



Intelligent Workforce Management What HR Leaders Need to Know

The war for talent is real and has now spread beyond tech talent to new fronts. Today, this expanding talent crunch includes the 70% of the workforce not working behind a desk—retail workers, truck drivers, nurses, and hospitality staff. These deskless workers have been sorely neglected by the HR tech market and by most HR teams.¹ If you are in any industry segment that depends on deskless workers, you need to understand how to keep them motivated and engaged—and hybrid work is not the answer.

Take retail, for example. With turnover of 60% or more,² this industry is struggling to hold on to workers to serve its customers. Inflation only makes the situation worse, and many retailers are chasing after frontline workers with ever-increasing pay. While surely necessary to even get on the radar screen for talent, you can't pay your way out of the Great Resignation. What's missing?

While we've rapidly reinvented digital tools, video conferencing, remote connection, and now even metaverse meetings for deskbound workers, we have forgotten the most essential elements for the deskless workers' day: their schedule, time-keeping, and pay—in short, workforce management.

This report provides what you need to know about intelligent workforce management: why it is the secret weapon in the war for deskless workers and how to get started on using it as a strategic lever for employee experience.

What Is Workforce Management?

To understand how to use workforce management to create irresistible experiences, we need to define it first:

“Workforce management” involves processes, approaches, and tools to optimize the hourly workforce and improve their experience. It includes workforce- and resource-planning, scheduling, time-keeping, labor optimization, and pay processing.

¹ *The Big Reset Playbook: Deskless Workers*, Josh Bersin, Kathi Enderes, PhD, and Nehal Nangia, The Josh Bersin Company, 2021.

² “[Job Openings and Labor Turnover – March 2022](#),” U.S. Bureau of Labor Statistics, May 3, 2022.

If you are in a business with hourly employees, you need workforce management. And if your key customer-facing employees are hourly—like it's the case in retail, hospitality, manufacturing, transportation, healthcare, energy and resources, for example, it's one of the most critical business processes we in HR can engage in.

The Complexity of Workforce Management

On the surface, workforce management (WFM) might seem easy. How hard could it be to schedule the right people at the right time to the right location? It is incredibly complex. For example, a retail jewelry chain may have many small locations staffed with only four to five workers, each spread out all over metropolitan areas. How do you know how many retail people to deploy, and how many ear piercers? If you have too many workers in one store, that store will lose money, and you will not be able to afford staff. If you understaff, customers may need to wait too long for their ears to be pierced, in turn reducing customer satisfaction, profitability, and revenue. Added to that complexity is the labor laws that make this kind of work management even more complicated.

It's no surprise that many line managers spend as much as ten hours per week creating and maintaining schedules, communicating changes, and trying to make sure the right people are in their locations. It's a constant balancing act to ensure there are adequate staffing levels for great customer experiences that also optimize cost.

On the flipside, employees are now used to consumer-grade experiences in their private lives, only to come into a company to encounter bewilderingly archaic approaches and technologies. Many retail and hospitality businesses still use simple spreadsheets for many of the WFM tasks.

From Paper Scheduling to Intelligent Workforce Management

Obviously, WFM is not a new discipline (see Figure 1). Any business with employees on hourly shifts needs a way to

Figure 1: The Evolution of Workforce Management

| Paper Schedules & Manual Tracking | Spreadsheets & Homegrown Tools | Payroll & ERP Systems | Intelligent Workforce Management |
|---|---|---|---|
| Handwritten schedules Posted in break rooms Major part of manager's role No flexibility for workers Little predictability Disconnected processes | Spreadsheet software Printed and copied Manager maintains Increased flexibility Some efficiencies Reduced errors | Online, browser/email-based Online employee access Manager oversees Connection with pay Scheduling + time-keeping Increased accuracy | Mobile first Real-time access AI-supported, human-driven Schedule-swapping/sharing Forecasting and optimization Fully integrated |
| Manual Tracking | Electronic Scheduling | Integrated Systems | Proactive Flexibility |
| Before 1980 | 1980–2000 | 2000–Today | Today and Forward |

Source: The Josh Bersin Company, 2022

deploy them, communicate their schedules, track their time, and determine how to pay them. But as this process usually runs in a decentralized way, most companies do not have consistent frameworks or tools.

