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A busy soccer mom walks briskly from her van into the local grocery store on a five-minute mission to buy ham, bologna and bread for lunches the next day.

With two loaves of bread in her arms, she bears down on the deli counter, only to find it is not staffed. Turns out the deli clerk was in the cooler pulling product as the deli manager was doing inventory in the stock room. The soccer mom waits, taps her hand on the counter, then turns and leaves the store.

Unfortunately, this is an all too common scenario experienced by shoppers. However, in this instance the market had already installed a state-of-the-art scheduling system that was designed to predict when customers would come into the store, how much they would buy and how many staff were needed to meet the customers' needs. What went wrong?

In this instance, the scheduling system did its job by correctly forecasting the **flow of business** and positioning available employees to meet the customers' needs. The key point is that a scheduling system is merely a **management tool**

. You can't turn the system on, walk away, and expect it to run the store.

This is a common problem in many workforce management (WFM) implementations. The need and benefit of a scheduling application is widely recognized and accepted. The related work to get the system installed is completed, tasks are identified, and standards developed. The system is then tested in a few stores, blessed, and eventually rolled out — problem solved.

Not quite, in most instances the challenge begins with the rollout of the newly installed WFM system. While the application provides staffing guidelines based on the store's customer information, it doesn't manage people and it doesn't make on-the-fly staffing decisions. In this particular example, a manager needed to oversee the system, as the staff was busy with everyday tasks at a time when customer service was needed.

Successful workforce scheduling programs include three critical components:

- The program must meet customer service requirements.
- It must be effectively communicated to employees.
- It must be actively managed.

Many scheduling programs use labor standards along with shopping patterns to produce an exemplary service level. The workload allotted should produce the time to perform all tasks that are directly related to customer care. This staffing level is based on the flow of items and customers through a particular department and it is a working model of the store under ideal conditions.

In most scheduling systems labor standards can be triggered by an event, so employees are typically scheduled around the ebb and flow of each particular day. For example, inventory work can be scheduled to take place before opening or after close, while a full staff is made available during peak selling hours to assure the highest level of customer service.

It is also essential that managers understand how a WFM system works. Training sessions should include a detailed overview on labor standards, a breakdown of how the workload is

created, and the technical components of the scheduling system. Without understanding these key concepts, the manager will not be able to effectively use an advanced scheduling system.

If we look at the problems experienced by our soccer mom, we can see that the use of the scheduling system was not fully understood by the deli clerk and more importantly, the manager. According to the system, inventory and stocking tasks should have occurred before the store was open to eliminate a frustrated customer and lost revenue at the counter to walk away.

Bottom line, workforce scheduling programs are powerful tools that can help businesses make the most of their employees' time, ultimately leading to greater customer satisfaction. But like any resource, it must be used properly to reach its full potential.

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