



Workforce Management

Plan for the Future / Manage on the Moment



Workforce Management

Retail shoppers today are much more demanding, savvy and price conscious than ever before. They have a wealth of information at their fingertips and can easily examine your store merchandise and then buy it online for less. Converting this new consumer to a buyer is much more difficult, and therefore requires a more skilled, better trained and technology equipped workforce. Supporting this more talented workforce requires a new breed of workforce management solutions designed specifically for retail that make your workforce more efficient while at the same time making them more effective.

Yet no matter how well you plan and equip your workforce, things happen. Associates become ill or don't report for work, traffic flows vary from projections, unforeseen events occur. Your workforce management solution must provide tools to alert managers to these variances as they occur and enable them to take immediate corrective actions to optimize coverage, service and conversion rates.

JDA® Workforce Management uniquely provides retailers with advanced planning, budgeting and scheduling capabilities combined with role-based tools to enable managers to quickly react to everyday realities. This dual “plan for the future/manage on the moment” solution is backed by JDA's decades of experience in retail workforce management and our work with leading retailers around the world. Furthermore, JDA Workforce Management is an integral part of a broad supply chain and retail solution offering that helps retailers reduce costs, increase revenue and better serve their customers.

Planning Your Labor Investment

Store associates have historically been viewed as an expense to be minimized. While it is still important to not over-staff or waste resources, today's highly competitive omni-channel environment requires retailers to invest in the right number of associates with the right skills to drive conversion rates and profits. Done correctly, your workforce becomes not an expense, but a competitive differentiator.

Developing this kind of workforce requires long-term planning and budgeting that matches forecasted needs with budget and workforce constraints. It requires accurate forecasting and labor modeling tools to tailor labor plans to local environments. It requires advanced scheduling engines that conform staffing to traffic flows, national labor laws and budget constraints. And it requires time and attendance systems to ensure the resources scheduled are on the job helping turn shoppers into buyers. All of these functions are supported by JDA Workforce Management.

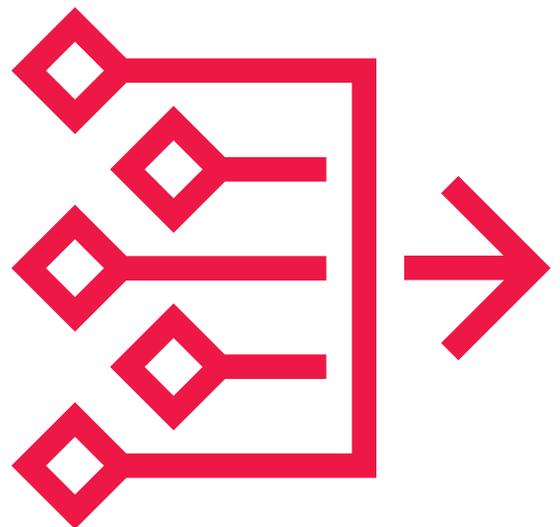
Corporate Planning

Long-term labor planning is as much about corporate strategy as it is about forecasts. That's why JDA Workforce Management provides powerful workforce modeling tools that allow you to perform what-if analysis balancing various corporate strategies, budget priorities and labor forecasts to arrive at the most optimal labor plan for your business. Its Workload Planner enables you to take these strategies down to the individual retail outlet level to balance corporate plans with actual workforce capacity. This ensures that each site reaches its potential without over-burdening or underutilizing its workforce.

Budgeting likewise is done from both the store and corporate perspective. The system creates a bottom-up forecast using store metrics and demand drivers. It then allows editing from the top down at any organizational level to conform the budget to corporate strategies. The final budget is then used as a constraint by the scheduling engine so labor is not scheduled beyond budget limits. The schedule constraint process uses smart algorithms to evaluate customer priorities for which hours, days or roles to cut, if necessary. For example, rather than cut cashier hours on Saturday to adhere to the weekly budget, the system would trim lower priority days and roles. It also ensures staffing minimums are maintained without inflating labor demand so essential services are always available.

Planning and budgeting processes are further complicated for global retailers by the vast differences in working time rules by region and country. Therefore, the planning and budgeting algorithms take into consideration the legislative and contract compliance requirements for each country and location. This ensures that annual compliance targets are met with weekly balancing. When completed, long-term labor planning and budgeting form the strategic foundation on which tactical labor forecasting and scheduling are based.

