



# BUILDING THE PERFECT ONLINE SCHEDULE

THE **R A I L**



HotSchedules®

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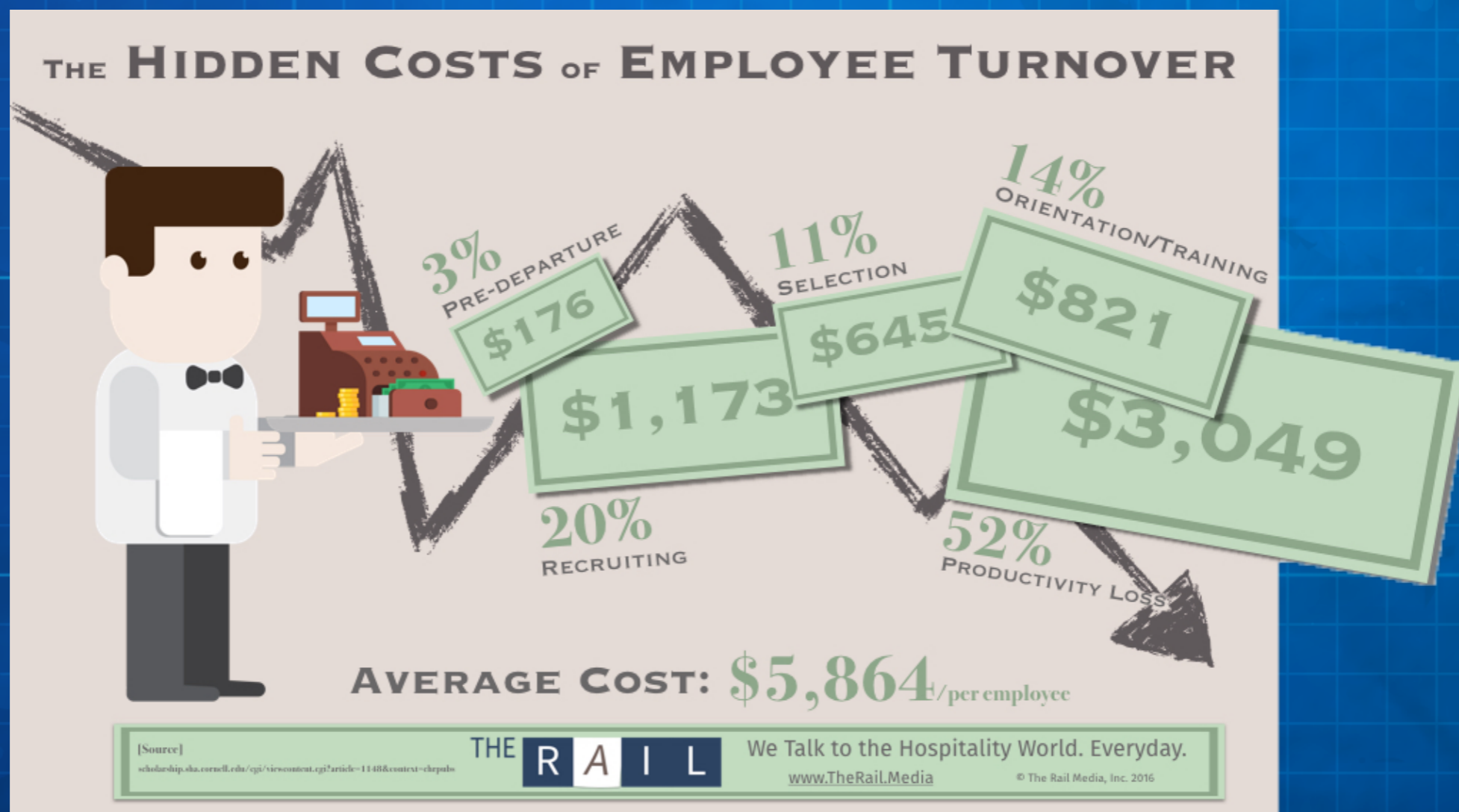
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# HOW GREAT SCHEDULES = INCREASED PROFIT

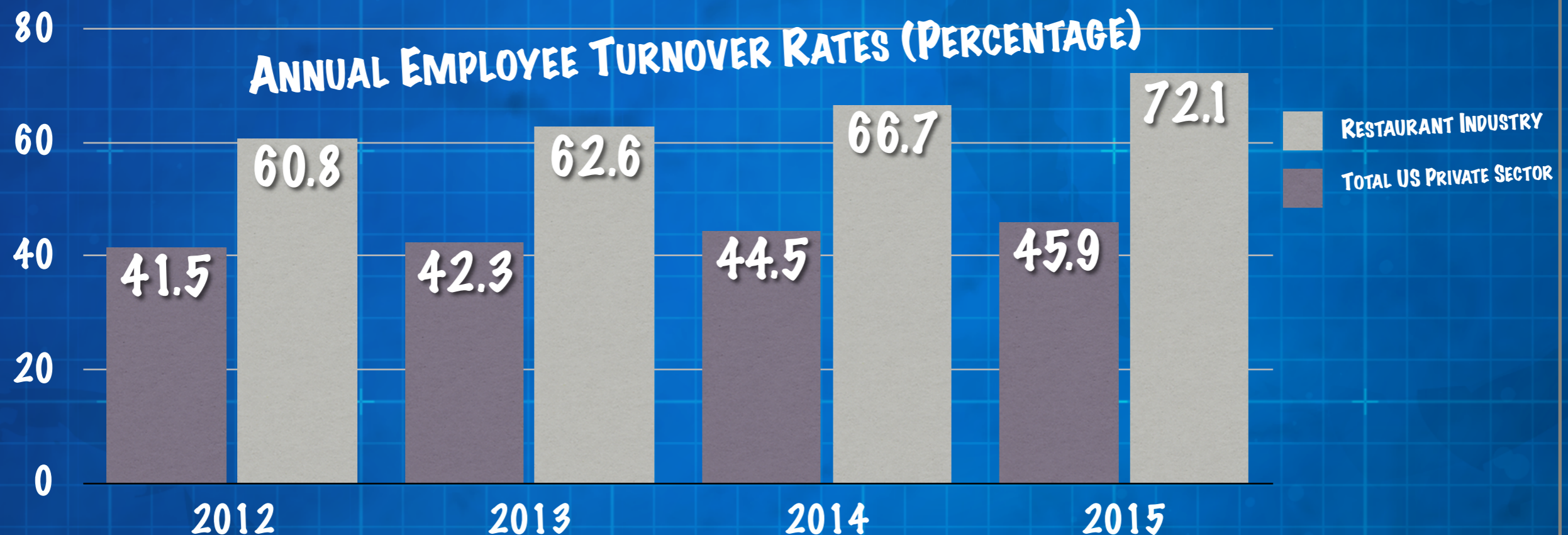
GREAT SCHEDULES CAN REDUCE YOUR OVERALL TURNOVER,  
BOOSTING YOUR BOTTOM LINE!