Before 1980: Manual Tracking

Maintaining schedules and ensuring workers received the right amount of pay was a sizable chunk of a manager's role before the 1980s. They had to write and distribute schedules and manually discover and visualize where people were working at any given shift, only to invariably have these schedules changed because of lack of availability, sickness, or other factors.

Workers, in turn, were discouraged to make any schedule changes as this would throw a wrench into the precarious balancing acts of people assignments to shifts. Thus, employees were not empowered to design their own schedule. Once assigned to a shift, the employees were stuck with it.

1980–2000: Electronic Scheduling

The advent of online spreadsheets in the 1980s brought monumental improvements to these processes. Managers saved a lot of time with these tools that automatically calculated and identified gaps and overflows. Companies also developed their own systems in Lotus Notes and other

database systems, building in logic so managers didn't have to spend too much time creating business rules.

While managers saw significant time savings, employees didn't really benefit a lot. Instead of reading handwritten schedules in break rooms, they now received printouts from the spreadsheet systems. And maybe they entered their time with punch cards instead of manually updating their manager.

2000–Today: Integrated Systems

Around 2000, enterprise resource planning (ERP) and payroll systems became common, resulting in another big leap in functionality for workforce engagement. Online systems for scheduling and timekeeping made managers' lives a lot easier, integrating timekeeping, pay processing, scheduling, and employee records. Error rates dropped significantly, and time to create and maintain schedules was reduced even further.

Workers now had access to an online system to see their schedule and request updates. Built with a browser or email-based frontend, timekeeping and scheduling systems were usually not easy to use for frontline employees. At that time, they often didn't have email addresses or computers.

When smartphones became widely available, some tech providers built mobile access points for their systems, but most of them were not that easy to use or accessible for busy frontline employees.

Workforce Sharing at Scale

During the height of the pandemic, workforce sharing—sharing employees across locations— became a necessity for companies to stay in business. How it works: Rather than cutting service levels or hours of operations, retail or hospitality businesses use intelligent workforce management (WFM) to schedule workers where they have the most critical needs.

While this may sound easy, it requires sophisticated technology to get it right. Visibility is a big issue, and legal compliance, work rules, and budget adherence also factor in. Employees need an easy way to select locations and request shifts on the day and for the duration for which they are interested. Without the necessary tools, workforce sharing at scale is not feasible, but it allows for significant operational and employee benefits.

For example, a retail store has over 1,800 small retail locations in the U.S., some just a mile or two away from each other. Most of the locations only have four to five employees who work in retail or ear piercing. “Using intelligent workforce management, we will be able to quickly identify where we will have gaps in staffing and send people from one location to another—before they even come to their assigned workplace,” said deputy director of store operations, retail. “That will really help our store managers. Or, if an associate is visiting friends or family in another location, they’ll be able to easily request working at a store closer to that place, rather than having to commute very far.”

Another example: A national convenience store chain with 24-7 operations was struggling to maintain its service levels during the pandemic. In addition to high turnover, employees dropped out of shifts frequently because they tested positive for COVID-19 and had to quarantine. Using Legion’s workforce sharing, they were able to stay open. “We felt like we were putting people in harm’s way, asking them to come into work at the peak of the crisis,” said the executive director of information systems. So, the chain decided to provide hazard pay to their hourly workers and using intelligent WFM, they automatically calculated the premiums. They maintained their staffing levels better than anticipated.

Workforce sharing (or schedule swapping) is a great benefit of intelligent WFM, creating a more agile labor pool and a more flexible employee experience.

Today and Forward: Intelligent Workforce Management

The big revolution in WFM came around 2020 when human interactions were augmented with AI that learns schedules and patterns, predicts peaks and valleys in demand, and supports both workers and managers to find a better match. We call this “intelligent workforce management” because it adds a layer of intelligence to previously transactional oriented processes.

Legion, for example, built a mobile-first, easy-to-use app that allows workers to access their schedule, request updates on the go, and track their time in similar ways as they do in all other parts of their lives.

The data and intelligence also allow for “workforce sharing” (see sidebar), a way of swapping people across separate locations that supports employees and managers alike. Intelligent WFM also can expand into communications, access to earned wages, and other solutions aimed at creating an irresistible experience for frontline workers.

Benefits of Intelligent Workforce Management

Moving from spreadsheets to an intelligent WFM doesn’t just benefit operations. It’s a winning proposition for all involved parties (see Figure 2 on the next page).

