![Shyft™ Workforce]

Employer's Guide to Mobile WFM

Understanding Mobile's Role in Your WFM Strategy

Table of Contents

Helpful Definitions

## Workforce Management (WFM) Systems

Technology platforms designed to provide scheduling, absence management and other labor management tasks for companies.

Mobile-First Technology

Software that is optimized for use on mobile devices but can be used on other types of devices as well.

Mobile or Mobile-First WFM

Technology designed for use on mobile devices that provides hourly employees with new capabilities to evolve companies' workforce management strategies.
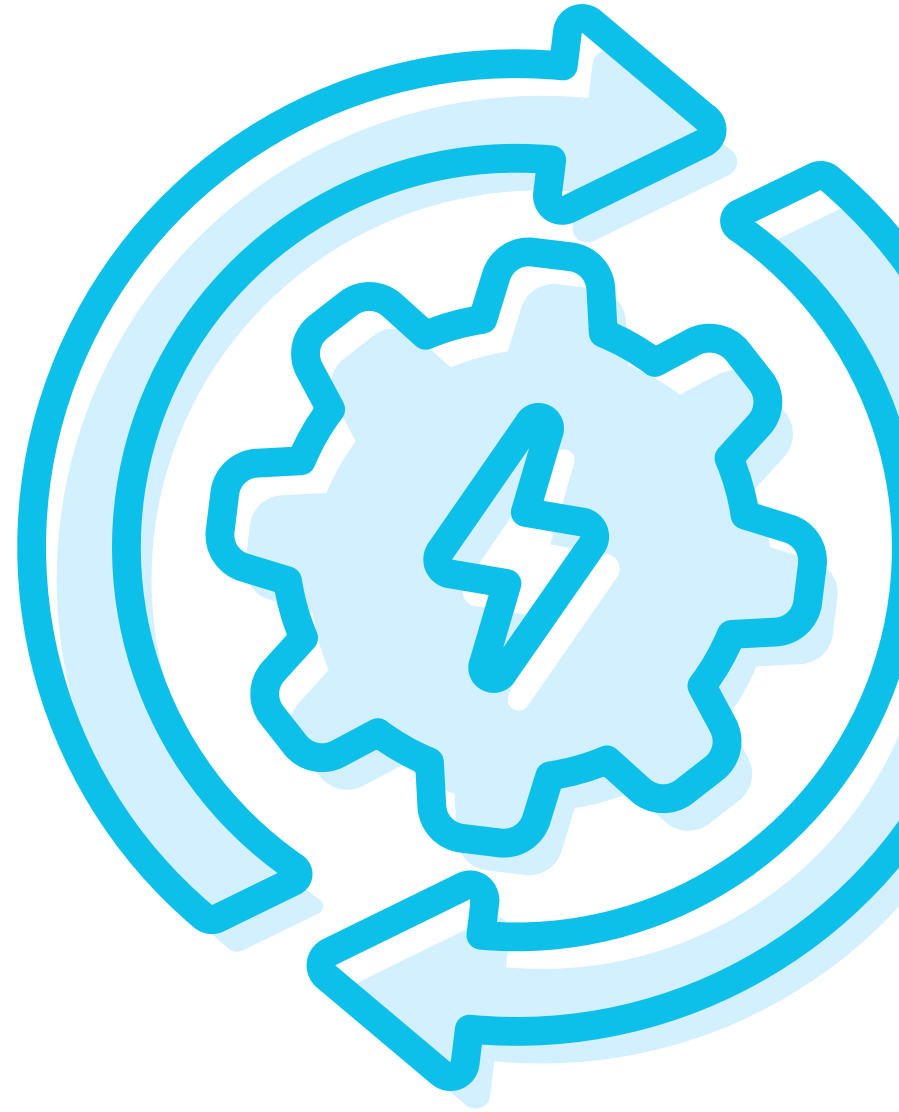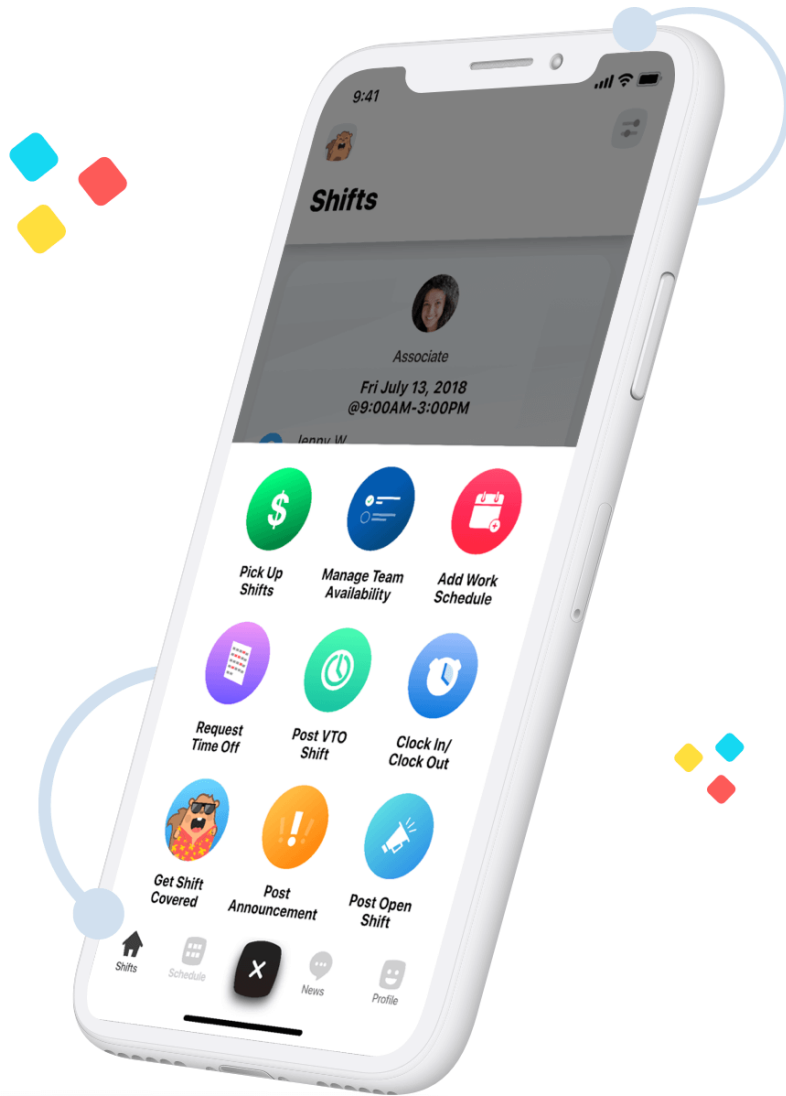
Introduction

