

A quick guide
to rota and
workforce
management
software

roubler.

The challenge of effective scheduling



Why effective scheduling is crucial for your business

Effective scheduling is a business essential. Done right, it can streamline operational costs and enhance the employee experience.

Unfortunately, too many businesses are trapped in the nightmare of manual data entry and systems that don't talk to each other, leading to missed shifts, scheduling errors and non-compliance blunders.

Software can solve this through smart, AI powered features – but with so many different solutions on the market, it can be difficult to determine which is the right one for your workplace.

This guide will walk you through the essentials of selecting scheduling and workforce management software. We'll show you which features to look out for, and what you should consider when choosing a vendor to partner with.

With the right solution in place, you'll be able to cure your administrative headaches and create efficient schedules that don't cost the earth. Your team will thank you later!



Challenge 1: Inefficient scheduling practices

There are many factors at play when it comes to creating an efficient rota.

Do you have the right number of staff on shift? Is there an appropriately qualified senior or responsible person scheduled on? How do you know the people you've scheduled are available, and aren't on leave or off sick?

Balancing these factors and more, to ensure employees are safe and able to perform their duties effectively all while managing costs, is incredibly challenging without the help of smart software.



Challenge 2: Manual data entry and messy integrations

The scheduling process is reliant on data from across your workforce management ecosystem, such as employee leave and availability, employee location, working patterns, legislative compliance information, as well as variables specific to your business such as which type of role is required for a particular shift.

Bringing this data together seamlessly can be difficult; many systems still rely on manual entry or exporting and uploading data, which can take time and leave little room for error.



Challenge 3: HMRC compliance

Every year, hundreds of businesses receive fines for not operating their business in compliance with current legislation.

Without the right software, it's all too easy for even experienced teams to make a small mistake that can result in a not-so-small penalty.

Most of the time, businesses don't realise they are in the wrong until it's too late.

Fortunately, auto-scheduling software with built-in compliance can solve this, as we discuss in the next section.

Powerful AI-enabled software

Thankfully, AI-enabled software is helping businesses to solve the headache of inefficient and error-prone scheduling. Here are some of the features to look out for when selecting your solution.

AI auto scheduling

With AI auto scheduling, you can say goodbye to spending hours creating your rota and schedule an entire workforce with just one click.

A smart system should automatically pull all requisite employee and business-specific data, and overlay this with factors such as employee scores.

Be sure to check the process for events like shift swaps or unexpected leave, as with the right system these can be easily amended.

Not only will an AI-powered rota help you avoid risks like understaffing or overpaying by eliminating human error, it also should save you a significant amount of time – allowing you to focus on more strategic projects.

Legislative compliance

Due to complex legislative requirements, many payroll teams are burdened by multiple calculations and a constant review of intricate regulations.

When choosing software to help you manage this, it's important to make sure the rules relevant to your business are covered.

It's also critical to check these are being regularly updated too, otherwise you risk non-compliance.

Additionally, look out for features like built-in compliance when scheduling, automatic calculation of pay and entitlement for each employee, and systems in place to alert you if you try to schedule an employee in such a way that conflicts with current regulations – all of which can reduce risk and save time.

Ultimately, you'll want to assess software on how it will help minimise the risk of non-compliance, and how it will reduce your team's workload when dealing with legislative change.

Calculate labour costs in real time

A badly-planned rota can significantly affect profits. Many managers, keen to avoid understaffing woes or risk of non-compliance, wind up with ballooning labour costs that impacts budgets and the bottom line.

Without the right data, it's impossible to spot inefficiencies or implement process changes to save the business money. One solution to this is real-time business intelligence and workforce analytics, so you can make ongoing data-driven decisions.

When choosing a solution, always ask for detail on the analytics and reporting capabilities, and consider the business improvements that could be realised by better oversight into data such as labour efficiency or the relative cost of different locations and departments.

Effective staff communication

Looking after your employees is good for business

Your employees are the lifeblood of your business: research shows that companies with more effective employee experience are more likely to perform better financially.