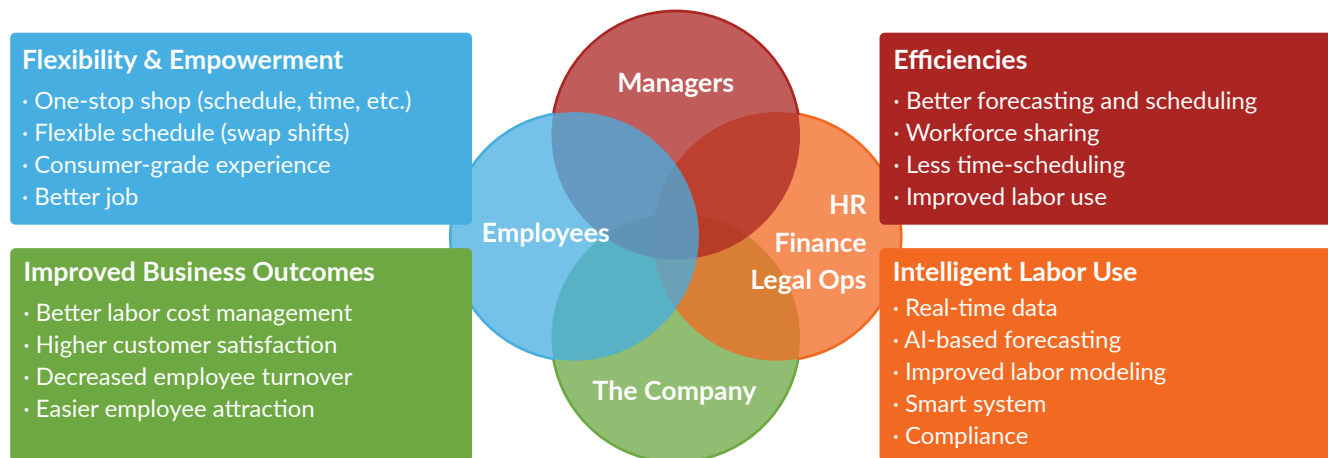
However, most companies are still using legacy processes and tools for WFM. Major retailers and hospitality companies rely on spreadsheets, homegrown systems, or old school payroll systems that were created for back-office support to serve up schedules to millions of frontline workers.

In today’s highly competitive labor market, the workforce now demands a more flexible and engaging way to find and update what’s at the heart of their workday: their schedule.

A Secret Weapon in the War for Frontline Talent

Workforce management is often handled by operations. After all, they know best how to schedule people, plan capacity, and balance cost and customer support in the most effective way.

Figure 2: Benefits of Intelligent Workforce Management



Source: The Josh Bersin Company, 2022

However, a better approach to operations owning WFM is a strong collaboration between HR and operations. Operations cares deeply about productivity, financial, and customer results while HR is best positioned to look out for employee experience, engagement, and culture. As Philz Coffee, Cinemark Theatres, and SMCP reveal, giving people flexibility and predictability of their work schedule is a significant win for employees, managers, and the company. And when you add communications and access to earned pay into the WFM system, people do not just have flexibility over their schedules but also they are better informed and financially healthy—and as we show in our playbook for deskless workers, these are all critical pieces of an irresistible experience.³

Linking WFM into your overall employee value proposition can help attract hard-to-find deskless workers. For example, Philz Coffee markets schedule flexibility and the ability to work at other locations as a perk on their careers page.

The Deskless Experience Is Way Behind

Our Employee Experience research, with more than 1,300 companies in over 80 countries around the world, shows that the hourly workers' experience in retail, hospitality, healthcare, and other industries is way behind that of “deskbound”

³ *The Big Reset Playbook: Deskless Workers*, Josh Bersin, Kathi Enderes, PhD, and Nehal Nangia, The Josh Bersin Company, 2021.

industries.⁴ What this means: creating a great experience for hourly workers is not easy to do, and most companies don't do it particularly well.

How can you create an irresistible experience for frontline workers? Our Employee Experience Framework shows that an essential dimension is flexible hours and workspace (see Figure 3 on next page). While hybrid work approaches now make it easier than ever to offer that flexibility to deskbound employees, hourly workers crave flexibility too.

