

A man and a woman are sitting at a table in a cafe, looking at a laptop screen together. The woman is smiling and pointing at the screen. The man is wearing glasses and looking at the screen. The background is a blurred cafe interior with wooden tables and chairs.

# 5 Workforce Management Secrets to Thrive in 2021 and Beyond

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# Introduction

When substantial lockdowns and restrictions began in early 2020, you likely discovered vulnerabilities in your operating models quickly revealing themselves and perhaps found yourself scrambling to find solutions that would keep your doors open and your people employed. The road to reopening has been paved with false starts, everchanging guidelines and mandates, and—for many—the fear of the unknown. With no definite end to the pandemic in sight, your response needs to help you survive short-term and prepare you to thrive long-term when unforeseen circumstances require your organization to pivot again in the future. This means adjusting and accelerating your approach to several trends that have been underway for years, including:

- Modernizing your operating model
- Enabling operational agility
- Migrating critical business systems to the cloud
- Adopting new and emerging technology like artificial intelligence (AI) and machine learning
- Elevating employee engagement

The common thread among these five trends is undoubtedly the foundation of any organization: its people. To set the right expectations and execute solutions, you need to rely heavily on your workforce to keep the needle moving. An effective workforce management strategy is key. Capable, efficient, predictive technology is an inarguable necessity for organizations—be it labor forecasting built on machine learning, cloud-based solutions for scheduling or time and attendance, mobile employee self-service bolstered by AI, or other options. In this eBook, you will learn why embracing and accelerating these five trends in your workforce management strategy will set you up for success even when the unexpected strikes.





## Secret #1

# Accelerating a Change in Your Operating Model

The lockdowns of 2020 have demonstrated the importance of modernizing the way organizations conduct business. Driving much of this modernization is a push across industries to contain costs in order to thrive during and after the pandemic. According to [recent research from Deloitte](#), “2 in 3 companies globally now expect to pursue cost reduction over the next 12 months.” The same research notes that 72% of companies globally seek to “enable pre-sale, sale, and post-sale activities through digital channels,” and “the most popular strategy for customer engagement will be to shift most transactions to digital channels,” which the research pegs at 75%. This shift is most obvious in the media where many organizations are running advertising about simplifying people’s lives while keeping them safe. For instance:

- **Expanding or refitting operations** to bring a new product or service to market or fulfill a shortage in the supply chain can bring new life to your balance sheet.
- **Implementation of remote monitoring** for field operations and offsite equipment to troubleshoot, diagnose, and plan maintenance and repairs more effectively.
- **Platformification** of events, education, entertainment, fitness, financial services, healthcare, and more enables organizations to bring historically live, in-person events, courses, and appointments into people’s homes with interactive experiences that engage participants.

- **Online appointment scheduling**—whether virtual or in-person appointments—minimizes wait times, promotes social distancing, and provides a more personalized experience.
- **Video conferencing, instant chat tools, and digital assistants** enable connected and productive work-from-anywhere arrangements.
- **Call, chat, and email bots that simulate human interaction** act as a first line of defense to ease wait times when a shift to digital channels results in a spike in online, phone, or email inquiries.
- **New product delivery initiatives like buy online and pickup in store (BOPIS)** services that allow customers to initiate a transaction online, but finalize in person. Other options might include curbside pickup, local delivery, and contactless options, which translate well to the restaurant and hospitality industries.

Regardless of your industry, the adaptations you have deployed (or plan to deploy) in your product and service offerings will have a material impact on your workforce, including how, when, and where they perform their work. When making such sweeping changes, you won’t always get it right the first time around. You’ll need to monitor your workforce’s progress and continually refine your approach in order to elevate the customer experience, help ensure employee and customer safety, maintain productivity, preserve an unbroken supply chain, and more. Excessively manual technology that contains clumsy workarounds or redundant data entry will diminish your control over costs and get in the way of achieving the true value from your digital transformation.





## How Will a Workforce Management Solution Help You Thrive?

The variables are endless in a post-2020 reality, and adaptations to your operating model can have major repercussions throughout your organization. These adaptations can't always happen overnight and often require a phased approach. The right workforce management solution is the linchpin to making the most of a change in your operating model by informing a logical rollout that considers your workforce availability at any given time. For example:

- Cross-training becomes possible as the system automatically pairs skilled employees with those less experienced, enabling skill share and career development.
- Data from labor forecasting projections can inform staffing needs throughout the rollout and enable strategic decision making related to recruiting and training and development efforts.
- Modern technology can differentiate between core hours and flex hours to ensure your organization has coverage.
- The right solution can build and support hybrid schedules that communicate when employees are expected to be working onsite or offsite.
- Mobile capabilities provide accurate time and labor data and inform decisions with greater visibility into the effort needed to perform tasks and how employees are distributed in the field.
- Labor forecasting and demand-driven scheduling easily accommodate the refinement of a new operating model and allow for a swift response to shifting responsibilities as adoption rate trends emerge.