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- Model workforce requirements based on corporate strategies, forecasted labor and budget constraints
 - Balance plans with workforce capacity at the site level
 - “Bottom-up” and “top-down” budgeting
 - Budget constraints enforced in scheduling
 - Ensure compliance with country working time legislation and employment contracts
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Forecasting and Labor Modeling

The forecasting engine within JDA Workforce Management was built specifically for the asymmetrical patterns of retail, including seasonality, promotions, events and new product introductions. That's why it produces best-in-class forecast accuracy – a critical factor in minimizing labor costs without sacrificing service. But forecast optimization can go deeper to also consider the impact of external events, economic trends, weather and other variables to arrive at a labor forecast designed to maximize profit potential.

The forecasting application includes a labor modeling tool allowing you to run what-if scenarios to gauge the impact of traffic and task-based labor plans on utilization and profitability. Plan rollout can be phased to balance workforce requirements with capacity at each site. So for example, if your initial plan calls for all stores to run a promotion during the first week of October, but the model shows smaller stores would not have sufficient manpower to set up the promotion at that time, you may decide to allow them to set it up earlier.

Once modeling is complete and forecasts are established, the forecasts are configured for each store as the basis for scheduling. This granular forecasting method ensures that each store can effectively schedule their workforces to meet corporate objectives without over-taxing their resources.

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- Purpose-built retail forecasting
 - Best-in-class accuracy
 - Considers all traffic and related factors
 - Optimization to maximize profit potential
 - What-if labor modeling
 - Production phasing
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Advanced Scheduling

Scheduling is at the heart of workforce utilization, cost reduction and shopper conversion. Having the right number of associates with the right skills and tools scheduled to match traffic patterns is a critical factor in retail success. JDA Workforce Management has the industry's most sophisticated scheduling optimization engine, continually enhanced by our Center for Optimization Excellence, to meet this challenge.

The scheduling engine is rules-based. The user-defined rules can be based on standard timeframes such as day, week, month, or even intra-day. However, rules to meet legislative and contract compliance can be much more complex. For example, in Denmark a contract period typically covers 592 hours over 16 weeks. Other countries have different hours and multi-week scheduling requirements. In addition, many countries have special regulations for scheduling and/or paying holiday and sickness hours. Contract requirements may also vary from retailer to retailer.

JDA's Advanced Scheduling optimization engine handles all of these unique work rule permutations to create optimal, compliant schedules for each location in a single instance of the system. It ensures that schedules are as close as possible to contract hours and provides variance reports to help managers minimize payments and accruals for overages, as well as to avoid paying for contract

hours not used due to under-scheduling. It also accurately accrues compensatory allowances such as “time for time” required in some countries. And, as described above, the engine prevents scheduling beyond budget limits and self-adjusts according to user priorities.

Because the scheduling engine is rules-based, it is easy to set up and change rules by country and location to keep up with dynamic labor laws as well as other contract requirements. It contains a rule testing function that allows you to build new rules and test them against the actual environment before moving them to production, thus ensuring accuracy without disruption to field operations.

The scheduling engine also supports cross-location scheduling. For example, one drugstore chain uses this feature to schedule their pharmacists across multiple stores to ensure superior service during peak hours. It also takes associate preferences and planned absences into consideration when creating schedules. The scheduling engine is fully integrated with JDA’s Task Management solution to coordinate scheduling and budget constraints between traffic- and task-based labor.

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- Rules-based across standard timeframes and contractual hours
 - Country by country working time compliance
 - Weekly, monthly and annual contract hours balancing
 - Cross-location scheduling
 - Adherence to budget constraints and associate preferences
 - Easy to set up and change rules with testing function
 - Integration with task management
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Time & Attendance

Even the best schedule can be ruined if scheduled associates don’t show up for work, especially during peak selling hours. JDA’s Time & Attendance system helps guard against this by providing associates with mobile access to their schedules and sending managers alerts when associates fail to clock in for their shifts. Alerts are available on smartphones, tablets or other mobile devices along with workflows for immediate corrective action. This may be as simple as verifying an associate who is on-site failed to clock in, or contacting a list of associates by phone to fill the shift based on appropriate work rules. Using the scheduling engine to adjust for coverage variances ensures compliance with laws and contract rules, and also enables the balancing that helps minimize over or under utilization.

