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## Make scheduling easier with the right shift management software

Microsoft 365 Team  
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As organizations continue to grow, so do their staffing and scheduling needs, especially if they use shift-work employees throughout all times of day or night.

These kinds of employees are more commonly known as “shift workers” or “frontline workers,” and the challenges to scheduling their shifts continue to mount with each passing year. That’s why many organizations are ditching the use of outdated spreadsheets in favor of more versatile staffing solutions with some of the most up-to-date employee scheduling software on the market.

Shift scheduling software not only saves time in scheduling but also provides an overview for things like scheduling conflicts, employee PTO, holidays, and actual hours worked versus hours scheduled.

The benefits of utilizing the right shift management software for your frontline workers can pay off in many ways.

Learn more about how modern technology like shift management software can help [unlock potential for frontline shift workers](#) in this report.

### What is shift management software?

Shift management software at its core is simply a scheduling tool. But the right shift management software can do so much more than simply make a shift schedule for your front line every week—it can give you a complete overview of all your staffing needs.

With a dependable employee scheduling software, you can access an overview of crucial information to help keep your business running smoothly all year long, such as employee time-off requests, PTO, holidays, overtime, and scheduling discrepancies.

### The challenges of shift management for your front line

As any manager can tell you, scheduling shifts for your frontline workers is no easy task. Many organizations rely on a manual process using the same old spreadsheet template year after year. But this analog process is not only time consuming, it’s also inflexible when changes arise, and this could lead to scheduling errors and

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understaffed shifts.

Many of the challenges to shift scheduling can include a balance of factors like:

- Frontline workers calling out sick
- Time-off requests
- Paid time off (PTO)
- Scheduled breaks
- Holidays and special business hours
- Overtime
- Legal work hour limitations
- Shift swapping and shuffling

When these issues result in understaffed shifts, this can cause an unnecessary strain on the rest of your staff and create a stronger likelihood of your customers receiving poor customer service.

To learn how to make better schedules, check out our [5 tips for making frontline workforce scheduling easy](#).

### Consequences of poor shift management

When any one of these factors arise, it can create a disruption that can set the streamlined operations of your business off balance. These disruptive issues often have unexpected consequences that include:

- Understaffed shifts
- Burnout frontline workers
- Low morale and failing comradery
- Unhappy and bickering shift workers
- Lack of accountability
- Unfulfilled orders or service promises
- Poor customer service and poor customer experiences
- Poor customer reviews of your business and its frontline workforce

Reliable shift management software will not only foresee these disruptions in advance, but it will also proactively plan ahead to avoid these pitfalls altogether.



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### Limitations of shift software programs

When shopping for new software for your frontline workforce, keep in mind that not all shift management software programs are created equal. In other words, think scheduling tools versus a fully robust shift management program.

The former provides just a means to schedule a frontline workforce, while the latter provides a full overview of every moving part of your business' operations in real time. In addition, many of these staffing solution programs do not include the ability to forecast demand and cannot prevent the operational disruptions mentioned earlier.

Some of these inferior shift management tools often run into the following operational issues:

- **Inflexibility with exceptions**
  - When frontline workers need to swap or trade shifts suddenly, many programs do not offer real-time solutions to fill the gaps, leaving your scheduling manager to solve this issue manually. This takes valuable time away from your manager to address more important issues and creates a higher likelihood for human error to occur in scheduling.

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increased risk of human error to occur in scheduling.

- **Inability to flag important dates**

- When a scheduling software fails to notify your scheduling manager of important dates and times, such as holidays or a specific frontline worker's PTO, this can cause a major disruption in your business' operational efficiency.

- **Inability to forecast demand**

- Scheduling the right number of frontline workers for the demand of each shift throughout the day is paramount to keeping your business operations running smoothly without risking a poor customer experience and burning out your workforce.
- Overscheduling frontline workers can also throw off the balance of the work week, leaving other shifts understaffed and costing your business more money than necessary when it's time to pay your workforce, such as in overtime pay.