## Secret #2

# Optimizing Operational Agility

According to PwC's [23rd Annual Global CEO Survey](#), 83% of U.S. CEOs were planning operational efficiencies for 2020 to help drive growth. When overhauling your product and service offerings, it is only natural for these efforts to require continual refinement as unforeseen disruptions increase in frequency. To act quickly and accurately, you need to equip your organization with tools that maximize productivity, ensure regulatory compliance, minimize unnecessary labor spend, unite the global organization, and increase the pace of innovation.

Plenty of unexpected challenges call for operational agility. A natural disaster may require a rapid ramp-up in the deployment of technicians, equipment operators, and call center support. A last-minute sales order for manufacturers may necessitate an extra shift or line. A parade or market event could affect the rate of foot traffic at a store location. Your organization needs the ability to adapt quickly to minimize inefficiencies and any lingering consequences.

### Expect New Scenarios to Emerge

What if an increase in the demand of one of your offerings necessitates the rapid opening of a new location or expansion of a team? What if you've been tasked with the challenge of enforcing mask and other pandemic-related mandates, requiring you to monitor local businesses and investigate complaints? With sophisticated functionality for labor

forecasting in place, you can predict the required headcount with consistent accuracy as the future unfolds—whether the spike in demand is temporary or persistent. The right workforce management system will help control unanticipated labor costs to keep your budgets on track, maintain compliance with all applicable laws and contractual obligations, and ease decision making on whether an overtime or contingent labor strategy would be a viable option to supplement temporary spikes in demand rather than recruiting new workers.

Be prepared to think with a new perspective. For example, if your employees will be working from home long-term, you may find that their work is truly task-based and thus could benefit from a flexible system that empowers your team to add tasks to the schedule, track productivity, and manage related performance incentives for pay. Your organization may also discover a need for job-driven scheduling as new tasks such as curbside pickup, remote supervision of field crews, hybrid onsite-offsite shift models, and additional pandemic-spurred changes affect the schedule much more than ever before.



## How Will a Workforce Management Solution Help You Thrive?

Enabling a quick and accurate response to new opportunities or disruptions is key to thriving in these unprecedented times. A modern and robust workforce management platform is a critical component in removing administrative burdens and inefficiencies to optimize your organization's operational agility, including:

- Accurately anticipating and refining your labor needs based on historical and critical business data, recent or emerging trends in the data, and your organization's key performance indicators.
- Automatically generating and filling optimized schedules that place top talent when and where they are needed most to achieve business goals and, as needs grow, ensure scheduled staff have proper licensing and certification, hard and soft skills, and other qualifications.
- Identifying gaps in coverage and automating compliant facilitation of shift offers to the most suitable respondent(s) based on the defined criteria.
- Predictive and proactive alerts when employees are at risk of incurring overtime or violating legislative or contractual policies to address the issue before it becomes a problem.
- Access to diverse time capture options—physical and virtual time clocks, mobile options, and integration with third-party applications and devices—to quickly transition between offsite and onsite work.
- A robust rules-based engine that accurately automates all your unique rules with effective dates to ensure the rules are enforced during applicable periods, including the calculation of retroactive rules changes, especially those that span multiple periods and employees.



## Secret #3

# Move to the Cloud



According to [IDG's 2020 Cloud Computing Study](#), 92% of organizations' IT environments are at least somewhat in the cloud today, with only 8% responding that their total IT environment is entirely on-premise. As 2020 commenced, you may have been one of those organizations still waiting to migrate to the cloud. The rationale to wait may have been related to sunk costs, compliance concerns, or it may have been cultural. Whatever the reason, without cloud systems in place, operational agility is nearly impossible to optimize and maintain as inefficiencies inevitably become unmanageable.

With all of the disruption in the wake of COVID-19, your business is simply moving too fast for your enterprise to be bound by clunky, slow, poorly integrated on-premise legacy software. An old set-up makes working from home nearly impossible, and that's not the end of it. With workforce management cloud systems, organizations have the underpinnings in place to manage and support diverse, simultaneous, or asynchronous employee groups—from those working onsite or from home, to those who are in the field or stationed at any number of locations across a wide geographic footprint.

## Immediacy

Especially in a work-from-home situation, there is likely limited or no staff at the office where on-premise software would be installed, making the immediacy of availability extremely important. A very good example is employee self-service, which can be a genuine challenge for on-premise technology to accommodate. After sending your staff to work from home earlier this year, your organization may have quickly noticed the limitations of its on-premise software. There's no doubt that these limitations will persist post-pandemic, and the future implications could be detrimental. Employees today expect to see their schedules posted in the portal. Scheduling managers need the ability to manage flexible work arrangements, ensure coverage, manage any increase in absences, and comply with changing regulations and guidelines. Visibility into gross pay before payroll processing occurs is critical, as is the ability to capture time via mobile devices or online or virtual clocks.