For the past year at The Rail, we have been focused on the debilitating costs of turnover for restaurant operators.

In our highly accessed webinar and resource guide on the War for Talent, we show how employee turnover costs the average restaurant roughly \$146,600 annually (almost \$6,000 per employee).



**Couple that with the current five-year trend of increased turnover in our industry and you have a recipe for real trouble in your business.**



**While there are many ways to improve your turnover performance, none is as potent and immediately impactful as creating great schedules.**

# How, you ask?

**The schedule is the center-point of managing the employee experience in your restaurant. Every shift has to be scheduled.**

- >> Their training is controlled by the schedule.**
- >> Who they work with is impacted by scheduling.**
- >> How much they earn is dictated by their schedule.**

**In fact, many times employees overall work satisfaction is significantly influenced by their schedule.**

**Great schedules require time, care, planning, and maintenance. This can be a costly endeavor, but it's not something you should short change.**

**You need to connect to any best practices that will improve your scheduling performance.**

**Think in terms of food production. You wouldn't eliminate the recipes from the food you create, right? That would cause chaos and inconsistency in the product you deliver to guests.**

**The same is true for scheduling. All operators need to embrace digital & online scheduling.**

**Using our recipe analogy, any great schedule is made of various ingredients. Things like:**

- >> Employee availability**
- >> Time off requests**
- >> Sales projections**

**These all factor into how a schedule is built. With digital schedules, you eliminate much of the chaos of the schedule process.**

**Gone are tensions surrounding shift-change management or questions about days off requests being “lost.”**

**Instead it provides a transparent approach to the process and improves the schedule writing process.**

**Using a platform designed to facilitate better scheduling will improve your operation and likely reduce your turnover, which — as we've shown — will save you a ton of cash.**

**With the cost of scheduling services so low now, if you save only one employee from leaving you have created real value in your business.**

**This guide is specifically intended to give you a primer to what great digital schedule implementation looks like. Some of what we have provided is traditional management insights and some is specific to writing schedules on a digital platform.**

**The intention is to show you what start to finish great process looks like for schedule writing and how to incorporate a digital platform to make it the best it can be.**



**Andrew Jaffee**  
**Founder**  
**The Rail Media**

# WHY ONLINE SCHEDULING?

BECAUSE STRATEGIC SCHEDULING STIMULATES SUCCESSFUL  
SHIFTS & SHOPPER SATISFACTION!

**Why do we as managers take for granted the phenomenal opportunity we have in making deliberately great employee schedules?**

**Why is it that we copy and paste the same shifts for the same employees every time?**

**Why do we allow ourselves to lose great people because we didn't take a few extra minutes to write strategic, performance-based schedules?**

**Why did we let the drama play out negatively because we chose the wrong actors?**

**These questions could go on and on. We believe the answer lies somewhere between complacency (managing the status quo) and plain old convenience. It is simply easier to take the last schedule and reuse it, despite its negative impacts and significant cost.**

**A wise restaurant operator once enlightened us with the idea of the “perfect shift.” You know, the shift where everything goes right and all customers are blown away by an impeccable experience.**

**This is just a romantic idea meant to inspire managers, right?**

**Maybe not.**

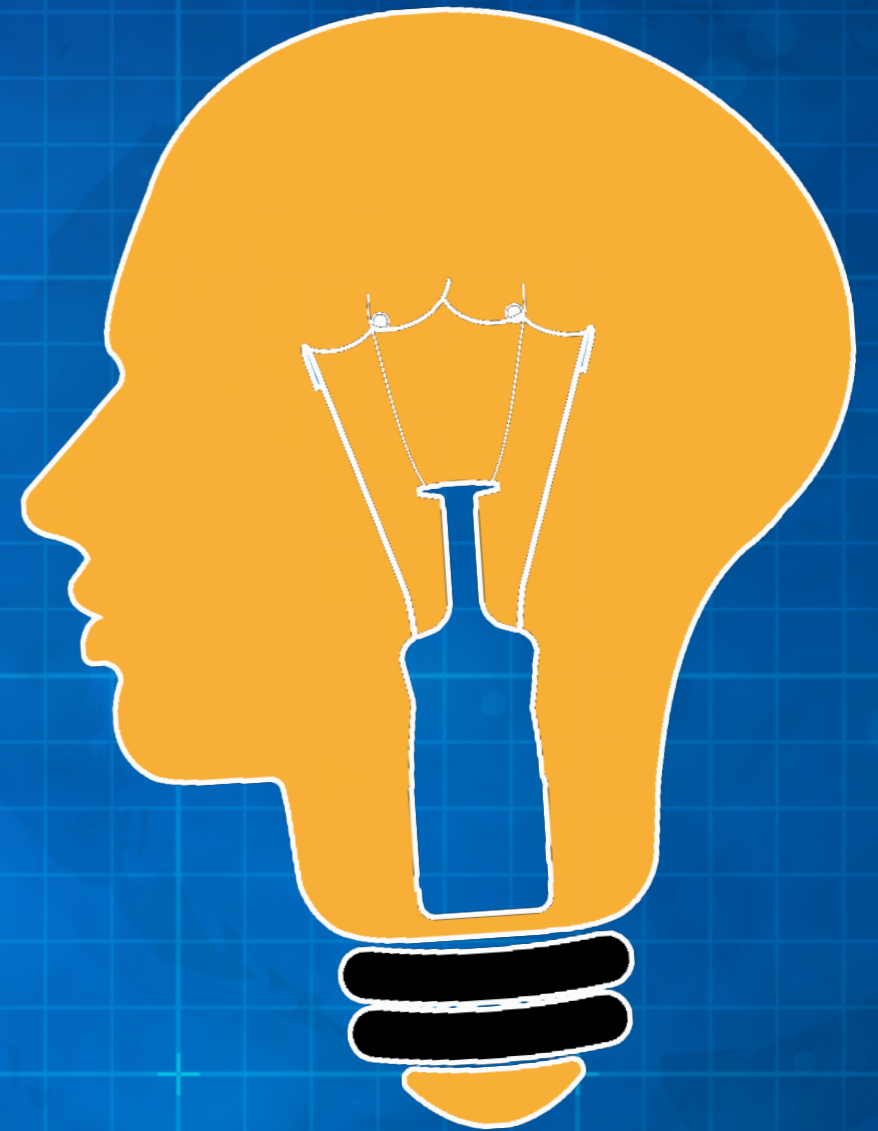
**You can achieve this goal by focusing on a few key things...**

# VISUALIZE THE SHIFTS

Number one is visualizing the shifts you are planning and knowing the skills of the players involved.