Since the release of the iPhone in 2007, smartphone adoption has saturated **70% of the U.S. population.**[1] Mobile technology is a pervasive part of both customers' and employees' daily lives, making it a priority for companies. To keep up with new standards of convenience and efficiency, many organizations are evaluating mobile solutions as part of their overall digital transformation initiative.

This is especially true in the realm of hourly workforce management. Considering **98% of Generation Z owns smartphones**[2], companies will want to make mobile a meaningful part of employee experience as this generation enters the workforce.

Traditionally, hourly workers have not been provided with tools to manage their work priorities, let alone the latest mobile solutions. This has left employees to use unsanctioned, inefficient methods for trading shifts, communicating as a team, and staying up to date on company information. As we'll discuss in this guide, this not only puts company data at risk but also hurts employee morale and productivity.

1. https://www.mobilemarketer.com/news/emarketer-us-smartphone-usage-will-grow-3-to-2328m-people-this-year/550564/
2. https://blog.globalwebindex.com/chart-of-the-day/98-percent-of-gen-z-own-a-smartphone/

This led to the introduction of companies, like Shyft, that have sought to develop solutions for frontline workers. The rise of mobile-first technology, which is optimized for use on mobile but available on a variety of devices, has expanded possibilities for employees and companies alike. Many employers are evaluating, piloting, and deploying mobile-first solutions as a benefit for their employees.

Companies now have a better way of bridging employees' scheduling activities with their existing workforce management system. Mobile-first solutions are only the latest addition to the robust ecosystem of workforce management technology available to companies. Many mobile vendors integrate with well-known providers in the industry to sync frontline schedule changes with backend systems.

