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Deciding how to plan employees requires you to be in tune with the way your company operates, such as knowing its busiest days and months and product sales trends. Having information about your employees' needs is also important. The best programmes are flexible, do not work or work too hard, maximise profits and are published well in advance. If you have fewer than 75 employees and need easy-to-use employee scheduling software that's free, consider When I Work. You can manage the entire online schedule using your mobile device. If you have a show without a last-minute presentation, you can offer the shift to available employees in seconds using the Shift Replacement feature, and When Work assigns it to the first person responding. Visit When I Work Good Employee Planning is clear (employees know when they'll start and stop working) To start planning, you can follow a few simple steps. Definitely start with your employees, since they are one of the biggest assets in your company. Learn about their availability, skill, and how they will best contribute to each turn. Then assess your business needs and see how you can bring the two together. If you use employee scheduling software, the process will take less time. 1. Make a detailed list of employees Start by drawing up a detailed list that includes all your current employees. This will serve as a reference sheet when you start assigning working hours. Enter as much information as possible that can help you create the best schedule. Data such as employee names, job titles, and shift preferences (night vs day) are good examples. Employee name When entering each employee's name, be sure to include at least the first and last name. Look for duplicates. Employees with a common first and last name are more likely to one day have at least one colleague who shares their name. In cases like these, you'll need to use a delivery man like a middle name or initial. You may also be able to use one worker's nickname and a full name for the other (Michael vs Mike), if they approve. Inadvertently scheduling an employee for a double shift due to confusion over their names could lead to conflict and costly overtime pay (along with higher taxes). Professional title employee or professional role You must also document any official qualifications or professional roles that reflect the scope of employees' work. After that, when you start creating the schedule, you'll need an easy way to match the to the work necessary for the staff. Depending on your company, some workers may have multiple job titles. For example, many restaurant employees work both as servers and hosts, only on different days. Including this information in your employee list ensures you always know how to maximize your employees' working time throughout the week. Unique situations There are some unique circumstances that may require you to document information about employees. For example, if you measure productivity based on customer appointments versus consecutive hours at work, or if your company is in an industry with an unpredictable work schedule, you'll need to take that into account when preparing to schedule employees. At the call work Let's face it. Some companies cannot function at all if they have fewer staff. A home health company is one of them. You can't delete a disabled elderly customer who needs their caretaker to sit with them throughout the day. If your company is in an industry like this, some of the employees you hire should be available for call work. Keep good records of who you can plan for call work and who you can't. Schedule employees based on customer appointments If your company works on customer appointments, think about salons and other personal service companies, this will determine how you schedule employees. Unless you're open to walk-in customers, you really only need hourly employees at work when there's work, otherwise you'll spend more money than you're bringing in. To help you, look for a good appointment setup system so you can give your employees as much notice as possible about their schedule. Additional information that you can include in the employee list is the days that each worker is generally available. If a customer sets up a sporadic appointment, this will save you time because you'll already have a list of employees that you can contact who are usually available to work on that particular day. Employee planning for unpredictable shiftwork If you run a company with unpredictable shift work, which means you don't know when someone will be needed for a shift until just before you need to stamp it, you need to be more diligent than other employers. It's best if you know that every shift everyone is willing to work at the beginning so you don't waste time calling and asking the wrong employees to come to work during the heat of the moment. Employee schedules for teams If employees primarily work on teams, you may need to coordinate schedules more closely so that projects can be completed efficiently. There may be days when it is necessary for all members of a particular team to work the same shift. Managing an electronic list of team tasks (such as when work allows it) will help you simplify the team planning process and ensure you consider the work that needs to be done It is also good to consider business needs when require paid leave (PTO). Depending on the type of activity you have, approving the PTO in the same week for an entire team could be disastrous. Make sure you always know which team each employee belongs to. Planning templates Simplify employee scheduling All the information we recommend that you include in your employee list can typically be organized more efficiently and quickly if you use an Excel planning template. All required columns are already configured, including one for the employee name, job role, and shift start and end times. All you need to do is enter specific information for your employees and your company. If you have unique planning needs, it's also easy to add new columns or remove those that don't make sense to your business. 