Having the right people working together is often half the battle.

There is an old British military adage that goes something like this:  
“Proper planning and preparation prevents piss poor performance.”

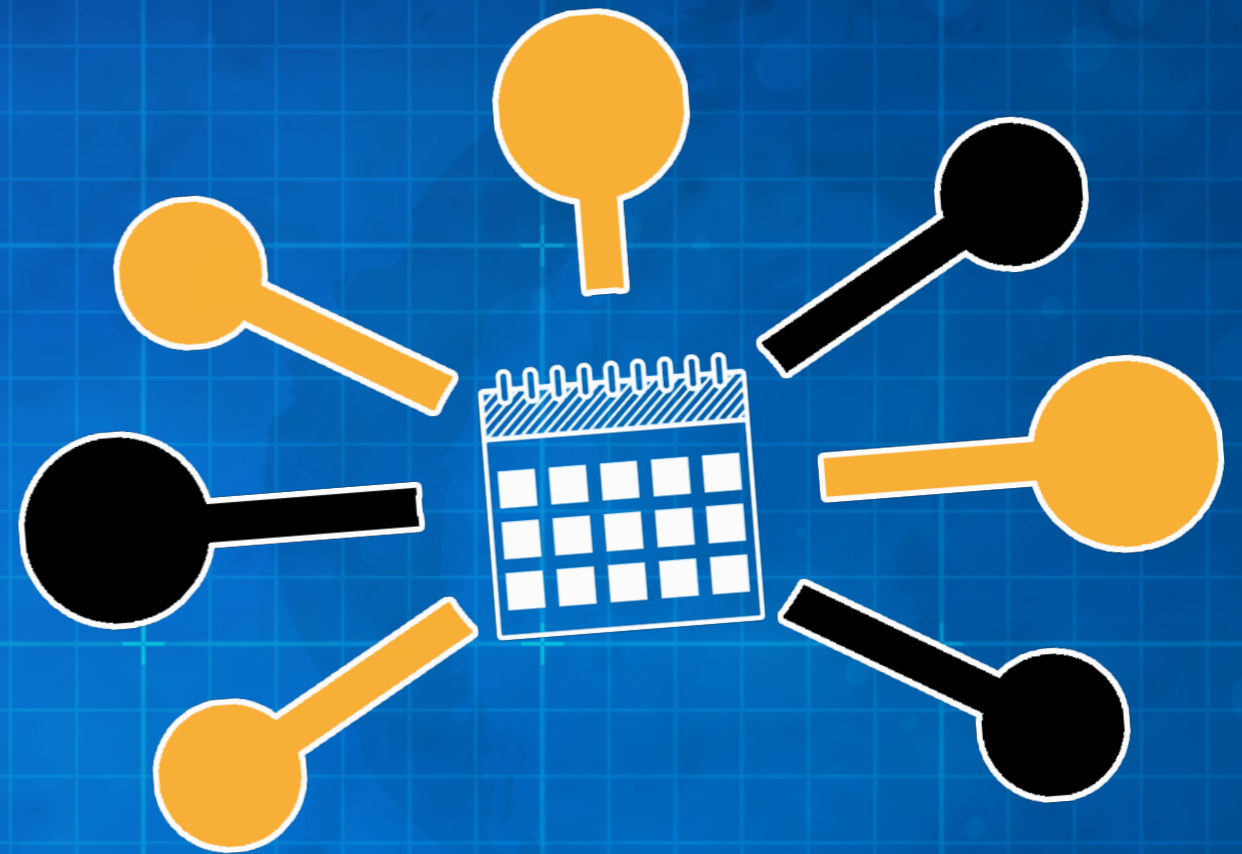


# DISTRIBUTE EVENLY

Number two is properly distributing great shifts among your A players.

These employees, when properly scheduled, can elevate the performance of those around them.

They are often the best marketing investment you can make because they help you create a positive emotional connection with your guests and increase overall patronage.



# IT'S AN INVESTMENT!

The third and final key to this philosophy is ensuring that you as a manager view this process as an investment and not another task on your endless to do list.

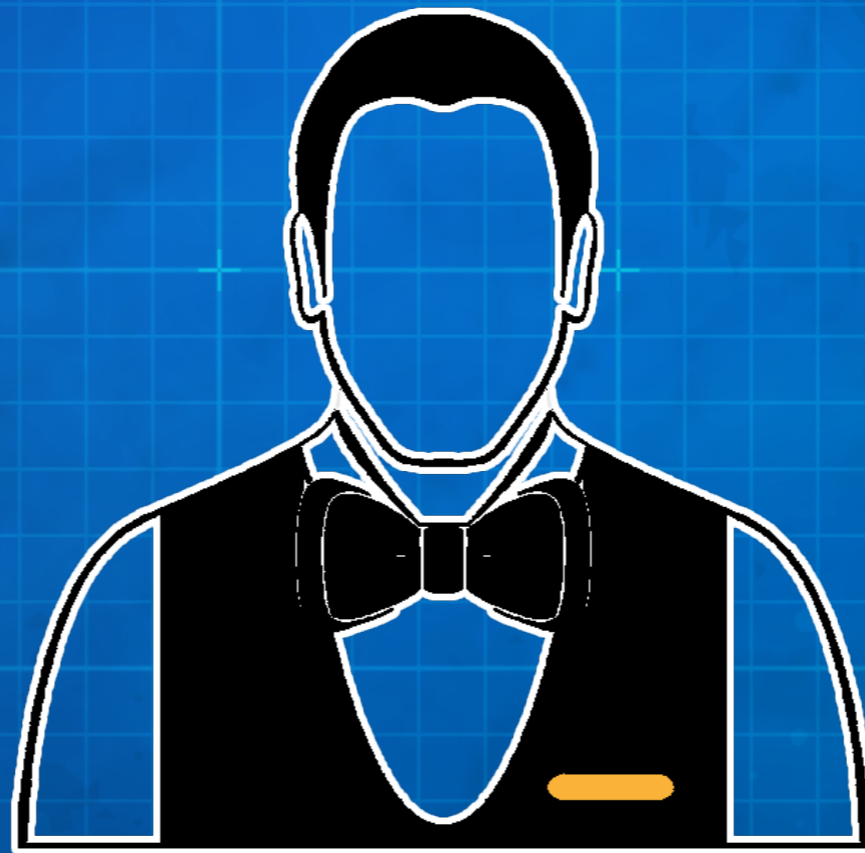


Managing is one of the hardest jobs in the world, but it can also be one of the most rewarding once you've mastered strategic scheduling.