Because mobile-first WFM is a vital, yet unfamiliar, concept, we've pulled together a guide to help employers get up to speed. With new technology comes new challenges, and we make it a priority to educate our industry partners to help ensure their business decisions are well-informed. In this guide, you'll find answers to questions you may have, as well as some you may not have considered.

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Spotlight on the Frontline

If you're reading this in an office in a corporate headquarters, you may be just a bit removed from the day-to-day of frontline workers. As you may be aware, many frontline teams still rely on outdated processes to complete routine tasks.

Schedules are often posted as printed spreadsheets, making it difficult for associates to check when they're working between shifts. If a schedule conflict comes up, employees must turn to social media groups and group texts to find someone who can cover for them. Once an associate finds someone to cover, they then need to call or text their manager for approval.

If a substitute can't be found, the manager is likely responsible for finding coverage, or the shift may go unfilled. This is especially true when a manager finds out last-minute that an employee can't work. The process is inefficient, and shifts often go unfilled as a result. The **negative hit to sales floor**[1] coverage impacts teams' ability to support customers and close sales.

1. https://www.myshyft.com/blog/set-it-forget-it-scheduling-hurts-employee-retention/

Employer's Guide to Mobile WFM

Key Points

- **Scheduling conflicts and inefficient processes cause missed shifts**

- **Employees resort to unsanctioned methods to get shifts covered**

- **Managers spend significant time finding someone to fill a shift**

- **Missed shifts hurt morale, customer experience, and sales**

- **Mobile-first solutions streamline shift swapping and communication to address these challenges**
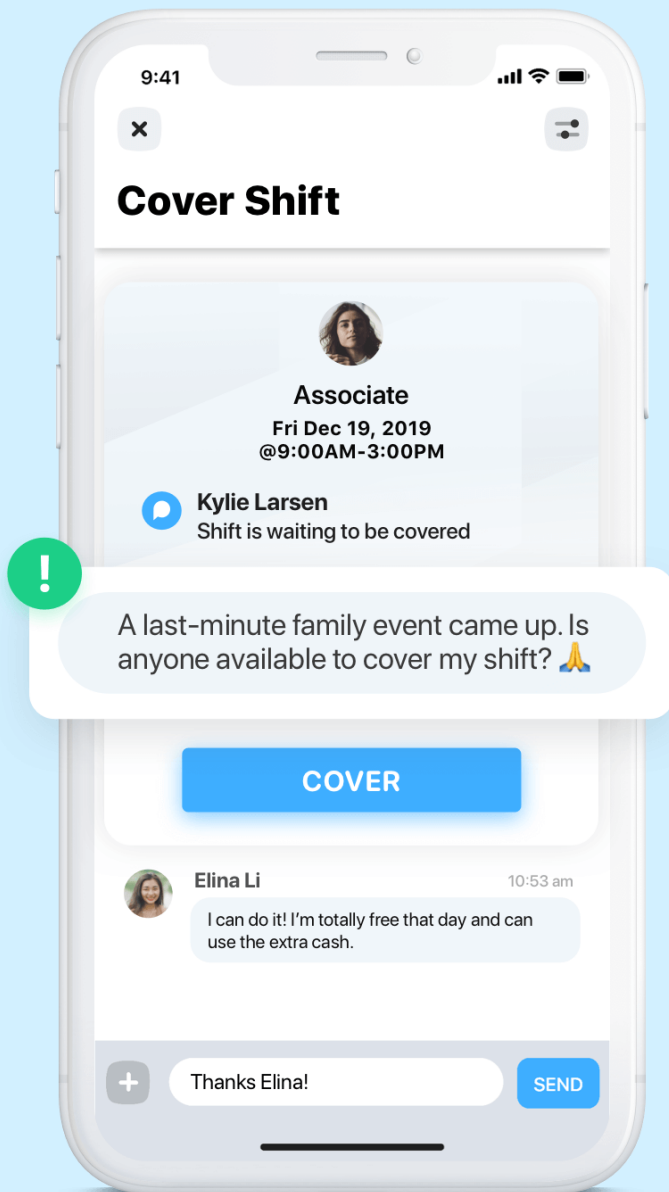
Mobile-first WFM addresses this issue by providing employees with a way to easily check their schedule, get shifts covered, and communicate with their team. Rather than spend hours coordinating over text message, team members can easily post a shift for trade in a mobile app. Others can quickly review the details and offer to cover with the tap of a button. Many solutions also automate the manager approval process to decrease the time and headaches, and ensure a successful trade.