2. Using a calendar schedule is a task that requires you to look forward. This is easier if you use a calendar. Feel free to annotate notes on certain days or weeks to remind you of important considerations such as upcoming employee vacations and high-sales volume weeks when you're ready to fill out a schedule for that period. You can also identify pay periods and dates in your Employee Availability calendar Although you should request and document the general availability of your employees at the time of rental, you should also encourage them to notify any deviations from that as soon as possible (at least a couple of weeks in time, if possible). Let's say an employee schedules a doctor's appointment tuesday of the following week. Ideally, they would let you know immediately after scheduling, so you can notice this in your calendar and avoid scheduling them to work that day. Business planning needs Of course, to create successful employee planning, you also need to consider your company's needs. Are some days busiest than others? Are there weeks that always seem to be slower than others (like around the holidays)? Are there any products or services that sell the most that require you to plan more workers in a particular location? You may feel like you can use your instincts to assess what trends to consider during planning, but we recommend referring to some sort of data if possible. It's more objective and precise. Review your company's sales reports, year after year, if you have them. If you notice big jumps in business during certain months or weeks over multiple years, you can more securely increase the number of employees you schedule for that time period. If you have a different service business and employed for different services, such as beauticians, nail tech, and beauticians, having data on service sales trends would be helpful. For example, if historically, customers don't set up many hair appointments during July, but nail services increase, you should be able to plan accordingly if you're aware of them. 3. Play the corresponding game Once you have finished organizing and reviewing the you need to plan your employees for the next period, you can start assigning shifts. Be sure to create a good mix of workers based on their skill level and performance. For example, don't plan all your newest employees at the same time. Make sure you sprinkle some vets so your newbies get a chance to work collaborators from whom they can learn the ropes. Software like 7Shifts gives you the ability to see only employees eligible to work shifts and positions for which you need to plan Decide who gets the shift You should know what are the typical needs of your company's staff on an average day. Ten waiters, four cooks, five hosts? Use this as a forecast each time you create a dependent schedule; on the highest sales volume days, increase the number and vice versa on slower days. You should always start the planning process knowing which and how many positions you need to occupy each day. Then switch to the availability of each person. You can easily start popularizing a schedule based on the details you have in your employee list and calendar. Another aspect to keep in mind is the proven level of performance of each employee. You will inevitably have some workers who are more productive than others. It's a good idea to plan at least one high performer (more, depending on the size of your business) on each turn. Unique considerations that affect planning There are other factors that you may need to consider when planning such as the legality of hiring minors and the certifications required for certain types of work. Time can also play a role, especially if you conduct your business outside (e.g. with an automatic detail task). Minors in the workplace If you use minors, you'll need to know the ins and outs of federal regulations that govern when they're allowed to work. State laws come into play too, so it's a good idea to visit your state's website for details. Federal law allows children under the age of 14 (not under the age of 13) to work; however, if you are 14 and 15 years old on staff, you must comply with the following limitations: Three hours on an 18-hour school day in a school week Eight hours on a non-school day 40 hours in a non-school week between 7:00 am and 7:00 pm.m, except from June 1 to Labor Day, when night.m work time is extended to 9:00 pm.m. You'll need to follow any state and federal labor laws closely if you need to plan minors. Child labour laws are serious business and you can put them on penalties and in prison if you break them. Certifications required Some jobs require more than skills, but official certifications. For example, if you promise your customers that they will be served by authorized cosmetologists or certified public accountants (CPA), this is what you need to deliver. Keep this in mind if planning certain services that require your employees to be certified. You should be able refer to your employee list to easily find those who qualify for the job you need to schedule. If you use scheduling software such as When I Work, you can easily schedule each employee's certification in the software and attach the appropriate certification requirements for each location; the system system with employees who are entitled to work that particular shift. Weather If the weather somehow affects your business, you should consider it during planning. You can see a forecast for next week with a quick Google search. Also, simply being aware of the weather trends in your location can make a world of difference. For example, Florida's rainy season runs from mid-May to mid-October; food truck and mobile car detailing companies in this area would ideally keep it in mind, so they are always prepared for fewer customers during that time period (unless they ingreete alternative agreements to protect their business from external elements). 