Thus, we propose a new adage: "Strategic scheduling stimulates successful shifts & shopper satisfaction."

**Our country was founded on the idea that happiness is something you pursue, a notion reflected each time you strive for the elusive perfect schedule.**

**Can you or your business afford to take this opportunity for granted?**



# 5 REASONS YOU NEED ONLINE SCHEDULING SOFTWARE

SPOILER: IT JUST MAKES YOUR LIFE EASIER!

**If you were to describe the manual process of creating, managing and communicating employee schedules, what would you say?**

**Chances are your complaints sound something like “time-consuming, inefficient and never accurate.” You might have some other four-letter words, but we won’t print those here (you can share them with us on Twitter though).**

**What’s interesting — especially in the restaurant industry — is that a lot of managers continue to use manual, outdated methods simply because it’s the way it’s always been done. (Sound familiar?)**

**Pen & paper, sticky notes, even spreadsheets and voice mails solve the immediate problem—getting someone (anyone!) in to work. But that’s about as far as those systems can take you.**

**Here are some common scheduling challenges restaurant managers face when they’re not using online schedule software. How many do you currently deal with? How much time are you losing to these inefficient processes?**

# 1. COMMUNICATION IS ALL OVER THE PLACE

On their own, paper schedules might not seem like the worst place to keep track of who's working and when.

But rarely can you just set it and forget it. Schedules change. Employees have last-minute emergencies. People don't answer phone calls and human mistakes happen all the time.

In a world where everything is accessible from the tiny computer in our pockets, the last thing your staff wants to do is come into the restaurant every time they think the schedule has changed.



## 2. MANAGERS ARE SWAMPED IN SHIFT SWAPS

Restaurant managers using outdated employee scheduling methods are essentially full-time switchboard operators. Someone calls in to make a swap or request time off and you always have to be there ready to answer and make the connection to the schedule.

What's worse is that instead of it being one switchboard, you're bombarded with requests from all kinds of different channels – face-to-face conversations, text messages, emails, phone calls, voice mails on your cell phone, voice mails on your work phone, etc.

In fact, you could have a conversation with one person about a shift swap in every single one of those channels.



# 3. EMPLOYEE TURNOVER IS HIGH

Because our lives are not 100% static and predictable, schedules will always change. But with paper or spreadsheet schedules, making those changes on the fly is hard.

You either are so flexible that things are chaotic, or you do the opposite and lock schedules down so hard people don't have the flexibility they want in a restaurant job.

A new report from the Economic Policy Institute noted that employees with unstable work schedules suffer significantly more work-family conflict and have higher work-related stress. High-stress leads to unhappy employees, which in turn, increases turnover. And turnover costs restaurants more than \$146,000 per year!



# 4. YOU'RE LOSING MONEY ON OUTDATED PROCESSES

In the restaurant industry, you're either spending time or you're spending money. The goal is that the time and money spent gets a return. That's business, eh?

But if you don't have efficient systems in place, you're bleeding both.

With restaurant failure rates higher than almost any other industry, there's not a lot of time or money to waste on systems that don't work for you and your staff. There are simply too many ways to lose money to not have a system in place that helps managers and owners manage the second most expensive cost center for restaurants — labor.



# 5. YOU'RE TIRED OF WASTING TIME

Did we forget to mention how much TIME you'll be saving?

Time savings can be found in every single one of these points. Time saved communicating to employees.

Time saved figuring out how much staff you need to meet historical guest and sales numbers. Time saved approving shift swaps. Time saved dealing with payroll questions and tip card adjustments.

There are time savings in every single nook and cranny of an online employee scheduling solution.



# 7 WAYS TO CREATE AN ONLINE EMPLOYEE SCHEDULE

HOW TO CREATE A SCHEDULE ... OH LET US COUNT THE WAYS.

**Over the years, we've develop seven methods for creating and communicating schedules.**

**If you're just starting out, you're probably going to find the first couple of methods helpful.**

**If you've integrated your point of sale system (or intend to) then the forecast, template and auto scheduler methods are going to be right your alley.**

