



Workforce management

Buyer's Guide



What are the essentials when **implementing** workforce management?

The decision to opt for workforce management software must be carefully considered. Before the software is rolled out at your company, you will need to find answers to decisive questions, find the right provider and determine the right functionalities.

We will be at your side on the way and have listed vital questions and the appropriate answers in this document, which will accompany you when taking the first project steps.

We are also on hand to advise you on further steps in charting your course to a new workforce management system. By way of our detailed sample load specification, we will clarify each and every requirement with you in dialog or present special use cases with a live software demo.

You should also be well aware that a workforce management project will not depend only on the software, but also entails altering processes as well as engaging in change management and project

work within the company. You should definitely take this into account when choosing a provider. Does the software implementation also consider organizational change and does the provider apply certified project management methods (IPMA, Prince2, Prince2 Agile, SCRUM)?

Does a provider's software enable you to work efficiently with agile project management approaches? Especially in project environments with frequently changing framework conditions (e.g. short-term changes to company agreements or planning regulations), the software's ability to react quickly and the flexibility represents a decisive success factor. An iterative project approach, combined with software that can be adapted to customer-specific requirements through parameterization, proves its worth here.

The right provider

How long has the provider been active in the workforce management market?

The experience a provider commands is decisive for the expertise. The longer a company has been operating on the market, the more in-depth its specialist knowledge and expertise in the individual sectors will be.

How many employees does the company have worldwide and how many are involved in product development?

The number of employees and the development of the employee pool provide information on company's growth trajectory. The number of employees involved in the further development of the product shows how future-proof the software is.

How have sales developed over the past ten years?

It is not only worthwhile to look at one year's sales, but also at the sales trend and the underlying business model. Are sales trends steadily on the rise? Is there sustainable growth in line with the business model?

How have earnings developed over the past ten years?

The development of the operating result shows the profitability of the provider. How much profit is generated? What does the company's liquidity look like?

Is the company dependent on investors?

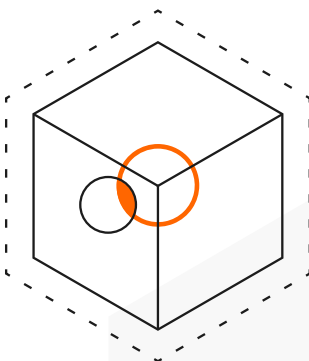
If the provider is owner-managed, potential customers can be sure that the company has a clear vision and direction. In companies managed by several investors, there is often a risk of business friction.

What does the provider's product portfolio look like?

Essentially, this is the question as to which products the provider sells and whether it positions itself as a clearly defined specialist in workforce management or whether other business areas are also offered.

How transparent is the company?

If the provider is stock market listed, the financial situation will be fully transparent. This creates trust among customers and interested parties.



How high is the annual investment in research & development?

The further development trajectory of software products is a vital aspect. Consequently, it is important to clarify the extent to which a provider invests in the development of its products in order to keep its finger on the technology pulse of the times.

Which partners does the provider work with?

A provider with strong partners at its side is an even stronger player. It is crucial who the company relies on in terms of hosting cloud applications, implementation partners or partnerships for connected software, for example.

How many customers place their trust in the provider?

A sound and satisfied customer base is the best proof of a reliable provider. Therefore, the number of customers, the growth of the customer base and also the quality of the customers should be well considered.

Are there any reference customers?

Satisfied customers are proud of their achievements, which is why reference customers are a decisive criterion. This not only demonstrates satisfaction, but also the measure of trust placed in the provider.

Are reference customers available for visits?

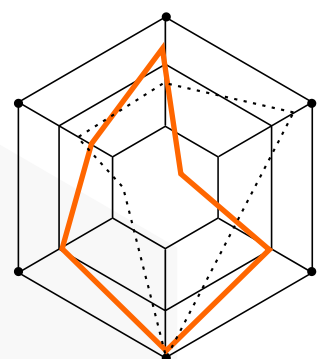
Ultimately, it is vital to clarify whether reference customers are also available for interested parties to visit in order to see the software in actual use and experience the added value firsthand.

Does the provider have its own team of experts dealing with cloud solution issues?

If a company is offering cloud solutions for operating workforce management solutions, the provider should have its own team of experts who deal with the operation and improvement of the cloud offerings on a daily basis.

