Shift patterns – what are the options and how to implement them successfully

The creation of shift patterns to meet customer demand by every 15 minutes of the day is hard enough. Add into that restricted contracts, working time directives, family friendly legislation and unions, and you can see why the job of a contact centre scheduler is not as straightforward as it may at first appear. There are after all people on the end of those shifts and people have needs and requirements that must be met alongside those of the business and the customer.

The Professional Planning Forum recently conducted research which looked at the different ways that flexibility could be created. The research found 18 different options, all of which are being used in contact centres across the UK. These options are effectively the building blocks that a scheduler can use to match demand. The role of the contact centre scheduler or planner is to create both shift patterns and a further set of options to fill any gaps, or remove any over staffing. Overtime, time banking, unpaid leave and holidays are common ways to manipulate staffing numbers to match customer demand, but there are some more radical approaches being used too.

Some of these options are not specifically shift patterns but if deployed they allow for more creative shifts to be implemented. For example home workers are ideal for working split shifts: 3-4 hours covering the morning peak; a few hours off; back in for the afternoon and evening peak for a further 3-4 hours.

The creation of good shift patterns is best described as a jigsaw puzzle. In order to match customer demand and the needs of the employees, different jigsaw pieces will be required. The use of one contract or shift type may match part of the customer demand and appeal to a certain group of employees, but leave a gap that needs to be filled by a different contract or shift type. The most obvious example of this is the use of full time and part time contracts. i.e. Part time contracts working early mornings, evenings or weekends, complementing the full time contracts working traditional business hours.

The challenge faced by the scheduler or planner is that they are not the ones making the decision on which scheduling options or contract types are available to them. The decision on scheduling strategy and therefore on contract types for recruitment is one that needs to be made by the management team. In order to make an informed decision there are a number of questions that need to be answered:

- How much flexibility does the business need?
- How are employee needs balanced with those of the business?
- What scheduling strategy is needed to achieve strategic business goals?

“Don’t just fix the problems of today, what if the business shifts – you need a buffer of flexibility to deal with it.”

Adrian Hawes, Resource Optimisation Manager, Aviva UKGI

As James Mitton Director of Planning and Systems at Shop Direct Group put it “Flexibility is a term that covers a multitude of sins, what the business wants whilst forgetting staff needs, what the business thinks it wants as a solution. In an increasingly cost conscious world, where customers demand better, faster service, there has never been a more important time for planning teams to step change their communication – to understand the flexibility problem the business is really trying to fix, to understand what the staff at the coal-face really want and are currently experiencing.”

The management team need support from the top in answering these questions and perhaps most importantly they need engagement from the bottom. The most successful shift reviews are aligned to the business goals and have engagement, normally through focus groups, with front line staff. This engagement is a vital step towards creating schedules that work for employees and providing employees with the understanding of customer needs.

Knowing what you are trying to achieve is one thing, but how do you overcome some of the challenges already mentioned.

Restricted contracts – In order to introduce changes to shifts that fall outside of the current contract many centres offer these on a volunteer basis rather than go through the laborious task of changing contracts and formal consultation. If the shift is attractive to a certain lifestyle then people will volunteer without any need for an incentive. There certainly should be no need to offer a financial incentive to move from one pattern to another. Often non financial incentives are used such as additional days leave, access to time banking, duvet days and shift slides. Running a pilot is also a good way to encourage change. Committing for a 3 month period is easier if you know that at the end of that period, you can if you wish, go...
back to your old shift pattern. It is really about having faith that your new shifts are better for the employees than the old ones. If they have a work-life balance then people will volunteer to change if the benefits are communicated effectively.

Family friendly legislation – This legislation is there to help carers and parents deal with the specific challenges that face them. It is certainly not something to be ignored by any organisation. The planning team need to work closely with HR to ensure they understand the legislation and agree a robust process for dealing with each family friendly request. Fairness and transparency are extremely important. The legislation does not mean that every request has to be accepted. The business can reject a request providing it can justify why the business is unable to accommodate the request. Rejecting requests for most companies can be avoided, but a negotiation on what is possible is perfectly acceptable. It seems reasonable that if you are requesting a family friendly shift change you would request the best possible shift for your individual needs, this does not mean it’s the only time you can work, but is the time that given a choice you would ideally want to work. As a planning team working with HR, it is perhaps more relevant to understand when someone can’t work, rather than when they would like to work. Negotiating on family friendly requests often produces a shift that is fair to both the employee and the business.

Unions – In order for the Union to understand the specific challenges faced by a planning team, why not bring the representative in for a day in the life of planning. Let them understand the challenges faced on forecasting customer demand and then trying to match that demand with a set of shifts. This day doesn’t need to be about raising new ideas, it is simple about education. It is unrealistic to expect the union to understand the role of planning unless we teach them something about it. This knowledge will mean that when negotiations on shifts start the union has a basic understanding of the challenges being faced by the scheduler and the business.

In summary great schedules will look and feel different for each business. There is not a one size fits all answer, however the scheduling solution for each business should have a number of things in common:

- Future proof - They are fit for purpose today, but retain enough flexibility to move in line with changes in customer demand.
- Strategically aligned - They meet the strategic business goals as closely as possible with the level of resources available.
- Work-life balance – They provide a number of options which are attractive to different demographics and have considered how shorter notice flexibility will be managed.

Steve Woosley
Membership Director,
Professional Planning Forum

The Professional Planning Forum is the independent industry body, promoting best practice and professionalism in contact centre planning. Our members benefit from our benchmark research, specialist training, accreditation, bespoke support, events and networking opportunities. Our aim is to help every centre develop confident skilled analysts, planners and managers in order to improve the customer experience.

**The Flexibility Toolkit**

1. Homeworking
2. Student working
3. Term time
4. Part time
5. Job share
6. Second job
7. Fixed shifts
8. Rotational patterns
9. Trade off shifts
10. Annualised hours
11. Flexi-time
12. Time banking
13. Unpaid leave
14. Overtime
15. Contractual overtime
16. Zero-hours contracts
17. On call
18. Relief/short-notice shifts

*developed by the Professional Planning Forum*

For more information

To see the detailed flexibility tool kit developed by the Professional Planning Forum, visit [http://ppf.bz/im9ysb](http://ppf.bz/im9ysb)