Time & Attendance allows associates to clock in and out from a virtually unlimited number of devices. In addition to standard interfaces to many types of clocks, biometric readers and other data capture devices, the system offers an open, real-time API via Web services giving companies the flexibility to use whatever data capture capabilities they choose.

The application also has a complete absence management workflow subsystem to accrue time off according to contract rules, track usage and maintain balances. It includes associate self-service access for reviewing balances, requesting time off, viewing work schedules, job bidding and swapping, and specifying schedule preferences. Access can be by telephone, smartphone, tablet, kiosk or home computer.

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- Verifies that scheduled associates are clocked-in
 - Mobile manager alerts and workflows
 - Contract provisions enforced for substitutions
 - Comprehensive absence management
 - Employee self-service
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Empowering Your Workforce

Too often companies talk about empowering their workforce, but don't give them the tools to make that a reality. JDA Workforce Management provides industry-leading tools to empower associates when performing both task-based and customer-facing responsibilities. These tools empower associates to be true competitive differentiators.

Localization

The first step in empowering associates is to provide them with the system and tools in the language and formats of their preference. This may include native language support, multiple currencies, date/time formats, job or role configuration, and screen labeling. This could be very burdensome for retailers operating across many borders, but JDA Workforce Management addresses this challenge by deploying only one version of the system for all locations, and dynamically translating the languages, formats and preferences by user as it is used. This makes updates simple while ensuring all locations are in sync.

Task Management

Non-traffic based tasks can account for up to 60 percent of labor capacity for some retail segments. That is why it is so critical to include task-based labor in your labor modeling and scheduling. At the same time, compliance with corporate merchandising plans is dismal for many retailers due to lack of resource capacity in the stores, poor communication capabilities, and an inability to set priorities and balance the effort with customer-facing duties.

JDA's Task Management solution solves these problems by:

- Building task labor requirements into labor models to accurately assess capacity and budget issues
- Enabling corporate planners to balance merchandising priorities with capacity issues by site
- Allowing planners to electronically communicate plans, priorities, timing and instructions (including planograms, photos, graphics, voice and videos)

- Enabling site managers to assign tasks to associates with priorities and instructions
- Providing an electronic feedback mechanism for associates and managers to report task completion as well as provide feedback for continuous improvement
- Empowering site managers and associates to communicate with corporate and each other through smartphones and tablets

Task Management allows corporate planners to see the capacity of each site and adjust program timing and priorities accordingly. It allows planners to communicate tasks to the stores and verify completion. The system allows site managers to see all of the tasks and priorities for his or her site and assign them to associates. It allows associates to see the tasks assigned to them along with instructions, priorities and due dates. And it allows both managers and associates to confirm completion and provide feedback on any problems incurred and give suggestions for improvement. This visibility and communication is available over the Web, on smartphones and tablets.

To further enhance communications, users can subscribe to alerts and notices over any of their devices concerning new task assignments, approaching due dates, overdue tasks and task completions. In the hectic world of today's retail sales, this proactive alerting is critical to ensuring all important work is completed on time.

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- **Integrated task- and traffic-based modeling and scheduling**
 - **Site capacity visibility for corporate planners**
 - **Electronic communication of tasks, priorities, timing and instructions**
 - **Bottom-up task completion confirmation and feedback**
 - **Empowers managers and associates over mobile and Web**
 - **Alerts broadcast across all channels**
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Manage on the Moment and Untether Your Workforce

JDA Workforce Management provides the industry's most comprehensive toolset for planning, scheduling and monitoring your workforce to remove as much variability and uncertainty as possible. With mobility capabilities and the ability to manage on the moment, you'll be prepared to handle the unexpected.

JDA Workforce Management provides tools to help you quickly and efficiently address unexpected challenges or disruptions. For example, the integration of Time & Attendance with Advanced Scheduling described above helps managers see and quickly fix holes in the schedule caused by illness or attendance problems.