There are some important points to assess when looking at workforce management software providers: Consider how long the provider has been active in the market. In addition, don't just look at pure sales figures, but analyze the sales and earnings development of the past years or even decades in detail. Moreover, it should also be ascertained how much money flows into the fur-

ther development of the software. Proceeding in this manner, you will be able to identify future-proof solutions and, above all, reliable partners. This is the only way to ascertain a reliable and good business model. Do not hesitate to ask for reference customers. A reliable provider will offer to carry out a reference customer visit.



Compliance

Information

Recommendation

Is the software compliant in terms of data security?



Both the German Federal Data Protection Act (BDSG) and the General Data Protection Regulation (GDPR) stipulate how personal employee data must be collected, processed and protected.

Can data security within the software be controlled via access concepts?

The security of strictly protected personal data will be more stringent if the software features authorization concepts. This means that only those persons can view and/or edit the data who are explicitly authorized to do so.

Make sure that data protection is a top priority issue for providers of workforce management software. Corresponding functionalities in the software should be available in the standard version. This prevents data protection violations from occurring in the first place.

Does the solution map labor and employment laws in and outside Germany?

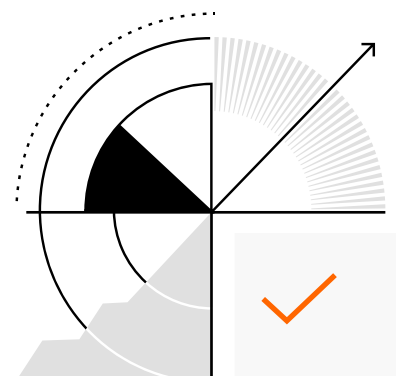
Storing labor and employment laws in the software is the foundation for correct payroll accounting and also a prerequisite for sound duty scheduling.

Legal regulations must be stored as standard so as to enable the most extensive possible automation. Companies with branches abroad or pursuing internationalization strategies must ensure that a provider is also able to map legal regulations outside of Germany.

Can the standard version of the software map collective agreements?

For many companies, this represents the sound foundation for correct accounting and ensuring that working hours are organized in accordance with rules and regulations. This calls for a reliable partner who can map the complex regulations.

It should be possible to map collective agreements with the standard configuration and via parameterization. In this way, you will benefit from the provider's experience and the correct implementation of collectively agreed regulations.



Is it possible to implement work contracts and/or temporary work with the software?

This type of contract is not uncommon, especially in highly volatile markets such as production. A provider should therefore definitely be able to map this use case.

It should be possible to map work contracts or temporary work via standard configuration and parameterization.

Can the software map company agreements?

In addition to statutory and collective agreements, it is important that software can also map company agreements. It is crucial that the provider dialogs with the works council in advance and actively addresses relevant questions as well as open points for discussion.

The introduction of important software products often fails due to a lack of approval by works councils. Therefore, it is well to ascertain that a provider has successfully implemented works agreements and has also interacted with works councils. In case of doubt, this protects the investments that have already been committed to a project.

To what extent can the system map individual agreements?

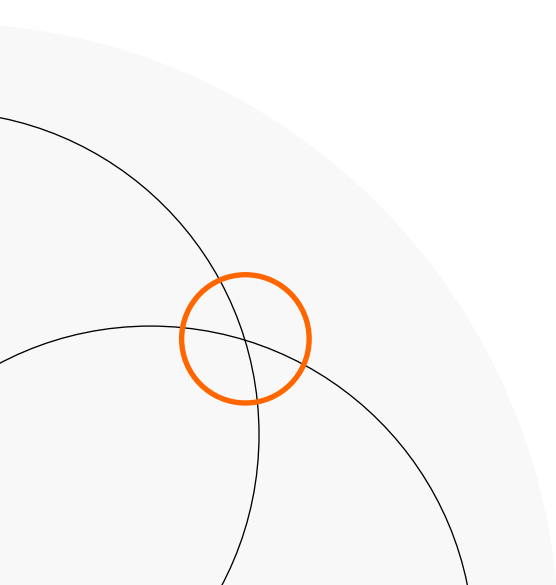
Individual agreements are concluded between an individual employee and the employer. In large companies, such agreements can get out of hand and make managing them a complex task.

Software that can be parameterized offers the greatest possible freedom in mapping the individual working time models and general agreements that are in place between employers and employees.

Is compliance with all regulations monitored automatically?

Exceeding the 10-hour limit, violations of rest periods and many other regulations are prescribed by law. In order to ensure compliance and avoid penalties, it is important to have transparency on working hours and relevant issues. It is almost impossible, however, to check guidelines manually.

Automatic monitoring for compliance with regulations is a must-have feature of future-proof workforce management software.