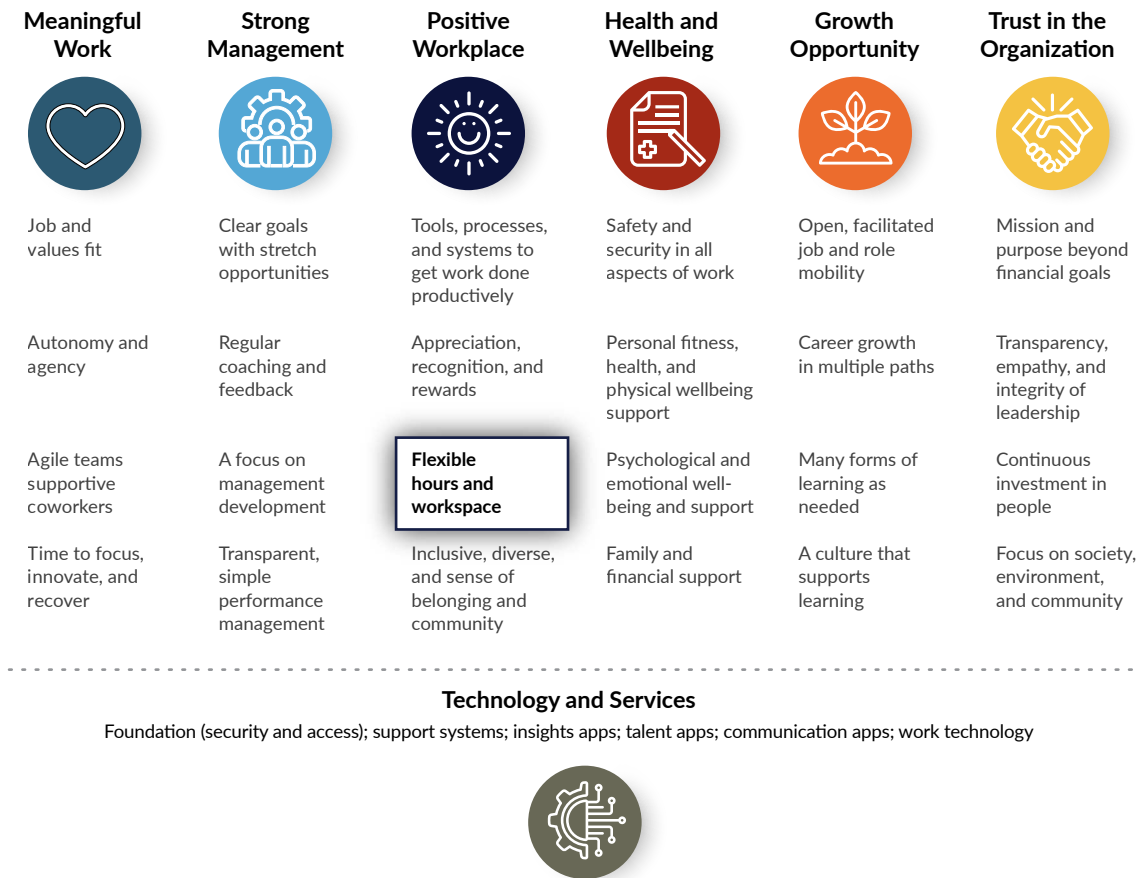
While all dimensions of deskless experience matter, creating a more flexible and predictable experience is key to productivity, performance, customer satisfaction, employee engagement, and retention.

Flexibility also links to better work environments, reduced stress, and higher performance, but deskless industries are much less effective in creating an environment where people have flexibility in their schedule (see Figure 4 on page 6).

These differences are unambiguous: while three out of four deskbound companies give people flexibility to decide when, where, and how to work, only about one in ten deskless companies do that. And deskbound companies are four times more likely to design work to allow for rest and creativity than deskless companies.

⁴ Ibid.

Figure 3: The Irresistible Experience Framework



Source: The Josh Bersin Company, 2021

Intelligent WFM can be a game changer—creating a similar experience as deskbound workers have for deskless hourly workers.