- **Poor staff visibility**

- Many programs are unaware of their frontline workers' whereabouts in the field—how long they are working, where they are located, and what customers they are serving that day. These gaps in knowledge can create problems when certain workers need to be located or contacted in the field ASAP.

- **Inability to match shifts by skillset**

- Many shifts require frontline workers with different skillsets, such as a supervisor and a handful of shift workers. Other organizations might need specific skilled workers at a job site at the same time like a plumber and a contractor.
- Furthermore, some organizations may need frontline workers with specific certifications available at certain times like an in-home nurse or a school tutor.

With the right shift management program, you will avoid most of these operational inefficiencies and your scheduling manager time from resolving these issues on their own.

#### **Advantages of shift scheduling software for frontline workers**

With powerful shift management software, many of these challenging factors can be forecasted and managed in real time.

For example, if a frontline worker calls out sick, a viable solution for coverage can be found quickly and efficiently with the help of scheduling automation. If two frontline workers need to trade shifts, their shifts can also be adjusted automatically to balance the allotted hours needed for both workers.

The same is true for scheduling shifts in advance. If a worker is accidentally scheduled for a shift on their approved PTO, a reliable shift management software can flag this as a future scheduling conflict long before it becomes an issue.

And these are only some of the advantages.

#### **What are the main benefits of using robust shift management software?**

When you utilize a powerful shift management program for your front line, some of the top benefits may include the following:

- **Save money on labor costs by keeping track of:**

- Actual hours worked versus hours scheduled
- Sick days
- Vacation days
- Requested time off
- Paid time off (PTO)
- Worker breaks
- Overtime
- Forecasted shift demand

- **Save time by:**

- Creating and organizing schedules from scratch.
- Swapping and shuffling shifts with automated scheduling tools, including allowing your frontline workers to swap shifts themselves.

workers to swap shifts themselves.

- Planning schedules days, weeks, months, or years ahead with a full overview of all business operations.
- Matching frontline workers with the right skillsets and certifications at the right times and places.
- **Keep your team all on the same page.**
  - With mobile access to shift management software, managers can adjust shifts on the go while your frontline workforce can look up their schedules from anywhere.
  - Accurate tracking of all frontline workers – their locations, hours, skillsets, certifications, and clients they are serving that day.

#### What features should I look for in shift management software?

When shopping for [shift management software](#), it's good to keep in mind some of the top features that make a shift management software so much more than just a simple scheduling tool.

Some of the top features for a shift management solution include:

- **Seamless scheduling**
  - Reliable shift management software should easily organize shift schedules from scratch or allow you to import existing schedules from Excel.
- **Visual calendars**
  - Visual calendars give your managers an overview of your entire week, month, or year ahead to help them forecast demand.
- **Automated shift shuffling and swapping**
  - Save time by allowing your frontline workforce to shuffle or swap shifts without creating new scheduling conflicts like understaffed or overstaffed shifts.
- **Built-in time off requests, PTO, and holidays**
  - Keep track of time-off requests, sick time, PTO, and holidays automatically to keep your business operations running smoothly and your frontline workers happy.
- **Accurate time tracking and attendance**
  - Knowing the actual hours worked versus hours scheduled for every frontline worker keeps your record-keeping and payouts accurate.
- **Mobile capabilities**
  - Allowing your managers and workers to look up and manage their schedules from anywhere keeps your team on the same page in real time.
- **Skillset and certification logging**
  - Automatically keep track of each workers' skillsets, certifications, and training and be notified when their certifications are about to expire.
- **Partner syncing**
  - Good shift management solutions also allow you to synchronize with other work management systems your business partners use.

Learn more by reading how [Technology Can Help Unlock a New Future for Frontline Workers](#) or by exploring the many ways [Microsoft Shifts](#) can improve all of your scheduling needs.

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#### About the author





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