4. Get employee feedback Once you've finished the first draft of your program, it's critical to get employee feedback if you want to make them happy over time. This is because situations like a sick child, a forgotten doctor's appointment, or an upcoming family event that an employee may have forgotten to talk to you about come out of. Meeting the needs of the worker improves job satisfaction and reduces the possibility of non-shows. When sharing your schedule and getting feedback When you're comfortable with planning and have it rechecked for any discrepancies, you should share it with your employees. If you're not using software, an Excel template will work and is easy to deploy via a group message. You can also include a feedback column so they have a foolproof way to let them know if they see any issues with the days or working hours assigned to them. It's a good idea to assign a deadline of when you need their feedback, if necessary. Plan an official go-live day for each program you create. Perhaps you could submit the program two weeks in advance on Friday and request that all feedback be by Tuesday at the latest. This would give everyone a weekend to review (along with an more day). By incorporating employee feedback into your schedule Once you've received employee feedback, you'll need to review it to see if you need to make changes. If an employee wants to take off for a party, but your common position policy states that they must submit an official request at least three weeks in advance, you have the right to ignore it. However, we recommend that you communicate this directly with that employee so that there is no confusion later when the final program is published. When you need to change staff training, use the detailed list of employees to understand which workers have the most available on the date and time in question for which a replacement is required. You can also allow your employees to find their replacements in advance; they can include that detail with their feedback, so all you have to do is update the program. If you choose to use software like When I Work, this process can usually be automated. Employees can refuse a working day suggest a replacement to approve. 5. Finalize and publish the schedule After you have incorporated and/or responded to all planning change requests, you can finalize and publish the schedule. If your draft is in Excel, we recommend that you publish it to PDF and send it to your team. They won't be able to edit it and will prevent anyone from confusing the final version with the draft. If feasible, it's also a good idea to publish the program somewhere in the workplace as if you had a small coffee shop. If your team is more tech-savvy and/or distributed, Google Drive might work better. Check your schedule often and update employee names when there are Daily Monitor shift exchanges You may think that once your schedule is published, there will be no other changes. In a perfect world that would be the case, but realistically you will have to monitor it every day so that you can make all the necessary revisions immediately. Employees get sick, car problems occur, and the list goes on. Your schedule should be as realistic as possible and always reflect your current staffing plan, otherwise employees may get confused and not show up for work when they should. More employee planning considerations Learning to plan employees so that it works best for your business is essential. There are numerous labor laws to consider, but not all of them will apply to your business. The federal overtime rule, all hours worked over 40 in a seven-day period must be paid at the moment and the half rate, is a big one to consider; to keep costs low, schedule employees hours for up to 40 hours each week. You'll also need to keep copies of all employee planning records for at least two years. Planning employees with software Although you can manually create and manage employee work schedules, it's not the most efficient way to manage it. There are plenty of free or low-cost employee scheduling software that you can use, and most have special features that help you avoid overtime costs, quickly find shift replacements, make changes from anywhere using a mobile device, and so on. We mentioned When I Work, but you should also consider Homepage, especially if you have a physical location because it will be free. If you're in an industry with tight profit margins, try Humanity, because it has tools to help you manage labor costs. If you have multiple locations and sites, however, Deputy would be a better option because of its structure planning features. And for the larger, 7Shifts is ideal. Deputy allows you to switch between planning, location data, reports, and other Bottom Line views The quality of employee schedules can create or stop your business. Understand how to plan employees to maximize profits (avoiding overtime, overwriting, and losing tasks due to staff shortages) and keeping employees dependent is a balancing act. It requires creating solid processes on the front end, collecting the most appropriate data to help you make the best planning decisions, and regularly evaluating the schedules you create. If you're tired of using pen and paper to schedule employees, and you don't want to manage Excel spreadsheets but still want a free option, consider using When I Work. It's free for employers with fewer than 75 employees, and you can manage it on your mobile device. Employees can also access the schedule and request changes or suggest replacements from anywhere. Visit when I work

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