As a result, forward-thinking employers are investing in technology, including scheduling and workforce management software, to enhance the employee experience. For shift workers, scheduling can have a huge impact on how they feel about their employer, leading to frustration if it's not done right.

Just keep it simple

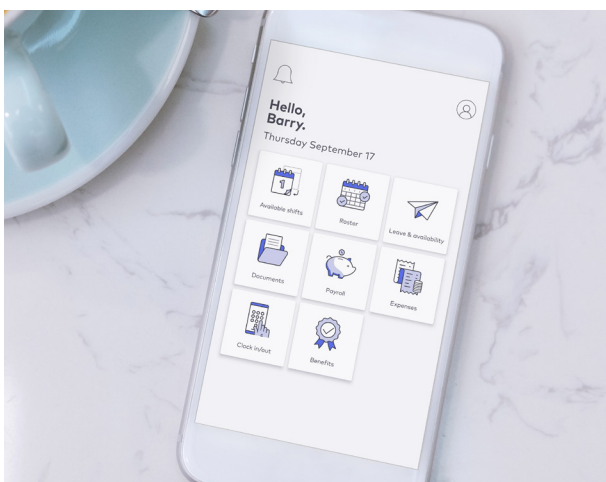
Employees don't want to spend time and energy on checking their rota, swapping shifts or requesting leave.

Just like the other apps they use to manage their lives, they want the process to be seamless, enable them to self-serve and be available at all times from their mobile device. This also extends to other HR related matters like expense claims, employee benefits, clock in and health checks.

Empower your employees

Employees want to feel connected and in the know. There's nothing worse than feeling like your employer has left you in the dark about a new policy or failing to give you the information you need to do your job.

That's where workforce management software can help, giving employees easy access to the right information in one place, and enabling swift communication should things change.



Why a mobile app will empower your employees

We manage our lives on the go more than ever before, which is why any good scheduling software should provide a mobile app or at the very least mobile-optimised software.

This is especially important in sectors like retail, hospitality or manufacturing where people aren't typically sitting at desks.

One seamless system

Make your systems work for you

Working with multiple software platforms can be an ongoing challenge (and the costs can quickly add up too!).

Choosing your scheduling software is a good time for a wider audit: why not look at which of your workforce management systems are no longer serving you, and whether these could be brought under one roof to make things more efficient.

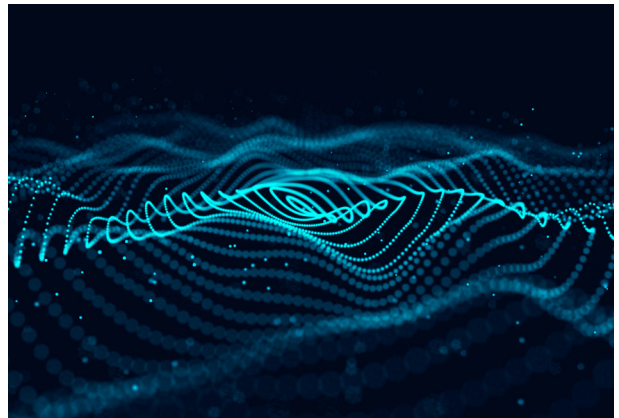
Consider the benefits of an all-in-one

Having an all-in-one system is an attractive proposition, particularly when you're time poor and your resources are overstretched.

An effective solution will eliminate the need for laborious and often manual data transfer between platforms, maintain data security, and automatically sync when details change – for example if a new employee is added.

But be careful! Many systems that claim to have full integrations are actually an administrative nightmare – particularly if they've been bundled together from multiple legacy solutions and weren't designed to work together.

Always check exactly how these systems interact and update, and make sure you get a demo to assess usability.



Why true SaaS is best

In recent years the software as a service (SaaS) model has increasingly become the preferred choice for businesses of all sizes.

Since they don't require on-premise installation, cloud-based SaaS systems like Roubler are quicker and cheaper to setup, and accessible anywhere, including on mobile devices.