Managers are also able to leverage a mobile solution to distribute important information such as store updates, team announcements, or new policies. A mobile app provides an organized, central hub for employees to stay up to date and connected with their team and employer.

At Shyft, we've heard that our users often make a habit of checking the Shyft Mobile App daily. Associates can browse shifts that are available to cover in the Shift Feed and pick up extra hours. They may also comment on a coworkers' post or share their own kudos for someone who went the extra mile.

By providing employees with not only a tool, but the latest in mobile-first technology, companies are able to drive efficiency and improve morale on the frontline.

Business Benefits of Mobile-First WFM

While shift swapping and communication are prominent use cases, the applications for mobile WFM are far-reaching. Companies will want to evaluate possible mobile WFM solutions as part of their comprehensive WFM strategy. Mobile WFM supports initiatives across the organization, from operations and human resources to security and legal.

Operations

If employees are able to check their schedule easily and effectively trade shifts, last-minute call-outs decrease, and attendance improves. In our work with a global retailer, we've seen that Shyft reduces absenteeism by 61%. By leveraging mobile solutions, companies are able to increase efficiency for workers. This translates to increased productivity, improved job attitudes, and better customer service. Managers have reported saving up to four hours per week when using Shyft, and associates report saving several hours per week as well.

Key Points

- **Mobile solutions support the goals of each department in an organization**

- **Operations can improve attendance and support customer service**

- **Human Resources can improve employee engagement, morale, and retention**

- **IT can increase security for company data and employee information**

- **Legal can comply with scheduling and personal device legislation**

When shifts are fully staffed and employees feel productive, customers experience better service and are more likely to make purchases.

Human Resources

The companies that we work with report that they tout Shyft as a competitive benefit for recruiting. Because mobile technology hasn't been widely adopted by companies yet, companies are still able to set themselves apart by offering a mobile solution. This is especially useful when attracting younger workers, but employees in all generations appreciate having a tool that supports work-life balance.

Once great talent gets in the door, it's important to keep them. A mobile solution also helps increase retention by helping companies and managers engage frontline employees. We've seen managers **use Shyft to post kudos**[1] for team members that go above and beyond, celebrate anniversaries, and announce job promotions.
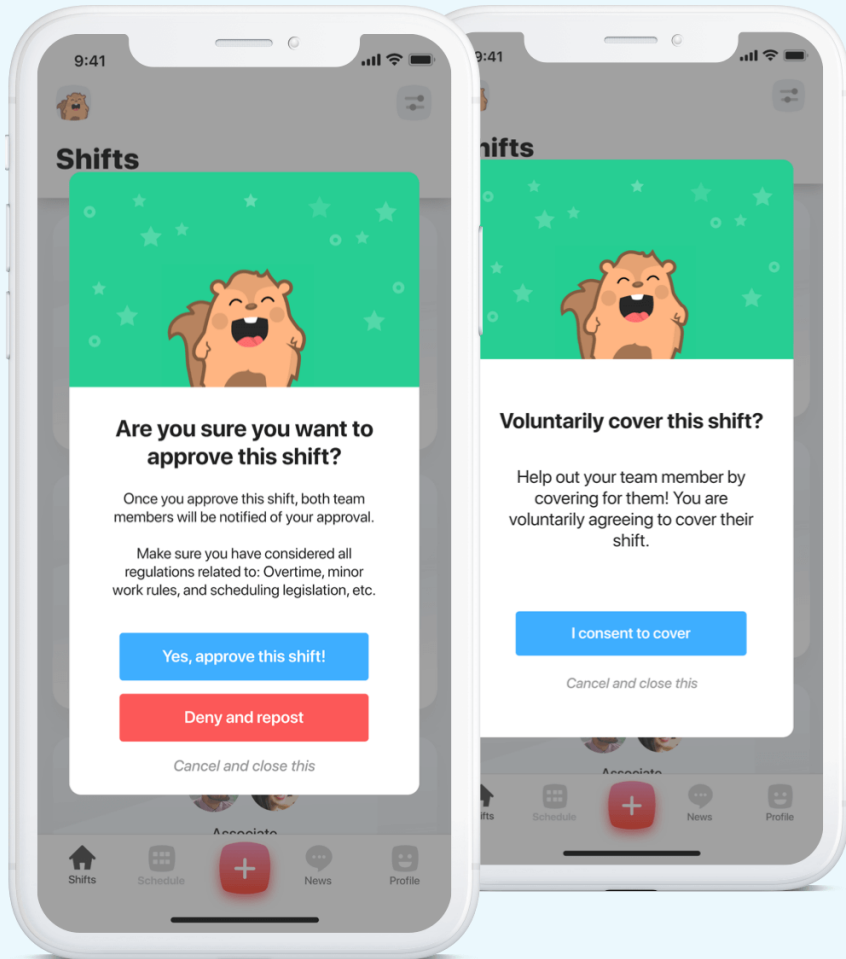
In a survey of users, 75% of associates said they believe Shyft improves morale. **And according to research by Bersin by Deloitte**[2], companies that score highly for a "recognition-rich culture" have 31% lower turnover rates.