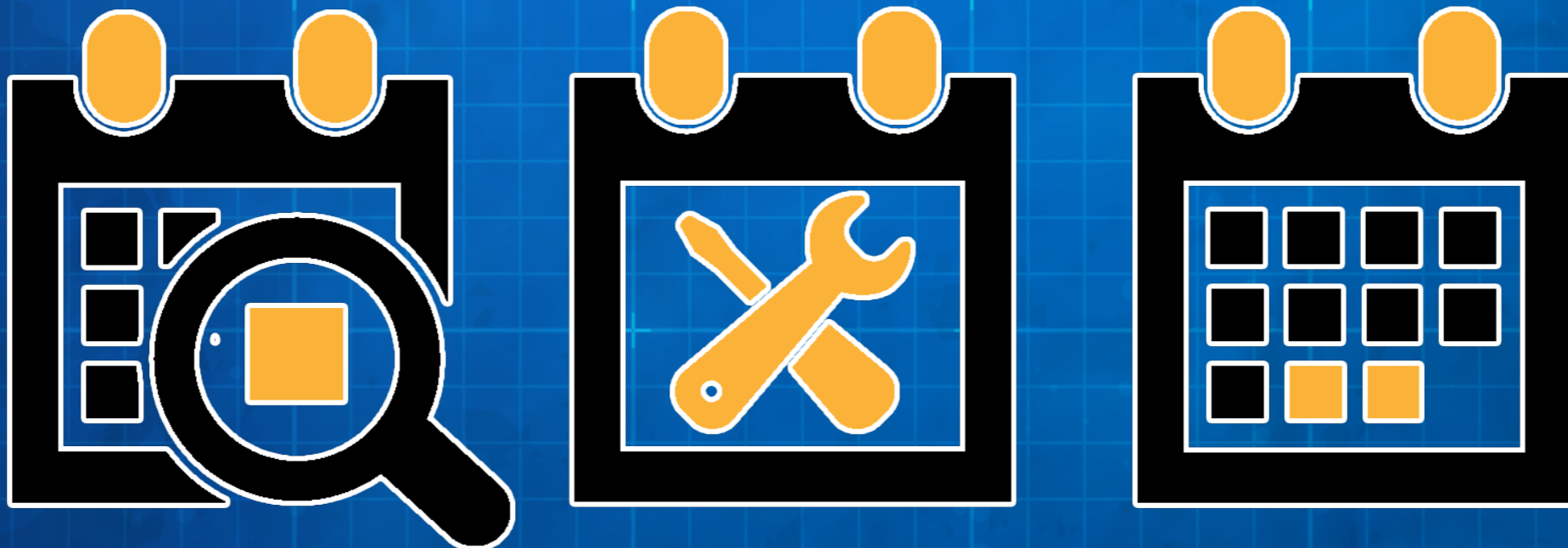


# 1. FROM SCRATCH

In many cases, you can begin by creating the employee work schedule from scratch. This can be done by looking for employee availability, requests for time off and the most reliable employees.

You can then use this information and make adjustments on an as-needed basis.

This method works if you're creating schedules for the first time, if you have a small group of managers or if you suddenly see an up-tick in sales and need to adjust your staff volume.



## 2. FROM A SCHEDULE TEMPLATE

If you're looking to generate a recurring schedule, templates are a great approach. Employee scheduling templates can be generated based on sales, budget, labor or other requirements.

For instance, you might generate a schedule template for different levels of sales, one for \$40K, \$60K or \$480K (you could even make these thresholds.)

You could also create a templated schedule for particular events like Super Bowl weekend or Mother's Day.

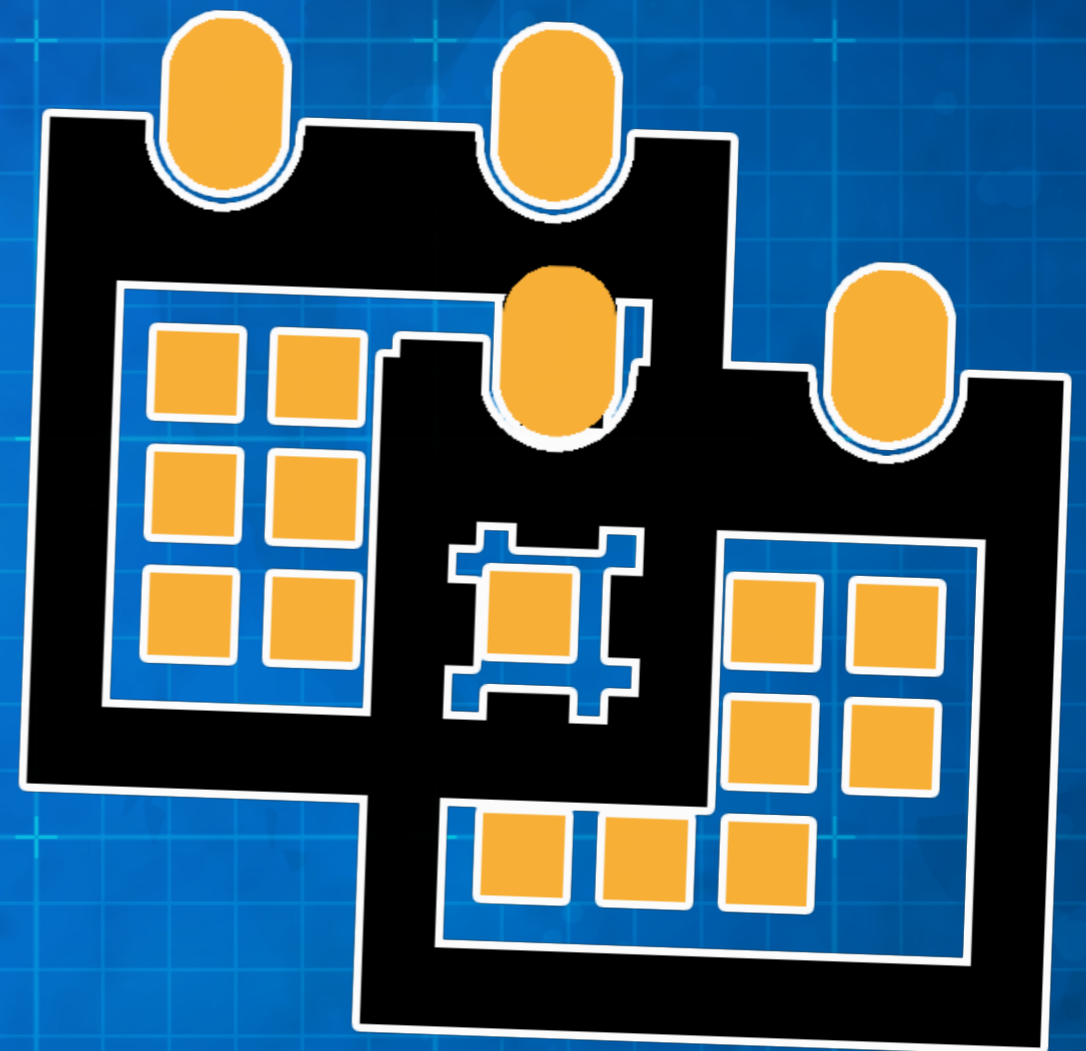
In HotSchedules, if you recognize that you're creating a schedule or copying a schedule frequently, there's an option to create a templated schedule from an already created schedule.

# 3. COPY SCHEDULES FROM WEEK TO WEEK

Copying a schedule from a previous week is similar to the scheduling template method, but instead of having a general schedule (no employees in it) you can create a schedule with shifts and employees that you can copy from week to week.

An example might be a kitchen schedule.

You know the same chefs and cooks are working every week for the same shifts, so you would copy that schedule from week to week. Each week you can go back to make adjustments if employees were late or clocking too many hours.



## 4. FROM A FORECAST

Some of the best schedules are created using the forecasting method.

Forecasting allows managers to quickly apply appropriate templates to future weeks based on projected sales figures.

Forecasting is most effective if you have a number of templates created that correspond to different sales levels.

Once a schedule is forecasted and posted, managers will be able to see the labor variance between the forecasted template and the schedule that was actually posted.