What are the consequences of a lack of immediacy in employee self-service? Aside from dampening employee engagement and productivity, the situation significantly increases the administrative load for your HR and administration staff, ballooning labor spend as they field phone calls and emails from employees who can no longer manage the basics of their employment themselves. With this influx comes an increased risk for noncompliance and the potentially hefty fees that follow.







## Security and Updates

Consider IT's ability to participate and how this effects updates to the on-premise software. Depending on when and whether your organization decides to call the workforce back to the physical office, your IT staff may find themselves attempting to update software remotely if at all possible. Alternatively, your organization may have to do without updates altogether. These updates could be critical in helping to ensure compliance and given the flood of executive orders in response to the pandemic, your organization runs even more risk.

Depending on an organization's size and geographic footprint, it is not unheard of for an employer to have more than 50 individual systems for workforce management in place. Threading together a tapestry of multiple systems adds a complexity IT simply can't endure. Post-2020, the trend in fast-mounting regulations may continue, and organizations without an automatically updating, single solution in the cloud will struggle to track changes and navigate security and data compliance. Keeping up to date across multiple regions and systems can be highly challenging and exposes organizations to significant risks. Software companies will often employ subject matter experts dedicated solely to these activities, which can free up your IT staff to focus on the backlog of IT requests that support your business goals.

## How Will a Workforce Management Solution Help You Thrive?

With workforce management technology being one of the most high-touch, high-transaction business critical systems, migrating your workforce management strategy to the cloud should be a #1 consideration when it comes to thriving now and post-pandemic. For example, a solution can help:

- Enable all data with broad visibility across the enterprise and strategic insights that drive decision making.
- Eliminate the high cost of maintaining disparate systems accumulated due to niche requirements—for example, unique industry or regional needs or growth through acquisition.
- Avoid the task of attempting to update or maintain an on-premise system remotely—in work-from-home or hybrid work models.
- Save on maintenance of technological infrastructure in order to stay compliant with continually shifting regulations on data privacy and security, which differ greatly across regions.
- Support scale far better than an on-premise system for a suddenly expanded organization—due to a merger or acquisition, the opening of a new location or facility, or organic growth.
- Benefit the complete workforce by supporting real-time access from any device, anywhere to view schedules and pay results, report time, request time off, and more.





## *Secret #4*

# Embrace Technological Innovation

The complexities of regulatory compliance, remote working arrangements, work-life balance, and more were already testing workforce management systems in early 2020. For most, cloud technology is just the first step in embracing technological workforce management innovation. When considering how to support a thriving workplace, your organization must think beyond automation and other conventional technologies to focus not only on AI and machine learning, but other forward-thinking technologies as well.

We have yet to gain a full understanding of organizational leaders' sentiments in the wake of this year, but the most recent findings from PwC's [23rd Annual Global CEO Survey](#) give us a glimpse into the thought processes of chief executives. One year ago, they viewed AI as a potential tool for cutting costs and generating revenue. Trends toward greater technological sophistication in workforce management were already in motion before the COVID-19 pandemic, only now these forward-thinking technologies have proved to be indispensable.



## How Will a Workforce Management Solution Help You Thrive?

Complexities in workforce management have exploded as organizations navigate the challenges of reopening post-lockdown or, for others, remaining viable as they stay in lockdown. Either way, these challenges promise to persist in a post-2020 landscape. The power of cutting-edge technological innovations is critical to efficiency and success. For example:

- AI in a manager's portal helps filter a monumental volume of information and assist in daily administration that can otherwise overwhelm and distract from achieving business KPIs.
- Digital assistants can surface urgent alerts that enable smarter decision making and help managers avoid or address potential compliance issues before they become problematic.
- Employees need to focus on the most important aspects of their work and ignore distractions that aren't as important. AI does this filtering for them.
- Automated shift callouts can prompt or automate employees' contact preferences (e.g., phone call, email, text message) to offer and fill empty shifts that are compliant with union rules and promote fairness.
- Machine-learning labor forecasting can achieve the accuracy in scheduling that organizations need in an environment where next week's schedule suddenly hinges on unexpected disruptions or opportunities.
- Machine learning can help predict customer behaviors to facilitate an accurate match in staffing levels and skills to meet demand, as well as employee and customer expectations.
- Chatbot technology can collect additional information on situations that warrant further investigation, such as unplanned absences or overtime.
- Modern APIs ease integration and allow your organization to complement its workforce management experience with third-party solutions such as data warehouses, unique time collection devices, or applications for robotic process automation.
- AI enables detection of attendance and work patterns that are indicative of non-compliance risks to avoid paying costly fines.