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Security & Data Visibility

Mobile-first WFM has the added benefit of increasing security for company data and employee information. As mentioned previously, hourly workers use unsanctioned methods to communicate, they put company data and information at risk. By deploying a mobile WFM solution, companies are able to centralize team communications via a secure app that can be configured according to their security standards.

1. https://www.myshyft.com/blog/5-ways-improve-employee-engagement
2. https://www.inc.com/ryan-jenkins/how-to-elevate-millennial-performance-using-recognition.html

Additionally, when employees are using a company-provided tool, it unlocks advanced levels of data for companies. From analyzing patterns in shift swapping, to monitoring team communications, leadership has more insight into frontline activity. The data can also be used to inform strategic decision making and, as we'll review in the next section, backend workforce management systems' forecasting and planning.

Legal

Challenges around scheduling and shift swapping are also top of mind for most companies' legal teams. It is widely known that **Predictable Scheduling legislation**[1] has started to expand across U.S. cities and states, and it has ramifications for employers. The new policies differ from region to region, but they commonly require advanced notice of schedules, voluntary acceptance of schedule changes, and recordkeeping of schedule changes.

Mobile WFM solutions support companies' efforts to comply with these laws. They facilitate timely distribution of schedules, and employee-to-employee shift swaps qualify as voluntary changes under most ordinances. Then, mobile solutions often maintain records of all schedules, schedule changes, and employees' voluntary acceptance of changes; that data can be exported as needed should a company be audited.

1. https://www.myshyft.com/blog/what-to-know-predictive-scheduling-fair-workweek-laws

Mobile's Role in the WFM Ecosystem

In the [2019 Market Guide for Workforce Management Applications](1), Gartner recognizes emerging mobile solutions providers as "function specialists." Function specialists are described as providing capabilities that supplement the core functions covered by standard WFM systems: time and attendance; absence management; scheduling; and task management.

According to Gartner, these "next-generation WFM applications have the potential to transform, augment, and disrupt the market by introducing new capabilities to WFM applications."

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– Gartner

Key Points

- **Analysts recognize mobile-first WFM solutions' ability to supplement existing workforce management functions**

- **Available mobile WFM solutions offer a wide range of added capabilities**

- **Many mobile WFM solutions integrate with established workforce management providers**

- **Mobile solutions enable companies to leverage frontline data in their back-end WFM systems**

1. https://www.gartner.com/en/documents/3956468/market-guide-for-workforce-management-applications

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Operations	Scheduling	Engagement	Strategy
Task Management	Shift Swapping	Communication	Analytics
Time Clocks	Schedule Distribution	Rewards	Data Reporting
Point of Sale	Real-Time Shift & Voluntary Time Off Distribution	Surveys & Polls	Legal & Security Configuration
	Availability Management		

In the table above, we've captured some of the common specialties offered by mobile-first WFM providers.