# 5. FROM THE AUTOSCHEDULER

The AutoScheduler in HotSchedules allows managers to define specific parameters for how shifts will be assigned to employees. There are three ways to configure the AutoScheduler:

- » **DAY PRIORITIES:** This setting allows you to specify a priority for what days are more important with regards to distributing shifts.
- » **THRESHOLDS:** This setting allows you to specify how many of your highest and lowest skills are eligible to work in a single day. The AutoScheduler will then avoid giving you too few of your best employees and too many of your least skilled employees.
- » **LOCATIONS SKILL LEVELS:** This section allows you prevent employees from working in locations if their skill level is not high enough. When the AutoScheduler references this setting, it will not give the unassigned shift to an employee if their skill level does not match what is specified for the location.

# TIPS!

## WHEN TO USE TEMPLATES VS. COPYING VS. AUTOSCHEDULER

Copying schedules from week to week saves managers time if the same people are scheduled for the same shift.

Unfortunately, a lot of managers will use the copy schedule method for any kind of schedule and then spin their wheels adjusting shifts and moving people around.

What would make more sense is to create another template, create a schedule from scratch or use the AutoScheduler.

# 6. USE EMPLOYEE RANKS TO CREATE SCHEDULES

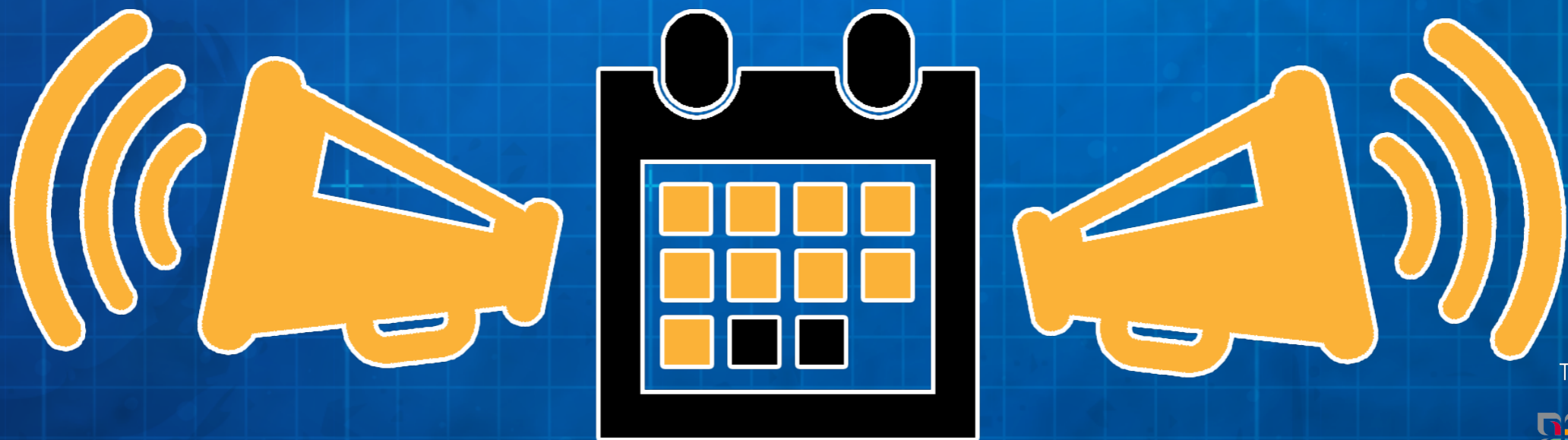
In HotSchedules, having certifications and skill level rankings appropriately set for employees in the Settings section funnels into the AutoScheduler which assigns employees to a schedule based on job codes, locations, availability and skill and certifications.



# 7. COMMUNICATE SCHEDULES IN A SINGLE CLICK

Once you've got your schedules created, communicating them to the entire team can happen with a click of a button. Employees will receive notifications through email, online or on their phones and will have access to their schedule any day, and at any time.

If changes are made to their shifts, they will be notified, keeping everyone informed and managers out of the crazy last minute call mix.



# CHOOSING THE RIGHT PERSON TO MANAGE THE SCHEDULE

THEY'LL MAKE OR BEAK YOUR BUSINESS.

**She who writes the schedule holds enormous power in your restaurant.**

**Schedule management is an onerous task that requires a specific mix of effort, empathy, discipline and thick skin -- not necessarily in that order. Too often that responsibility is given lightly and without sufficient consideration.**

**In many instances, it's a job assigned based on a training track. While every manager should know how to write schedules before they can move forward in their career, not every manager is actually capable of the task.**

**You should conduct an analysis of whoever you assign scheduling to. You should know their strengths and where they may stumble. We've outlined five considerations before naming a schedule manager.**

# ARE THEY DISCIPLINED?

Sure, discipline is a good characteristic for any manager and should be applied to all of their tasks. However, when it comes to the schedule, there are so many moving parts. Someone who falls even a little short can completely disrupt your operation and burn your staff out. Whether it is managing days off requests or availability, not exhibiting discipline can be disastrous.

The good news is that digital scheduling makes this much easier, but it doesn't eliminate the need for that discipline.

It starts by posting the schedule on time. Schedules are about deadlines. Your entire staff plans their lives around it. Late schedules will translate into real problems for your staff and your restaurant.

How can you ensure staff arrive on time if the schedules are posted late? Late schedules demonstrates that timeliness isn't all that important. Equally important, late schedules wreak havoc with your staff's lives. Not allowing your team the time to plan or to have expectations will lead to dissatisfied people -- and that leads to costly turnover.

# DO THEY KNOW YOUR TEAM?

This is a nuance, but as you will learn, knowing your team is a crucial aspect of successful schedule writing. One exercise is to have each of your managers grade your staff (A, B, C) and compare their insight to yours. If they don't agree, challenge them to convince you why a team member is not who you believe them to be.

This will both instruct them in how to professionally evaluate staff performance, but will also ensure you that they know your team. This may reveal the person is well versed in the staff strengths and weaknesses.

However, it may also show the manager to have terrible bias issues that could cause real problems, which leads to our next qualification.

# ARE THEY FAIR-MINDED?

As long as we have human beings working in our restaurants, there will be bias issues. This can be a serious problem if your scheduling manager can't separate themselves from the biases they bring to your building.

So often, the schedule is used as a method for punishing employees or as a way to give favors to staff that the scheduling manager prefers. If you want peace in your building, you need to assess the power of the scheduler's biases and regularly follow up to ensure they remain fair. The schedule is not the place to be reactive.

In fact, schedules by their nature are a proactive approach to managing the business. Holding the scheduler to a standard of fairness will send the message to your team that performance matters -- not who's the manager's favorite.