Is the software capable of managing qualifications?

First aiders, fire safety officers or, in case of doubt, plant fire departments – employees with certain qualifications must always be on duty. The management of these qualifications is complex, in addition to being associated with high administrative costs.

Be sure that workforce management software can map qualifications and also check them automatically. This is a decisive factor for flexible and cost-optimized personnel deployment.

Is the software capable of implementing the ECJ ruling and the BAG ruling?

At present, the legal implementation is not yet clear, but the European Court of Justice and the Federal Labor Court have ruled that employers must create a reliable, objective and accessible system for recording daily working hours or that time recording is mandatory.

Implementing the ECJ ruling is a mandatory task for workforce management software. Thanks to digital time recording, legally compliant implementation can be ensured.

Can the standard version of the software deal with industry-specific regulations such as PPP-RL, PPR 2.0 or the collective agreement for retail be implemented?

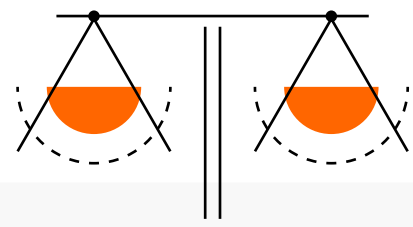
Companies are obligated to implement sector-specific regulations on working hours and staffing levels. Appropriate tools are required to ensure efficient implementation.

Ask whether a provider has the necessary sector expertise to implement specific regulations of an industry sector in detail and as standard solution, as required by law. This prevents infringements and protects companies from incurring fines.

Can short-term requirements be met?

The coronavirus pandemic has shown how important it is for companies to be able to react to external circumstances – short notice and spontaneously. Specifications for 3G status or the implementation of short-time working had to be integrated into time and attendance management.

The software must be parameterizable so that short term and spontaneous requirements can be met with little effort or programming. For power users in a company, this should also be possible without the involvement of the provider's software experts.



Technology

To what extent is the solution future viable and sustainable?

In a constantly changing world, software technology must be future-proof. A solution provider must be able to master technology leaps (such as AS400, JavaScript) by way of the secure and successful migration of all existing customers. Advanced, leading edge technologies should have no impact on the existing product.

Be sure to opt for a provider that explicitly offers cloud solutions. This increases investment security with a view to the future and guarantees a solution that is at the most advanced, leading edge of technology.

Can third-party systems such as hospital information systems, production planning systems or cash register systems be linked up? Are there also certified interfaces in place, for example to SAP SuccessFactors?

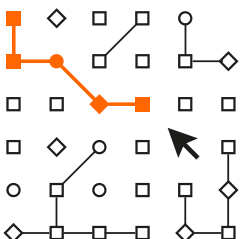
If the provider is an absolute specialist in workforce management, it will be necessary to connect additional systems. The software must therefore have open interfaces wherever possible in order to ensure the greatest possible flexibility in terms of integration into HR system landscapes. Certified interfaces have the advantage that they undergo a technical quality check by independent auditors (certification centers). Moreover, certified interfaces undergo maintenance measures.

In order to be able to plan in a demand-optimized manner, it is essential that external systems are integrated; in other words, that a continuous system landscape is created. This increases the reliability that the interface or system integration will always function. In addition, a certified interface speeds up the implementation of system integration.

Is the software programmed or parameterized?

Here, the main question is whether the provider offers a fully programmed product or a standardized package that can still be adapted to the company's needs by way of customizing. In live operation, by way of parameterization, adjustments to the system can also be made conveniently and ad-hoc, whereas with purely programmed systems dependence on the help of the provider is always an aspect.

In the best case scenario, the provider offers process-related requirements workshops defining specific needs. In such cases, modular software is crucial. This means that the solution can continue to grow with a company's future requirements.



What hardware can be connected?

In this context, the question is whether the provider can connect hardware regardless of brands and vendors and is therefore flexible, or whether the provider is restricted to certain hardware components.

In the best case scenario, existing hardware can be integrated into the software. This protects the investments that have already been committed.

Does the software make all data available in real time?

Data relating to working hours should not have to be explicitly called up or transferred, but should be available in real time and at all times. This guarantees that work is always based on up-to-date and correct data.

Working on one single platform ensures real time data availability. This not only increases transparency, but also the quality of the data in terms of evaluations, etc.

Can the software only be operated on-premises or also in the cloud?

The question of a software's operating mode should play an important role in a project. Does a company want to operate the solution on its own servers or in the cloud?