Make sure you take into account whether a vendor is truly SaaS based when you're deciding which scheduling and workforce management software is right for you.

Well-aligned partnerships

When choosing scheduling and workforce management software, it's not only the features of the software itself you need to take into account.

Implementing core operational software is to embark on a lasting partnership with the vendor, and you'll want to make sure it's a partnership that's well-aligned.

Industry and size matters

Many vendors will have designed their applications to suit specific industries, so be sure to understand if they address your specific business challenges, or if you're paying for features which aren't relevant.

It's not all about industry either; software designed to meet the needs of small or medium sized businesses may be different to those suited to enterprise customers.

You can get a good sense of a vendor's typical customers and whether these are a fit with your business through their website or speaking to their sales teams (use our checklist on the next page!).

Local knowledge

Opening up your search to vendors abroad will give you more choice and potentially access to cheaper options.

While it's not always necessary for a vendor to be based in the same region as your business, bear in mind that being local can have its advantages, particularly when it comes to compliance.

If a vendor is located outside your region, you'll need to be absolutely sure that they are abreast of the relevant workforce legislation.

Local suppliers will also bill in your currency, which protects you from currency fluctuation and offer support in your language and timezone.

Training processes

In order to maximise the value you realise from your new system, it's important to empower your workforce to use it effectively, and this is where training comes in, be that self-serve or personalised.

Find out what training will be available, both at the onboarding stage, for new employees, and on an ad-hoc basis.

Personalised support

The level and quality of support – good or bad – will define your experience with a vendor.

Check factors like; the hours their support team is available, the channels they cover (web chat, phone, email), and what the expected response time is.

Does this align with the needs of your team? If not, they may not be the right software provider for you.

Questions to take to your demo

Now that you know what to consider when choosing your scheduling and workforce management software, here's a handy list of questions to take to your demo.

- How exactly would I go about scheduling my workforce using this software?
- How long does it take to create a rota?
- Is the system an all-in-one or a standalone?
- Will it be able to automatically pull in/send out the data I need (e.g. payroll, employee self service, learning and development, recruitment etc)?
- What data (if any) would I have to input manually?
- Is it a true SaaS (cloud-based) system?
- How does the system support compliance with relevant workforce legislation?
- What features are offered to make life easier for employees?
- What is the process if employees take time off or want to swap shifts?
- Can employees make these requests via a mobile app?
- Can employees update their details on the go?
- What reporting and analytics will I have access to?
- Is the pricing transparent and easy to understand?
- Are there any hidden costs?
- Will you hold me to a lock-in contract?
- Do you have an outsourced payroll service to make my life easier?
- What support is available (chat, email, phone)?
- What is the support in my timezone? Is someone instantly available or would I have to send an email and wait for a response?
- Do you have additional resources to help me stay on top of my game as a leader?
- How long will it take for my system to get set up?
- Do you offer training?
- What other customers in my sector or of a similar size do you work with?
- How have other customers of yours used this software to make their processes more efficient?



Seamless workforce management

Roubler offers our customers in the UK leading cloud-based workforce management software.

We make managing your workforce simple, through smart, seamless software.

We'll help you to onboard, rota, manage and pay your staff from one cloud-based system, all the while ensuring compliance.

Our clients spend up to 81% less time on scheduling, freeing them up to work more strategically.

Roubler is designed especially for shift-based teams, bringing all data together in an app that employees love.

Say goodbye to messy integrations and multiple platforms, and hello to Roubler.

Sound good? We'd love to hear from you.

**Call us on 1300 833 137
or email info@roubler.com**



Onboard

Automate employee onboarding and go paperless.



Rota

Create efficient schedules with a single click.