# DO THEY UNDERSTAND THE NUMBERS?

Every schedule you post is a mini-budget. They allocate labor based on projections and how you want to spend your revenue.

Again, here is a place where digital schedules help enormously. They build in labor cost calculations in real time and accommodate sales projections, which greatly facilitate the task. That being said, your scheduler still needs a full understanding of how those numbers impact your budget.

Are they regularly over on daily labor results? If so, they are not demonstrating they understand the importance of managing labor or disciplined enough to achieve the desired labor results. It means they likely aren't ready to write the schedule.

# HOW DO THEY HANDLE POWER?

**There is no greater power for a manager than writing the schedule. Therefore, you have to consider how your scheduler will respond to that power.**

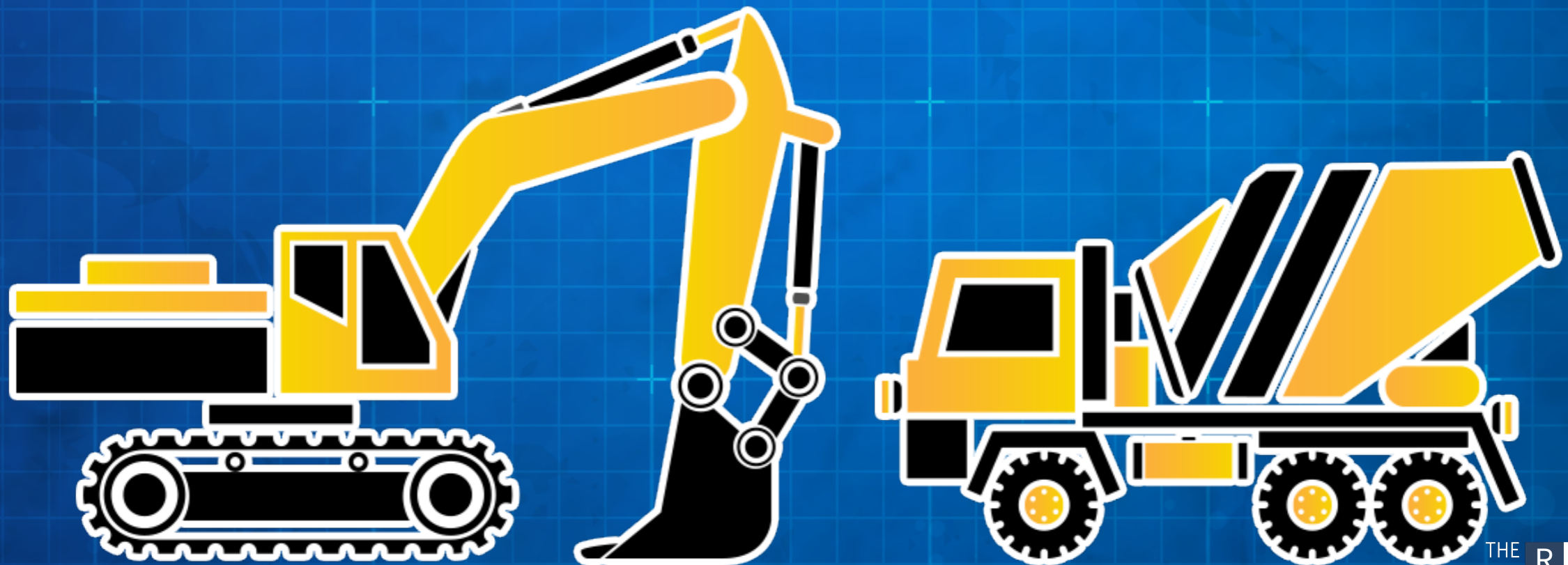
**Observe how they interact with the people they have influence over. Are they rude to vendors? Do they speak condescendingly to staff? These and other behaviors are signals they aren't mature enough to take over the most influential task in your business.**

**Scheduling can also be a humbling experience that gives the most power-driven manager perspective. Either way, knowing in advance the character of your scheduler ensures you won't be surprised by how they respond to their new found power.**

**Of course, you don't always have the flexibility to be thorough in choosing your scheduler.**

**You can, however, use these questions to analyze their performance and give them feedback that will improve their performance.**

**In the end, you cannot minimize the influence and impact that scheduling has on your operation. Be disciplined and thorough as you manage the person that is managing your schedule.**



# 4 SCHEDULING HACKS

THEY JUST MAKE YOUR LIFE EASIER.

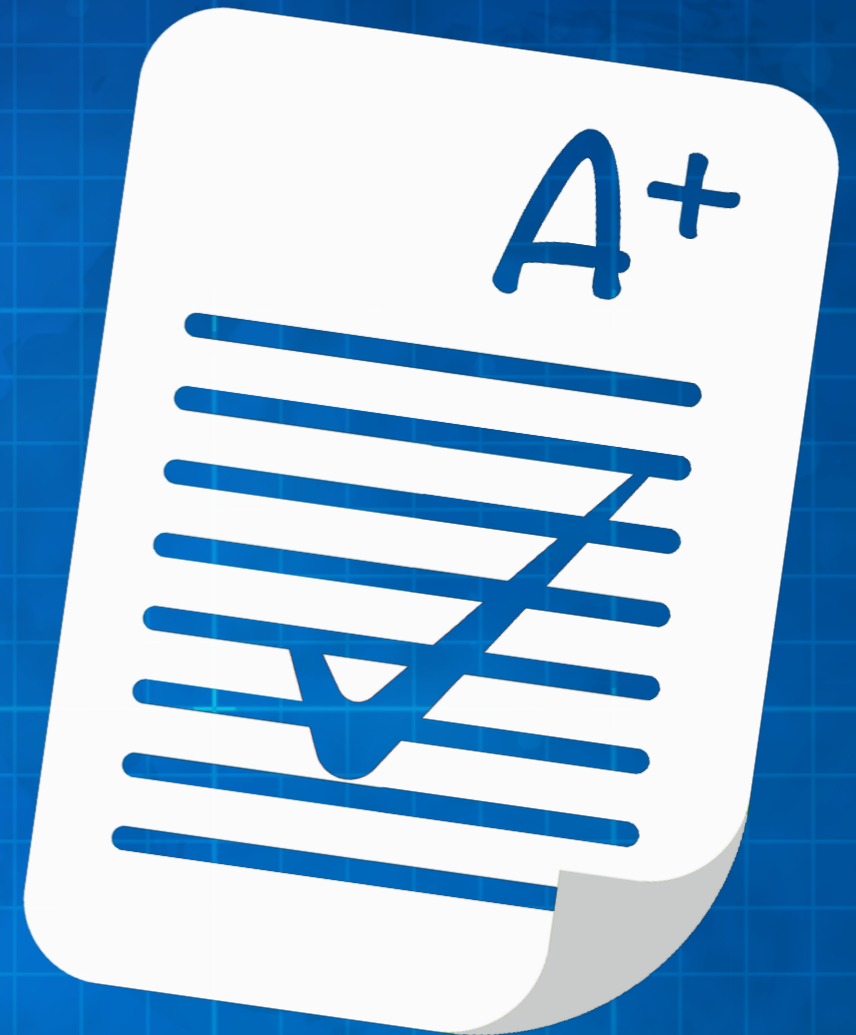
# HACK #1: GRADE 'EM!