If a company wants to have future-proof software in place, cloud operation is essential. This creates the precondition for consistently maintain a position on the cutting edge of technology.

Does the provider have a dedicated cloud product and what advantages does it offer?

It is important to verify whether the provider offers a dedicated cloud product. Is the software provided in the meaning of a best-of-breed approach and functionally enriched with microservices?

Be sure to opt for a company that is clearly focused on cloud products and is constantly developing its solutions to this end. Have a provider explain their cloud strategy to you.

Operation

Which provider hosts the software?

If the provider offers cloud-based solutions, the question arises as to which provider hosts the software. Ideally, the provider will be teamed up with hyperscalers in order to not only achieve the necessary performance, but also a technological edge.

The almost unlimited infrastructure resources of hyperscalers, such as Microsoft or Amazon, ensure smooth, glitch-free software performance, stability and flexibility. A provider should host its software with a hyperscaler.

Is a test system provided?

A test system allows users to try our new features in a secure environment before working with real data.

There should always be the option of operating a test system.

Does the provider operate its own service hotline?

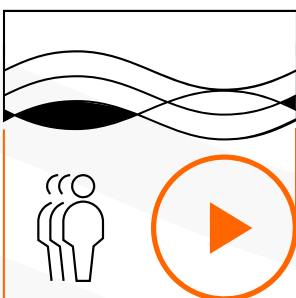
A dedicated service hotline stands for expertise and reliability in helping customers promptly and reliably in the event of problems.

The provider's hotline staff should be familiar with the software themselves in order to provide immediate assistance. Ideally, the hotline should be located in Germany.

Does the provider issue regular updates?

The frequency with which the provider makes innovations available also documents the innovative strengths of a company.

In order to remain functionally up to date, the software should be continuously updated and upgraded with the latest product developments.



Employee Experience

Does the provider offer self-service?

Self-service is the perfect tool to give employees the opportunity to intervene independently in the management of their working time.

Self-service must be simple and intuitive to use. Employees must be able to record all their data at a glance and navigate by way of clear and concise dialogs.

Is this self-service available as a web application and as an app?

Employees can access self-service either via the browser or by way of an app that can be easily downloaded from the AppStore or from Google Play.

In a flexible and mobile world - both in private life and in business - the motto must be: mobile first and foremost. New generations of employees are quite simply demanding this. A future-proof provider must offer an app for employee integration.

Do the web application and app have the same UX and UI?

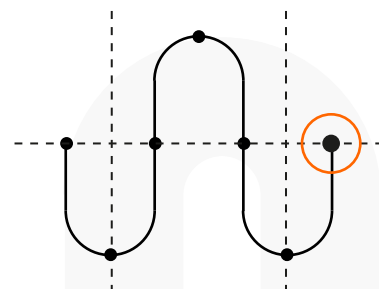
The manner in which self-service and a corresponding app are structured has a major impact - not only on functionality, but above all on user satisfaction.

The desktop version and mobile app must merge to form one single world. This not only enhances the acceptance of the solution, but also makes it easier and more convenient.

Can vacations be requested by way of workflow?

Digital workflows represent the foundation for digitizing processes and establishing efficient absence management. Employees can apply for leave quickly and easily via self-service.

The mapping of digital workflows within the software must be an available feature. It is also important that workflows can be stored at multiple levels and approved automatically.



Are employees able to view their balances at any time?

Employees know exactly whether they have accumulated minus hours or how much overtime has been added to their time account. Consequently, it is important that data is available in real time.

Transparency for employees is noticeably increased when they can keep an eye on their working hours at all times. This is mandatory for ensuring a modern employee experience.

Is it possible to hand in preferential shifts or swap shifts digitally?

In advance of the duty roster, employees can submit their preferences for shifts on which they would like to work. Employees can swap shifts independently using a digital shift exchange – entirely managed by way of digital workflows.

Optimal employee experiences are above all achieved when the greatest possible flexibility in terms of working hours is enabled. Consequently, a provider should offer this functionality. What's more, administrative expenses are also reduced.

Are legal regulations automatically checked in the event of a shift swap?

If a shift swap takes place between two employees, it must be ascertained that all legal regulations are complied with. This is particularly relevant if confirmation is no longer required from a third party and the exchange takes place directly between employees.

Automatic monitoring for compliance with regulations is a must-have feature of future-proof workforce management software.

Does self-service make reports directly available?

If employees want to create reports on individual working time parameters, they will benefit from the greatest possible transparency regarding their individual working time.

When selecting a provider, demand that reports can be created independently by way of self-service. This will significantly increase the quality of the digital employee experience.