If traffic flow is slower than expected, a store manager may send certain associates home early or delay or cancel others from reporting. If traffic exceeds expectations, the manager may have associates stay past their scheduled shifts or reallocate associates from slower-traffic departments. JDA Workforce Management can interface to a wide range of traffic counters, POS systems and other real-time data sources to alert managers to traffic variances, and it uses the scheduling engine to recommend staffing changes. This maintains compliance and balances workloads.

Similarly, managers are continually modifying task-based assignments. A high-priority task comes in from corporate, such as a recall. A promotional display collapses or is out of stock. Long lines develop at check-out lanes. Assigned tasks are past due or falling behind schedule. Or a surge in traffic necessitates that tasks must be dropped to assist customers. Managers need tools to help manage such disruptions. JDA Workforce Management's exception routines detect potential problems and send alerts to managers on their PCs, smartphones or tablets along with the data needed to analyze alternatives. Built-in, integrated user-defined workflows enable managers to quickly resolve the issue.

UNTETHERING YOUR WORKFORCE WITH MOBILITY

JDA's mobility capabilities mobilize your business-to-employee communications, procedures and processes and untether your workforce from their desks, manual forms and outdated communication methods. These mobile solutions empower managers and employees with the knowledge, tools and communications they need to better perform their jobs and enhance customer interaction and service — anytime, anywhere. These proven tools are helping companies realize significant monetary savings,



increased productivity and improved employee satisfaction, morale and retention.

JDA's mobility tools free managers from the back office, enabling them to stay on the sales floor while retaining full visibility into their team and critical activities. When a manager logs in to find several missed punches, time sheets to approve, requests for shift changes or swaps, and time-off requests, the mobile tool displays the alerts in priority order along with quick drill-downs to pertinent information and workflows to address each specific issue. The workflows are created by the appropriate scheduling, task management, and time and attendance systems so resolutions follow established work rules, regulations and company policies.

Managers can quickly and flexibly communicate notice of open shifts available for immediate pick-up to all available and compliant employees via mobile devices such as phone, email and SMS, enabling them to claim the shift based on organizational policies. This eliminates wasted time, keeps managers customer facing, increases the rate and speed with which shifts are filled, and drives higher employee engagement by permitting associates to select their individually preferred methods of communication with the knowledge that each associate has a chance at every available shift.

JDA's mobility solutions provide associates with mobile anywhere-access to their schedules, timesheets, time-off requests and more on smartphones and other mobile devices. This instant-anywhere access ensures that associates can track down their upcoming shifts and request statuses without needing to call in or wait until they can log into the portal from home. These mobile capabilities help improve employee satisfaction and decrease absenteeism. Time capture at the device level also eliminates the need for clock hardware in many environments.

Plan for the Future

The retail environment is much different today than just a few years ago. Consumers are much more demanding, have more choices and information at their fingertips, and expect great service. In this environment, your workforce can be your competitive advantage if you utilize them wisely and efficiently and equip them with the right information and tools to make an impact.

Properly managing and leveraging retail workforces takes a combination of sophisticated planning, budgeting and scheduling systems to set the framework for success, and real-time mobile tools to effectively deal with the inevitable disruptions. JDA Workforce Management provides this combination of plan for the future/manage on the moment technology to address the complete scope of retail operations. Its integration of strategic planning and budgeting capabilities, local workforce forecasting, modeling and workload balancing functions, and time and attendance capabilities with the industry's most accurate scheduling optimization engine and task management system prepares retailers to best meet customer expectations.

At the same time, the system's built-in alerting and mobile management capabilities empower associates and managers to expertly deal with whatever the moment throws at them – solving problems, managing resources and helping customers. Only JDA offers this comprehensive, integrated set of plan-for-the-future/manage-on-the-moment functionality globally with support for local environments, labor laws and work rules by country and contract. JDA Workforce Management is your one source for making your workforce an efficient, competitive differentiator for today's dynamic retail environment.

Deploy JDA Workforce Management Via JDA Cloud Services

Protect your JDA software investment and increase business agility by having JDA experts manage, monitor and maintain your JDA solutions. JDA Cloud Services reduces your implementation time and risk while enabling you to quickly and easily deploy new functionality to keep pace with your changing business needs. With your software running in the cloud and upgrades included in your service, you will benefit from solutions that are optimized for your specific business requirements to help ensure that you achieve and sustain a long-term return on your investment.



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