A mobile-first solution acts as the interactive front-end to bridge employees' experience with the company's backend systems and data. Schedules can be distributed to associates' mobile devices. Then, if they need to trade shifts, that action would also be reflected in the original schedule. Depending on your configuration, more functionality may be available, such as eligibility checks, regional labor sharing, and employee availability updates.

An existing workforce management system isn't required to utilize mobile-first technology for your workforce. If, however, your company does work with a workforce management provider, it is possible to sync a mobile-first solution with your platform. This allows your company to leverage the real-time, flexible nature of mobile technology, along with the robust planning and forecasting capabilities of a workforce management system.

A mobile-first solution allows your company to tap into previously unrealized frontline shift swapping data. With an integration, it becomes possible to apply that data to your workforce management system to inform advanced levels of planning and forecasting.

Bring Your Own Device (BYOD) & Security Considerations

When it comes to allowing your employees to use their personal device at work, concerns around security, labor laws, and misuse may arise. However, your employees are likely already bringing their personal devices to work and possibly using them during their shifts. It is better to proactively address concerns and set clear policies with your employees than leave matters to chance.

If employees access company systems on their personal devices, it could put company data at risk. Associates' smartphones likely do not have the same established protections set up as computers in the corporate office do. Your company's security team will prefer that measures be put in place to safeguard company information as it is accessed remotely by employees.

Key Points

- **Risks related to employees' use of personal devices can be mitigated**

- **Creating a Bring Your Own Device (BYOD) policy supports personal device compliance**

- **Mobile solutions can help by requiring employees to agree to a BYOD policy and TOS agreement before use**

- **Your mobile solution could also be configured to require secure sign-on by employees**

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Another pressing consideration for BYOD, especially for hourly workers, is federal and regional labor laws. If an employee has access to a work-related app on their personal device, they may complete work tasks at home. Under the Fair Labor Standards Act, that could be considered overtime that would need to be paid for by their employer.

The answer to these concerns is to create a Bring Your Own Device (BYOD) policy for your company. Coordinate with members of your Legal, HR, and IT teams to develop a comprehensive policy. The Society for Human Resources Management has a **useful resource for defining a BYOD policy**[1]. You should also work with your mobile solution provider to ensure the product is configured to holistically support your company's requirements.

Ideas for Balancing BYOD and Mobile Usage

- **Offer the mobile solution as an optional benefit**

- **Provide access on a company computer or tablet in the back office**

- **Ask employees to review and agree to a communication policy before using the app via a formal TOS agreement**

- **Ask your mobile vendor about limiting employees' usage to when they're in the store using geofencing**

1. https://www.shrm.org/hr-today/news/hr-magazine/pages/0216-byod-policies.aspx

Implementation

If you're in the midst of a digital transformation initiative, you likely have the next several years of strategic projects mapped out. In the meantime, we have good news: it takes less than a year to deploy a mobile-first solution. Mobile solutions are typically hosted in the cloud, meaning they do not require software installation to implement. For instance, a Shyft roll-out simply entails inviting associates to download the Shyft Mobile App or accessing the Shyft Web App in a web browser.

When assessing a mobile-first vendor, it is important to understand its standard implementation process. A provider should have the goal of partnering with you to understand your company's unique goals.

Key Points

- **A mobile solution does not require software installation to implement**

- **Deployment can happen in a matter of months**

- **Your vendor should work with you to define configurations that best support your company's goals**

Your HR, IT, Operations, and Legal departments will likely want to weigh in on the decision to implement a mobile-first solution. Your preferred vendor should be able to work with their requirements to help configure a product setup that best supports your company.