## Secret #5

# Prioritize Employee Experience and Employer Empathy

Every organization's goal is to maximize their employees' level of engagement. Cloud-based workforce management technology and other innovations have finally given employers the ability to exercise empathy with their staff. To increase the quality of your staff's experience in their personal and professional lives, you can ensure that the basics of their employment are seamless and supported by systems that enable operational agility. The benefits to the organization are ultimately cultural and will manifest in greater long-term retention, decreased employee stress and burnout, increased productivity, and greater competitiveness and organizational resilience.

### A Mandate from Organizational Leadership

For CEOs, attracting and retaining top talent has been an annual top concern, often number one in PwC's annual survey. One strong predictor of employees' inclination to stay at their current employer is a metric that organizations have long struggled to address and improve: level of engagement. Common sense suggests that a global pandemic has only strained efforts in this area, but the reality is more interesting. In May, [Gallup found](#) that 38% of employees were engaged at work—the highest since Gallup began tracking the metric in 2000 and a 5% increase from 2017. Before the pandemic, the trend toward greater employee engagement was already undeniable, and it may be that this buoyed an attitude of tight camaraderie as the events of 2020 unfolded.





## How Will a Workforce Management Solution Help You Thrive?

The challenge now is for your organization to harness its employees' surging engagement with tools designed to make their jobs less intrusive by managing work-life balance on their own. Employees who have greater control of their lives outside of work are happier and more productive on the job. For lasting impact, organizations should turn to a workforce management solution for benefits such as:

- Greater visibility into gross hours and pay before payroll is processed and the ability to see and project time-off balances (accounting for both planned usage and accrual rules).
- Full transparency of available regulatory, union, and corporate leave benefits offer clarity on otherwise confusing and counterintuitive employment elements.
- Empowering employees to communicate availability to work additional hours or shifts to minimize disruptions during non-working hours.
- Fair, predictive schedules help ensure employees' working hours don't conflict with other obligations while offering plenty of time to reconcile conflicts.
- Automated callouts account for employee preferences and availability, comply with applicable policies and regulations, and remove any perceived bias.
- Sparing employees from time-consuming administration with mobile-enabled self-service to empower staff to review and confirm timesheets before they are processed, plan time off, stay on track with flexible schedules, and justify overtime.
- Managers' ability to field employee requests on the go without returning to an office space throughout the day.
- Pulse surveys that trigger when trends impacting employee engagement and happiness surface.
- Advanced scheduling and labor forecasting can pair top talent with less experienced workers to aid career development while creating schedules that meet demand and ensure a positive customer experience.
- Consistent and accurate application of rules and policies significantly decreases risks of non-compliance, including litigation, fines, and penalties



## Conclusion

Efficient, flexible, and predictive workforce management is critical to your organization's success amid the massive shifts experienced this past year. To navigate the monumental disruption that has now pervaded most industries, begin by evaluating how your organization can **adapt the operating model** in response to ever-changing business demands. When overhauling your product and service offerings, be prepared to **optimize organizational agility** as these adaptations will unquestionably have an impact on workforce. Leverage your workforce management solution to continuously refine your approach, respond quickly to disruption and opportunity, and maximize productivity.

Of course, operational agility can only be fully optimized and maintained with a cloud system that supports the needs of your entire workforce from any location. With very few foreseeable certainties on the horizon for 2021, the immediacy and reliability of a **cloud-based workforce management system** will ease any unexpected challenges or burdens across your business—from HR to IT and beyond.

Your organization can't afford to wait until everyone does AI first—we're all early adopters now. **Embracing technological innovations** in workforce management is key to maintaining efficiency and success in the face of complexity and uncertainty. You can also harness these workforce management innovations to invest in your organization's most important asset: your employees. Boosting **employee engagement** with convenient self-service tools that allow for greater work-life management creates happier employees who are consequently more productive on the job.

An investment in a workforce management solution will prove indispensable and provide long-term returns for your organization as a highly altered landscape for business promises to persist for the years to come. Make sure your workforce management technology is up to the challenge of empowering your organization to thrive no matter what, today and in the future.




# About WorkForce Software

We empower our customers to follow their own path. Built on 20 years of workforce management innovation including absence and leave management, [the WorkForce Suite](#) adapts to your organization, delivering a breakthrough employee experience in the cloud—no matter how unique your pay rules, labor regulations, schedules, and employee self-service needs are. Enterprise grade and future-ready, WorkForce removes the noise from your manager's busy day, protects your organization against compliance risks, provides leadership with strategic business insights, and delivers real employee engagement at the time and place work happens. Whether your employees are global, unionized, full-time, part-time, mobile, or seasonal, we make managing your workforce easy, less costly, and more rewarding for everyone.

**To learn more about how the WorkForce Suite can help your organization cut labor costs and gain access to actionable metrics, organization-wide, speak to our team today.**

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