Planning

Are personnel requirements displayed in the planning screen?

The number of employees required to cover the corresponding demand is crucial in order to ensure cost efficient and flexible staff deployment.

Ideally, personnel requirements should be visible in the planning screen. Deviations from the target can be clearly visualized by way of a traffic light system.

Are vacations and requested services automatically transferred to the planning screen?

If absences, such as vacations, but also requested preferential working times are displayed directly in the planning screen, planning staff will enjoy significantly less effort and thereby also avoid planning.

A standardized platform that makes all the data available in real time is the prerequisite for a smooth planning process entailing as little effort as possible and optimum planning quality.

Are available capacities displayed in the planning?

Long-term capacity planning enables planners to harmonize the available capacities with the required demand over a longer period of time. This also ensures efficient annual vacation planning.

A powerful platform providing all the relevant data in real time as well as interfaces to the necessary systems, such as production planning systems, must be available in order to be able to plan strategically and optimally.

Does planning take qualifications automatically into account?

In order to achieve efficient staff deployment, it is essential that employee qualifications are automatically taken into account.

Qualifications should be managed in the same system in which duty scheduling is performed and working hours are recorded. A standardized database is the key to saving time and reducing errors. At the same time, planning flexibility is enhanced.

Is there an automatic warning system in place for violations of working time guidelines?

Compliance with working time guidelines must be guaranteed in every company. All the relevant regulations should therefore be monitored automatically during the planning process. This cannot be performed manually.

Be sure that a workforce management system is capable of mapping and automatically monitoring all relevant laws, regulations, tariffs, etc. This prevents rule violations and, in case of doubt, incurring costly fines.

Are employee balances displayed during planning?

Who can be scheduled and with what intensity of hours? Overtime and minus hours must be taken into account so that working time accounts do not extend too far into negative terrain, but also not into overtime. Planning staff must take these and other parameters into account during the planning process.

A standardized system is called for that provides all the relevant planning data in real time. This ensures that the information is displayed in the planning screen at the time of duty scheduling.

Are balance changes displayed in real time during the planning process?

Every duty roster incurs changes in the employees' time accounts. This means that planners not only have to staff shifts and services in an optimal manner, but also always keep in mind how employees' working time accounts will look in terms of forecasts.

A future-proof workforce management solution must make changes in balances transparent at the time of planning. This provides the planner with a direct comparison of the actual status before and after duty scheduling. A traffic light system indicates when threshold values have been exceeded.

Is it possible to search for available and suitable employees directly in the planning screen in the event of illness?

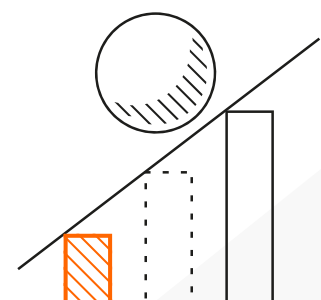
Employees taking sick leave can be a daily occurrence. Finding replacements quickly is critical to success so that shifts can be staffed in line with requirements.

The search for suitable replacement staff for sick employees must be performed directly from the planning screen. The software must suggest available and suitable candidates, taking all the relevant regulations and qualifications into account.

Is the solution an integrated system for time management including self-services and workforce scheduling?

An integrated system means that the relevant data from time management, self-services and workforce scheduling are all managed in one and the same database. This means that they are available centrally for the entire application and can be displayed and evaluated consistently at all relevant points. Example: If planning data is relevant for correct time evaluation (e.g. loss of earnings principle in the event of illness), this is decisive in achieving the most efficient processes possible.

An integrated system that processes data on a single platform will allow you to achieve the greatest added value through digital workforce management.



Time recording

Which devices can be used to record working times?

A modern time recording system must meet the demands of a mobile and flexible workforce. Times and activities must be recorded where they occur – also when on the move. There is a wide range of options to choose from: Terminals, PCs, POS systems or mobile by way of apps.

The provider of the workforce management software must offer an app for mobile time recording in order to keep up with the modern requirements of young employee generations.

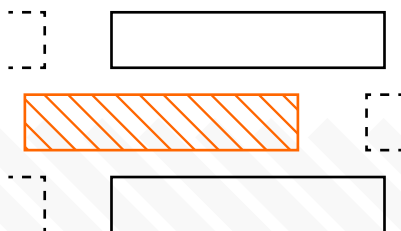
Can project times be explicitly recorded?

Project time recording is used to retroactively allocate hours worked to specific projects, for example at the end of the day.