Staff chemistry is a recipe like any other in our industry. Mixing people of different skills, temperaments and experience can go great or be a disaster.

It takes a solid knowledge of your team to properly tune the schedule for your optimal performance. That starts by taking the time to honestly assess the quality of your various staff members.

Of course, this isn't a perfect process and will take some refining over time, but the outcomes make the effort rational.

Start by asking your managers to grade your staff members based on their observations. Then gather metrics about your staff -- items like check average or dwell times. Now it's time to grade them on their individual performance. Your call here, but likely a simple A, B, C rating system will suffice.



**Think of yourself like a basketball coach with 20 players trying to find the perfect lineup. Armed with a complete and comprehensive assessment, you can now assemble them onto schedules.**

**Here is where you begin tuning.**

**Look at the schedule grade mix and track performance based on that mix. If you find having two 'A' staff members working gains a significant result improvement, than you know that is the minimum level you need to schedule.**

**Of course, this can be an administrative headache, but by using digital scheduling you can get that data more easily and use it to your advantage.**



# HACK #2: SCHEDULE @ :15 & :45

How often have you looked in the server station around 5pm and seen three or four of your staff chatting and waiting around for the rush to begin? We'd wager too often.

Scheduling can relieve that pain. Too many of us schedule servers at the top of the hour. If you have six servers scheduled, why not have their shift starts staggered? Since, your POS tells you exactly what time you have been traditionally busy, you can arrange the schedule to reflect that.

You will be shocked by the impact this tactic has on your labor expenses. You can use the same approach for BoH and FoH. Digital scheduling that is integrated with your POS makes this even easier to manage. As you write the schedule you can access the sales data you need to make intelligent choices about schedule times.

# HACK #3: LOOK AT YOUR CALENDAR!

We know! It sounds dumb, but you would be surprised how often a schedule goes amiss by something as simple as, “I didn’t know that was today!”

The most obvious examples are in sports-themed venues. The national championship game or a local televised event could greatly boost traffic. Knowing what’s on for sports – like the Masters Golf Tournament is on in April – means you’ll be prepared for increased traffic.

However, this isn’t limited to sports-themed operators. In fact, sports can have a similar impact on any operator that has a TV. The same is true non-sporting events.



**Look at what happened the year before and what is scheduled for the current period. Be proactive. Add or cut labor as necessary.**

**Scheduling is a nuanced and complicated process. It requires research and thoughtfulness. So don't be caught unprepared.**

# HACK #4: HEAD FOR THE CLOUD

If you are still puttering around with spreadsheets or using the clipboard method, you're costing yourself money.

While there is always an expense for services like digital online scheduling, their usefulness and utility will easily cover that expense with efficiencies in labor cost and better employee relations.

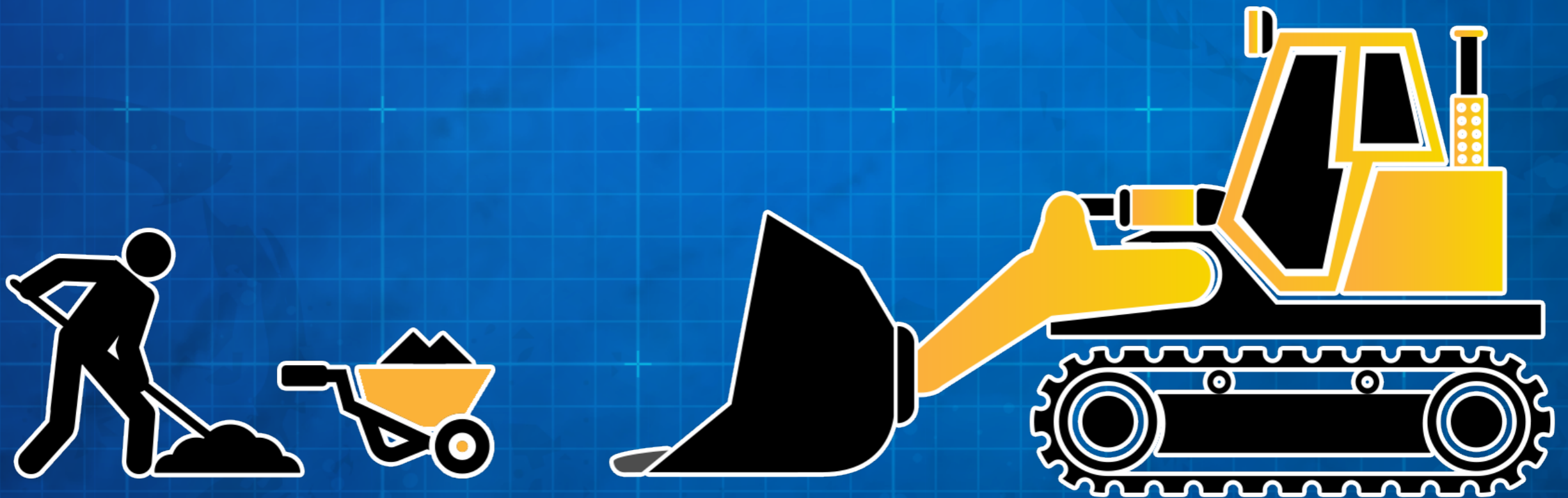
With a service like HotSchedules, gone are little slips of paper with "time off" requests. Gone are those absurd conversations surrounding shift coverage. Gone are spreadsheets with broken formulas to calculate labor cost on the schedule.



**Instead you have a centralized system that facilitates shift coverage via an app or web interface, easily accessed information about previous schedules and accurate real-time calculations of labor schedule versus performance.**

**You will lower your labor cost, improve staff morale and save a lot of time. It's an easy decision when you calculate the savings against the cost of service.**

**So, what are you waiting for?**



VISIT US!

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