters can pull reports to check certification expiration dates and use Shiftboard to remind workers when they need to renew.

Consolidated Data

Before Shiftboard, WCS information was spread across multiple tools, making it cumbersome for recruiters, data analysts and trainers to find information. With Shiftboard, all systems and data have been integrated into a single source of information and communication.

Application and Registration

WCS has seven job types that need to remain filled, so they are constantly recruiting for these positions. The process involves posting the job descriptions online, filtering applications, followed by conducting interviews. By tracking open positions, applicants and onboarding documents, Shiftboard streamlines the application and registration process.

“Thinking back to our business before Shiftboard, I can’t believe we did it any other way. We’ve become so much more efficient in countless ways. With Shiftboard, our coordinators not only have the capacity to manage more events, but also give more attention than ever to each client’s specific needs.” — **Ashley Silbert**, Senior Manager of Talent Acquisition, Wellness Corporate Solutions

Customer Case Study: London Metropolitan Police (UK)

With more than 31,000 police officers, the London Metropolitan Police Service (MPS) is the largest police force in the United Kingdom (UK). The MPS are responsible for law enforcement within the Metropolitan Police District, which consists of 32 London boroughs and is home to a population of 8.8 million residents.

By providing one master calendar that all borough commanders could trust for accuracy and access at any time, Shiftboard eliminated hundreds of wasted hours spent creating manual schedules. This helped the MPS reduce schedule management by more than 80%, freeing up borough commanders to focus more of their time on their policing responsibilities instead of time-consuming administrative tasks.

The Challenge

Metropolitan Police employed a manual and decentralized process to schedule its specialist police staff. Specialists are highly skilled police officers called at a moment’s notice to investigate complex cases throughout the district.

The manual process for scheduling these staff was laborious, expensive and time-consuming. Change management was highly complex and the accuracy of the work schedules was always in question. Additionally, because commanders lacked visibility into specialist schedules across each of boroughs, there was an ongoing risk to labor law compliance and employee burnout resulting from unequal shift distribution.

Dave Jackson, chief superintendent of the MPS described the situation this way: “The process in place simply wasn’t working. We urgently needed to find a solution.” The MPS turned to Shiftboard to solve its scheduling challenges.

High Operational Visibility

MPS officers are dispersed throughout the district. Most specialists work across boroughs or from remote locations, which is difficult to keep track of in real-time. Working with Shiftboard, scheduling managers now have real-time visibility into the dispersed workforce. All commanders share a single view of the on-call rotas and instant access to officer profiles.

This has greatly improved transparency and allowed MPS scheduling staff to feel more confident in the on-call rotations, as well as the schedule. Now, when a scheduling manager calls out an officer at 4 a.m., they can feel confident they are sending out the correct officer for the job.

24/7 Self-service Capability

Shiftboard provides MPS specialist officers with visibility into the real-time schedule, too. Officers now understand where and when their colleagues are assigned shifts. This level of transparency into the process builds morale and trust, and prevents resentment from building from perceived unequal shift distribution. Shiftboard also provides officers with the capability to pick up shifts, trade shifts or request time off from any device, anywhere. This level of self-service empowers staff to better manage work with life, which is an ongoing challenge for police officers in general.

Communication Tools

MPS schedules a dispersed workforce across multiple locations 365 days a year. Regular, last-minute changes are inevitable, so distributing large amounts of information in real-time is critical to effective operations.

By implementing Shiftboard’s targeted communication tools, MPS can easily communicate future shifts and changes to shifts in real-time. Shiftboard’s tools connect every on-call officer to the scheduling manager and each other, enhancing visibility and improving communication district-wide. Staffing managers can find exactly the staff they are looking for and contact them instantly via email or text. They can also automate reminders and announcements to go out to specific officers or teams.

Shift Planning and Management

With Shiftboard, staffing managers can now have trust in the scheduling system. Real-time shift changes can occur with better coordination allowing for greater responsiveness for critical operations. Automating key processes such as overtime and credential

tracking, it allows staff to be scheduled more quickly with fewer scheduling errors or gaps in coverage. One central source of truth for managing the workforce gives borough commanders more confidence in the rotas. Automating the scheduling process has resulted in significant time savings across district for everyone from commanders to managers to police officers.

An End-to-end Scheduling Solution

For the MPS, Shiftboard has become a strategic operational asset. From increasing transparency and confidence in the rotas to monitoring shifts in real-time and communicating updates, Shiftboard has become a central component to the operational excellence of one of world's largest metropolitan police forces.

About Brandon Hall Group

Brandon Hall Group is an HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management. With more than 10,000 clients globally and more than 25 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Inspiring a Better Workplace Experience

Our mission: Empower excellence in organizations around the world through our research and tools every day. At the core of our offerings is a Membership Program that combines research, benchmarking and unlimited access to data and analysts. The Membership Program offers insights and best practices to enable executives and practitioners to make the right decisions about people, processes, and systems, coalesced with analyst advisory services which aim to put the research into action in a way that is practical and efficient.

Membership Offers Tailored Support

Our membership delivers much more than research. Membership provides you direct access to our seasoned team of thought leaders dedicated to your success, backed by a rich member community, and proactive support from our client services team.

RESEARCH ACCESS & EVENTS

- Reports
- Case Studies, Frameworks & Tools
- DataNow® & TotalTech®
- Webinars and Research Spotlights
- Annual HCM Conference

ADVISORY SUPPORT

- Ask the Expert
- 1 on 1 Consultations
- Research Briefings
- Benchmarking

CLIENT SUCCESS PLAN

- Your Priorities
- Executive Sponsor
- Client Associate
- Monthly Meetings

Strategic Consulting Offers Expert Solution Development

Our consulting draws on constantly updated research and hundreds of case studies from around the globe. We provide services that simplify and target efforts to produce business results.

BENCHMARKING

- Competitive/Comparative
- Maturity Model
- Custom Research

STRATEGY

- Business Case
- Planning
- Organization & Governance

TECHNOLOGY SELECTION

- Vendor Selection
- Architecture Design
- Systems Evaluation

DEVELOPMENT & INTEGRATION

- Program Design
- Assessment
- Survey
- Process Integration

For more information, contact us at success@brandonhall.com.