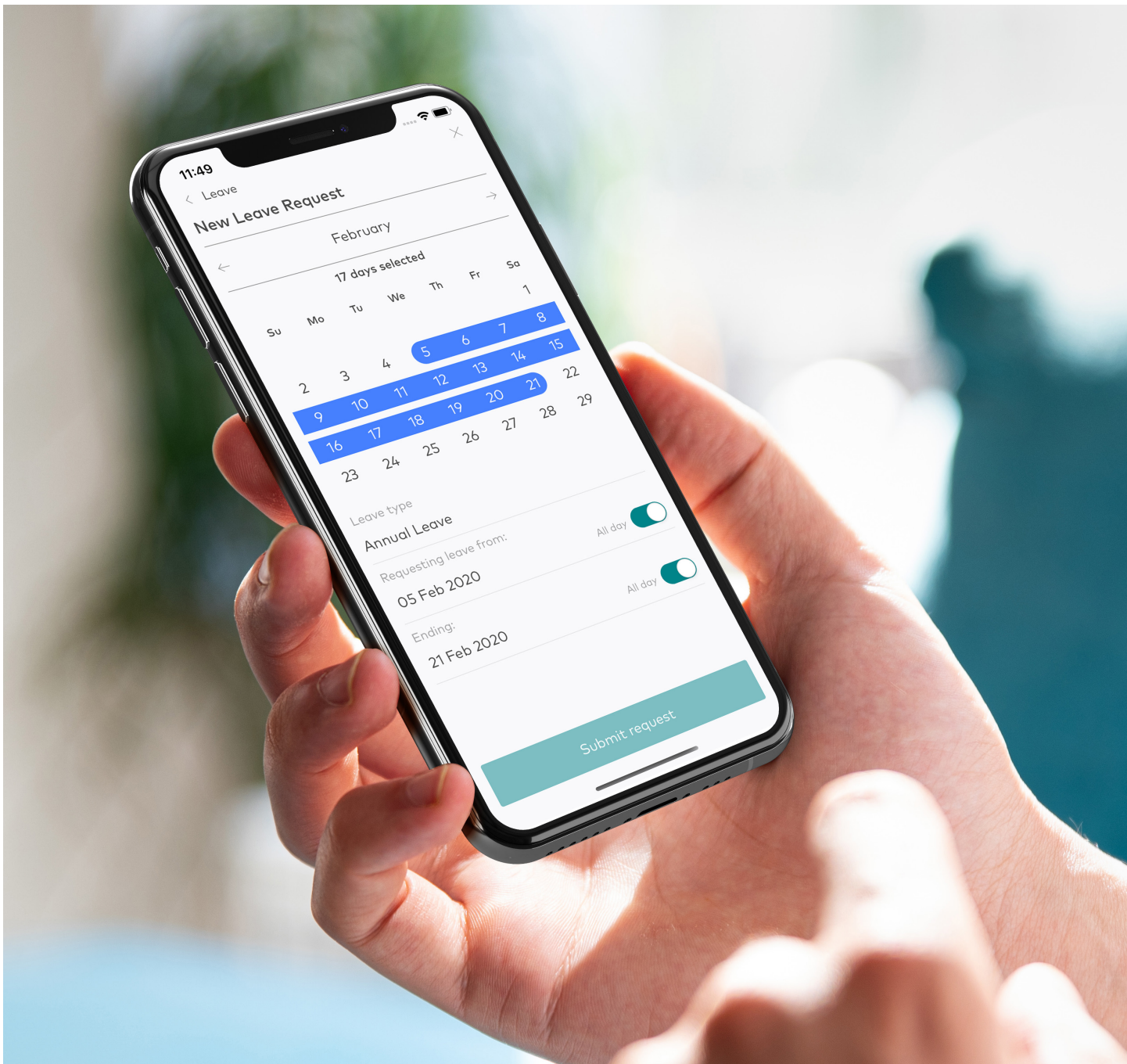
Manage

Manage employees seamlessly at every stage.



Pay

Enjoy peace of mind with built-in legislative compliance.



Find out more

Want to learn more about choosing the right scheduling software for your business?

Call us on +44 20 3514 6747
or email info@roubler.com

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www.roubler.com