A modern workforce management solution can break down and process working times precisely and rapidly into orders, projects, customers, products, activities or other freely definable dimensions.

Can you actively book items to cost centers?

Cost center management is opted for where employees make time bookings exactly at the time when they start a job or change their previous employment.



Time management



Can individual working time models be stored?

This is a crucial question in providing the workforce with the greatest possible flexibility. Working time models not only have to be devised and designed, but also systematically mapped so that working hours are correctly accounted for at the end of the month.

Workforce management software must be as flexible as possible in order to be able to map working time models. Consequently, parameterization is a prerequisite.

Can time data be managed and evaluated automatically?

If all rules relating to working time (models, laws, collective agreements, etc.) are stored in the software, it must be able to evaluate the recorded data automatically in order to reduce input and effort on the one hand, but also to enable correct processing of the working time data on the other.

Ideally, the data should be recorded and processed in one single system. This not only guarantees the highest data quality and up-to-date status, but also the most extensive possible degree of automation.

Can evaluated times be automatically transferred to wage & salary accounting?

Evaluated working times must be transferred to wage & salary accounting so that employees also receive their salaries. Manual processes increase the error rate and the risk of errors.

Workforce management software must feature interfaces that enable connections to all common and major providers.

Is it possible to manage master data historically?

Master data changes at regular intervals. Consequently, it is advantageous if such data can be created as variants and can therefore be retro-calculated. This is also crucial in order to be able to adequately take changed master data (e.g. employee department changes) into account in personnel planning.

Make sure that a workforce management solution allows the management of master data with complete retroactive accounting and variant capability. In addition, dialogs should be freely definable and restrictable for users via authorization concepts.

Can time corrections be applied for and processed digitally?

Forgetting to clock in. Forgetting to clock out. Or employees forget to record their time when they go on a break or return from a break. Corrections of time data waste a tremendous amount of time in many companies and HR departments.

Future proof software must be capable of mapping the time correction process completely digitally by way of workflows. This saves a tremendous amount of resources and creates scope for value-adding activities.

HR Analytics

Can evaluations be generated?

Does the software provide the option of creating evaluations from the available data in real time? In this way, employees and managers to gain valuable insights into working hours.

Is it possible to create and send reports automatically?

If reports and evaluations can not only be generated and sent on request, but also automatically, this increases the options and scope for creating transparency throughout the company.

Can evaluations be individualized?

In many cases it is necessary or desirable to adapt evaluations precisely to the requirements of a company.

Can BI tools be linked up to the WFM solution?

If the demands made on standard evaluations are no longer sufficient, it may be necessary to connect a BI tool. Workforce management analyses are possible in even greater detail in such a system.

Is it possible to analyze the comparison between forecast and employee deployment?

If this use case can be analyzed, potential improvements for the future can be identified and planning can become even more cost efficient.

Can data also be called up rapidly and spontaneously in the system?

Flexible evaluations become relevant when unforeseen actions, decisions or regulations enter the picture. Ad hoc evaluations help you in deciding which data you want to evaluate and assist in adapting data your individual needs by way of filter, sorting, calculation and grouping options.

Workforce management software should combine time management and workforce scheduling in one single system in order to provide consistent data at all times. The ability to work with real-time data facilitates creating evaluations and also increases the quality of evaluated data, for example with regard to sickness rates, vacation frequencies or

the comparison between the analyzed forecast and actual employee deployment. If the workforce management software can be parameterized, evaluations can be individualized quickly and easily. In addition, it is essential that the software features interfaces enabling common BI tools to be linked up to the system.

The benefits and added value of workforce management

Workforce management means deploying the right employees with the right qualifications in the right place at the right time, while taking costs, individual needs and regulatory requirements into account. It makes company processes more efficient, flexible and transparent and creates the conditions for an employee-centered and legally compliant working environment.

Digital workforce management combines time and attendance management and data-based workforce scheduling. Framed by HR analytics functionalities – representing the foundation for business decisions – and modern self services efficiently integrating the entire workforce into the organization of working time.

This is based on a platform that provides data in real time, interfaces to enable connection to other systems, offers deployment models such as on-premise or in the cloud, while enabling the highest possible degree of standardization in the software so that individualizations can be made by way of parameterization and no individual programming is necessary.

Thanks to such systems, companies are able to react flexibly to volatility, make processes more efficient, improve the employee experience and digitize one of the company's most vital resources: valuable working time. And all this while taking the full range of compliance requirements into account. Nationally, internationally, worldwide!