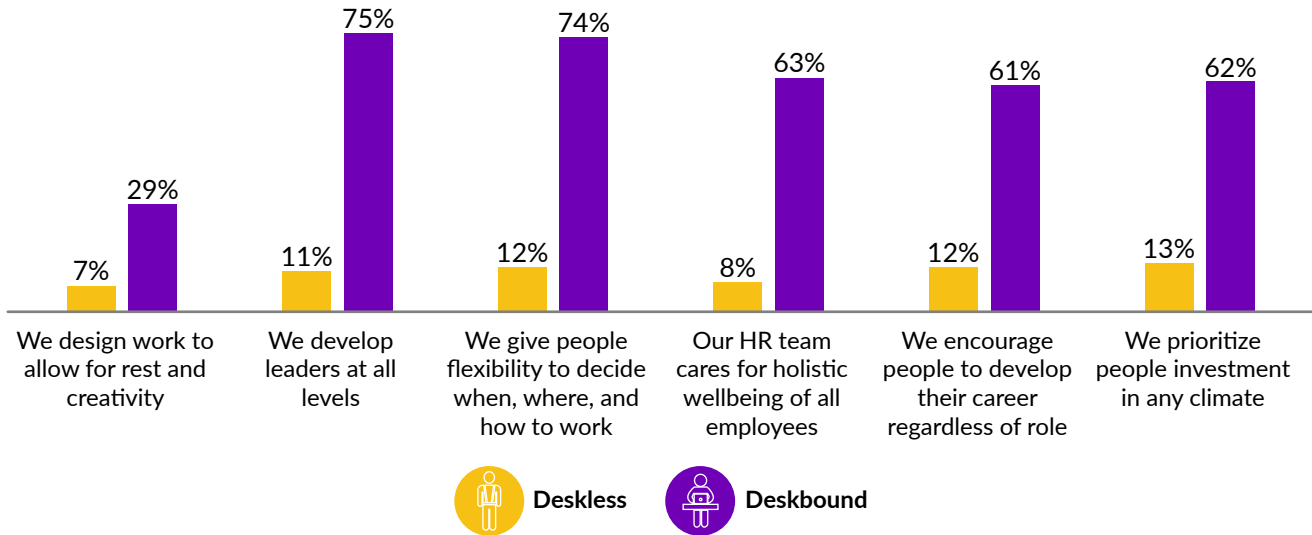
Getting Started with Intelligent Workforce Management

If you are an HR leader in a deskless industry, you need to act now. Intelligent WFM is a key component of creating a more flexible and predictable experience. To get started with intelligent WFM, it's important to define your role and to collaborate with operations, finance, legal, and IT for an integrated approach (see Figure 5 on page 7).

Workforce management, done right, is the strategic backbone of your operations, tying together payroll, strategic workforce planning, recruiting, training, operations, and financial performance. Integration with other core systems is key and using a technology that easily connects to your payroll, HCM system, financial planning, and other systems is also important. Next-gen workforce-planning tools are set up with prebuilt integrations to most of these tools, so you do not need to worry about adding technical complexity to your stack.

While HR cannot drive it alone, the HR team must ensure a collaborative approach to the initiative to create strategic value for the company, and to engage and retain hard-to-find hourly workers.

Figure 4: Flexibility in Deskless vs Deskbound Industries



Source: The Josh Bersin Company, 2022

WFM: The New Killer App for Frontline Workers

When we talked with HR and operations leaders in various industries, we heard the trend loud and clear: While frontline employees visit core HCM systems or other tools periodically, the system that contains their schedule and helps them track time is used daily. Many of your deskless workers are digital natives, whether Gen Y or Z. These workers are not equipped to or interested in using clunky browser-based systems designed for back-office administration.

Making your scheduling and timekeeping system engaging, easy to use, and conducive to creating a flexible environment

will not just help you get better data and insights on the skills, capabilities, and workforce needs but also help you optimize your labor cost and customer results.

Intelligent WFM will also create a much better employee experience for the 70% of employees who don't work behind a desk but power our lives on the shop floor, in restaurants, driving trucks, or serving us on planes and trains.

Intelligent WFM systems, designed for digital natives, will be much more successful and will, in turn, create an irresistible experience for your important deskless workers that's second to none.