At Shyft, our implementation process includes steps for reviewing the company's goals and defining shared objectives for the partnership. We also establish key metrics for measuring and reporting on our progress following kick-off.

| Welcome	Operational Overview	Integration & Configuration	Go-Live Prep	Go-Live
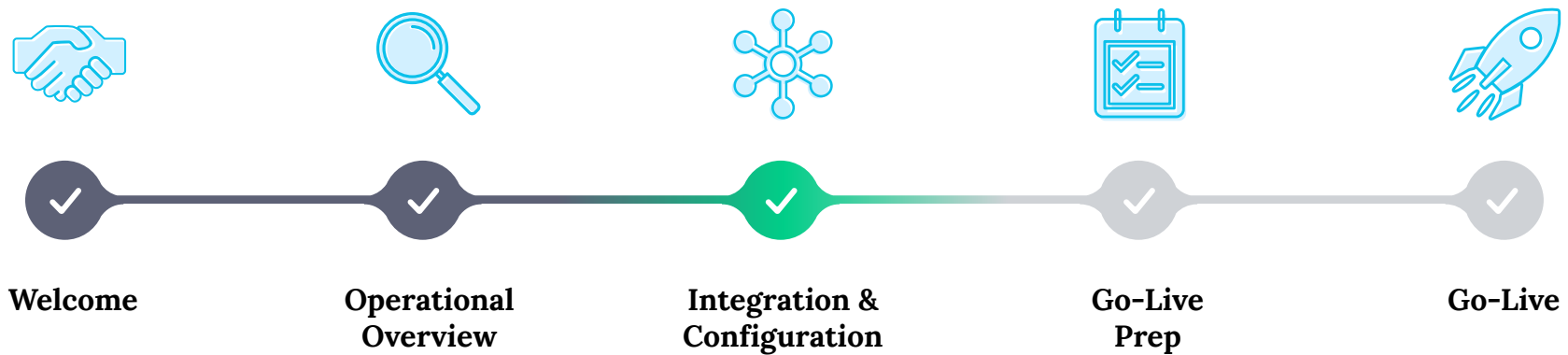
Next Steps

When it comes to vetting new technology, we recommend getting started as quickly as possible. There are plenty of conversations that need to happen across the organization to define a successful project. Once you get through those internal alignment stages, you'll be able to start testing the technology and gathering hard data to assess the opportunity. Here are the steps we recommend to start your company down the path of deploying a mobile-first WFM solution:

✓ Identify a champion that will advocate for mobile and keep the project going – *we nominate you!*

✓ Educate colleagues on the opportunity of mobile-first WFM

✓ Create an internal council of representatives from Operations, HR, IT, and Legal

- Define collective goals for a possible mobile-first WFM solution

✓ Find a technology partner that will work with you to proactively address and resolve challenges

✓ Consider engaging a systems integrator to help ensure new technology aligns with existing processes

✓ Work with your partner to define and implement a pilot to test the technology

✓ At the outset of the pilot, define key metrics to measure the success of the pilot

✓ Refine the solution based on what you learned in the pilot

✓ Deploy a mobile-first solution to your full workforce!
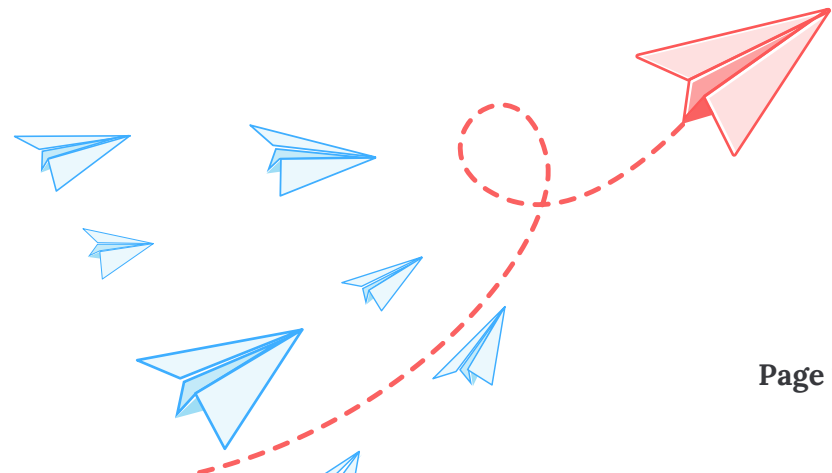
Request a Demo

To make getting started easy, you can also request to schedule a demo with Shyft. We will talk through the ways in which a mobile-first WFM solution could support your company's unique goals.

Request a Demo