Figure 5: Key Questions for Integrated and Intelligent Workforce Management (WFM)

| | Role in Intelligent WFM | Key Questions to Address |
|-------------------|---|---|
| HR | Collaborate with finance, legal, and operations for an integrated experience, more engagement, and less stress. | How do we create an environment of flexibility and predictability for employees? |
| Operations | Determine optimal staffing levels for productivity, financial benefit, and customer experience. | How do I provide managers with tools and resources to schedule the right people at the right time and the right cost? |
| Legal | Identify legal compliance requirements for WFM. | How do I equip managers with guidelines and rules for legal and compliance policies when scheduling people? |
| Finance | Develop procedures to balance workforce costs with the right service levels. | How do I incorporate guidelines into the WFM tool to help managers make the best scheduling decisions? |
| IT | Put WFM tools into the tech stack of frontline employees and managers. | How do I integrate WFM tools into EX tools, manager technologies, and the HCM system for a seamless experience? |

Source: The Josh Bersin Company, 2022

Cinemark Creates Flexibility and Predictability for All Workers

Cinemark Holdings, Inc., is an American movie theatre chain that began operations in 1984 and has since managed theaters with hundreds of locations throughout the U.S. and Central and South America. It is headquartered in Plano, Texas, and has nearly 20,000 domestic employees.

Legacy Workforce Scheduling System Falling Behind

When Marie Zablocki, VP of operations administration, joined in 2019, the company was running a legacy version of workforce scheduling in their on-premise HR/payroll system. Zablocki, a retail operations veteran, was tasked with finding and implementing a new approach and system for workforce management. The previous system did not provide employee self-service capabilities, had limited communication abilities, and was complex for managers to use.

A Need for a Modern, Mobile Experience

“In today’s day and age, it is more important than ever to ensure you can reach your audience where they are, and that includes workforce management. Cinemark was eager to adopt a new system that would increase efficiencies and offer the ability for team members to easily see schedules and manage tasks on their mobile devices.” The goal was to find an app that enabled people across the circuit to see their schedules online, track time, and swap shifts.

Zablocki and her team went on a listening tour with retail companies, other movie theatre chains, and hospitality industry counterparts.

“In our search, we prioritized finding a system that would be able to write first-draft schedules for managers to review using Cinemark-developed labor standards,” explained Zablocki.

Modernizing Workforce Management and HCM Together

In addition to seeking out an updated workforce management (WFM) system, Cinemark was looking for a new HCM and payroll system. This combined search effort allowed the two teams to share key learnings as well as ensure the programs selected would work well together.

After vigorous reviews and assessments, the teams decided on a leading HCM cloud system and Legion for the WFM system. “We have nearly 350 locations, and each location is unique in the way they operate. It’s a complicated business, including hospitality, entertainment, and teenage workers.”

Meeting Implementation Timelines in a Global Pandemic

Zablocki and her team started the implementation in February 2020 with the goal of a pilot phase in August and a full rollout in 2021. Despite all the challenges that came with the pandemic, the Cinemark team was able to meet their implementation timeline, which was supported by the program’s ease of use. “When we did the scheduling pilot, we also did training. The system was very easy to use, so we were up and running quickly,” Zablocki said.

Mobile Access, a Simple Experience

“We loved that the new app has a very modern look and feel to it,” said Zablocki. “That appeals to our employees. It’s really simple. I also wanted my team to be able to do the configurations and the management of the system without having to involve IT every time.”

As the WFM system contains scheduling and timekeeping, adoption was fast. “Employees are in Legion literally every day, and they like it because it’s mobile and it’s simple.”

Next Up: Labor Forecasting and Workforce Sharing

Next, Zablocki wants to use more of the labor forecasting and workforce sharing functionality. “Our business is so complex; we need the system to help us optimize our labor schedule. Over time, I know we can build in the business rules and make that happen, too.”

For Zablocki and the HR team, using an intelligent WFM system has been a game changer to attract and engage a young, always on-the-go workforce to, in turn, create great experiences for their customers. ■

A Retail Chain Transforms the Employee Experience with Workforce Management

An American retailer of accessories, jewelry, and toys, primarily aimed toward female tweens and teens, the company operates about 4,000 stores in the vast majority of all U.S. shopping malls, with 19,000 employees. In addition to selling jewelry, ear-piercing is a big part of the business. Most locations are small and in urban areas, often close together, and with only four to five employees at any given time.

A Homegrown Workforce Management System with Basic Compliance Features

For decades, the company had been operating with a homegrown workforce management (WFM) system that helped maintain basic compliance features but did not support the labor modeling, employee flexibility, or forecasting that the deputy director of store operations was looking for.

“It’s really bare bone, and our employees get their schedules on printed schedules in the break rooms. When everything else in your life is on your smartphone, that’s just not a great experience,” the director explained.

A Modern Labor Driver Model for More Accurate Planning and Staffing

In November 2021, all stores were switched to a new labor driver model—forecasting labor needs based on drivers like store traffic, specific patterns of demands, and other factors. In spring 2022, managers still update schedules based on labor drivers in the homegrown system.

“Getting to Legion will bring workforce management into the twenty-first century and help managers be much more efficient in forecasting and scheduling labor based on demand drivers,” the director continued.

Bringing Scheduling into the Twenty-First Century

“Today, they still need to manually figure out who should be working when and where, taking all those drivers and then plotting them on the schedule to tell people, ‘Here’s where you need to be, at what time, and on what day.’”

Today, employees can only find their schedules as printouts on the walls of break rooms. To request shift changes, they need to call their manager to ask for the change, and then check in the break room to see if the change has been approved.

The director explained: “New employees are especially taken aback by these cumbersome manual processes, and I bet we have lost candidates because of that. Our average store employee is 25 years old, and everything they do is mobile. For us, not being able to offer a mobile experience in scheduling is really quite damaging.”

Workforce Sharing for Increased Flexibility and Better Staffing

As the stores are so small and many of them close together, the workforce sharing functionality will be especially valuable for the company—for both operations and employees. “When we know one store will be underutilized, it would be great to send workers to a different location down the road so they could do an entire shift there, instead of not being able to complete the shift in the location that doesn’t have enough work for them right now,” said the director.

The Store Workforce as the Customer

The retail operations team selected Legion as the WFM system because of its ease of use and mobile-first capabilities. “I see our store workforce as my customers, and I need to give them what they need to do the job that we’re asking them to do. What can I give them to take unnecessary things off their plate so that they can focus on their customer, providing the best customer service, the best ear-piercing experience—and not have to worry about all these other things in the background.”

A Huge Step Forward

The feedback from testing the WFM system has been overwhelmingly positive. The director said, “People feel it’s a huge step forward. They can see their schedules on the phone

app, change schedules, and swap shifts. Compare that to the printed schedules in the breakroom. It's night and day."

The Schedule: The Sticky App for Hourly Workers

The WFM system will integrate with the company's HCM on Workday. The team foresees the schedule will be the new sticky app for employees. "Everybody will go there every day to see when they work, and also to swap shifts. So, this new app will be really high traffic for our store employees, and we'll use this for other areas like communications or news, too."

In a hypercompetitive labor market where retail workers and supervisors are in high demand, offering them an easy, user-friendly, and intelligent WFM system will be key to the company's future business success. ■

About the Authors



Josh Bersin

Josh founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. He expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership and became a recognized expert in the talent market. Josh sold the company to Deloitte in 2012 and was a partner in Bersin by Deloitte up until 2018.

In 2019, Josh founded the Josh Bersin Academy, a professional development academy that has become the "home for HR." In 2020, he put together a team of analysts and advisors who are now working with him to support and guide HR organizations from around the world under the umbrella of The Josh Bersin Company. He is frequently featured in publications such as *Forbes*, *Harvard Business Review*, *HR Executive*, *The Wall Street Journal*, and *CLO Magazine*. He is a popular blogger and has more than 800,000 followers on LinkedIn.



Kathi Enderes, PhD

Kathi is the senior vice president of research at The Josh Bersin Company; she leads research for all areas of HR, learning, talent, and HR technology. Kathi has more than 20 years of experience in management consulting with IBM, PwC, and EY and as a talent leader at McKesson and Kaiser Permanente. Most recently, Kathi led talent and workforce research at Deloitte, where she directed many research studies on various topics of HR and talent and frequently spoke at industry conferences. Originally from Austria, Kathi has worked in Vienna, London, and Spain and now lives in San Francisco. Kathi holds a doctoral degree and a master's degree in mathematics from the University of Vienna.

The Josh Bersin Company Membership

The Josh Bersin Company provides a wide range of research and advisory services to help HR leaders and professionals tackle the ever-evolving challenges and needs of today's workforce. We cover all topics in HR, talent, and L&D. The Josh Bersin Academy—built on our research and powered by Nomadic Learning—helps HR practitioners grow key foundational skills. Our corporate membership program provides HR teams and senior leaders with the skills, strategies, and insights to build cutting-edge HR and people strategies through a combination of research, assessments, professional development, exclusive events, and community. In 2022, The Josh Bersin Company introduced the Global Workforce Intelligence (GWI) Project to guide market-leading businesses and their leaders through the challenges of industry convergence while remaining future-focused.

For more details, contact us at info@bersinpartners.com.