

# ClickRoster

World-class **shift planning**  
**and scheduling solutions**  
...across the entire organization



Get the most from your investment in people...



ClickRoster is uniquely positioned to create optimal shift patterns and schedules throughout the entire organization to maximize employee efficiency and overall operational readiness.

You run your organization in a way no one else does. Your long-term vision, strategy, competitive differentiation, operational decisions, and the people that you hire all determine how your organization performs and survives. Irrespective of size or industry, every organization has one common asset that is essential for delivering world-class organizational performance: people, who become your employees..

Some of your most pressing challenges regarding your workforce include determining how to staff your organization appropriately for future needs and deciding what hours or shifts your employees need to work in order to deliver required performance levels and qualities.

Those challenges are frequently resolved with varying degrees of accuracy however finding the optimal balance between operating costs, regulations, performance, employee staffing levels, employee satisfaction, and customer satisfaction is difficult. Finding an ideal workforce size is always challenging; overstaffing introduces excessive operating costs, but understaffing can impair operational performance, impacting both employee and customer satisfaction. You may have the right number of employees, but if you've planned their shifts incorrectly, making them unavailable when you really need them, then your decisions may be questioned. Even if your organization operates in industries in which regulation or governments define your allowed employee numbers, you must still use and deploy your people in the most efficient manner possible.

Your employees may have preferences and limitations regarding what shifts they can or desire to work, so their needs should also be considered.

**All these operational challenges need balancing.**

**So how do you achieve it?**

“Since implementing ClickRoster, our manpower planning and staffing has become a much easier task to complete, and ClickRoster enables us to meet our manpower budgets.” **Adi Levy, Head of Operations, EL AL Call Center, Customer Division**

## Introducing ClickRoster

The answer is to invest in the best planning and scheduling software available to increase your employee efficiency. The best way to optimize your workforce is not to determine where to add more employees but rather to determine how to make your current staff more efficient. ClickRoster promotes this theory: Don't add; improve. Strive for efficiency and operational excellence.

**This is where ClickRoster plays a vital role.**

Organizations that rely on shift-based workforces can use ClickRoster to eliminate messy, complex, and often unsatisfactory approaches to planning and staffing shifts.

ClickRoster is **an advanced planning tool** for the entire organization that **creates optimal shift patterns and employee schedules** by considering customer demand and coverage, costs, employee availability, profiles and preferences, working time regulations, union agreements, and the need to balance undesirable shifts among all appropriate employees.

By **automating** and **optimizing** one of the most complex activities in any organization, and by taking into account all the operational factors that may sometimes conflict, you can:

- **Increase visibility** into the entire organization so that you know exactly who is working, during which hours, and on what day, giving you the ability to **cover operational demand** and **increase customer satisfaction**
- **Increase compliance** with working time regulations, union agreements, industry regulations and, where appropriate, take into account employee preferences to maintain and **increase employee satisfaction**
- **Reduce operating costs** by assigning the right number of employees to **the most efficiently designed shifts**, thus avoiding costly overstaffing or frustrating understaffing that may lead to increased overtime payments or expenditures on contractors
- **Streamline and increase communication** with your employees electronically, ensuring that you provide **consistent information** quickly and directly, when and where it is needed

## ClickRoster Available Options

Every organization has its own planning and scheduling techniques. Some organizations may rotate shifts in a set manner for long periods, meaning that the shifts change infrequently, if at all. In contrast, shifts may **change frequently** to respond to **changes in demand** or to specific **event management** that requires irregular or one-off staffing. Shift planning and scheduling may focus on hourly, daily, weekly, monthly, annual, or one-off time frames.

Recognizing that organizations have differing requirements, ClickRoster is **available in three editions** containing increasing levels of functionality and sophistication. Whether you need a functionality-rich product to create and manage your rosters manually or enterprise-wide automated optimization, you will find an edition of ClickRoster to suit your organization's needs.

## Find the edition of ClickRoster that's right for you.

### Foundation Edition

ClickRoster Foundation Edition is the entry-level product enabling your organization to design and plan rosters manually. When using the Foundation Edition, you still **enforce your organizational rules**, such as matching employee skills to roles and positions; consider the geographic dispersal of your people and the shift locations; and ensure that your overall **shift schedule meets demand** and working regulations and directives.

### Professional Edition

ClickRoster Professional Edition takes your organization to the next level of efficiency, by removing routine manual planning to **automatically create rotating shifts** while still meeting your business rules. The Professional Edition introduces **shift trading** functionality, which allows your employees to discuss and then agree upon temporary shift changes. But what happens if something significant could change within your organization? The Professional Edition introduces user-created **What-If scenarios** so you can plan ahead and simulate any possibility.

### Foundation Edition

Use intuitive manual techniques to plan and build your rosters

### Professional Edition

Automatically created shifts and schedules take your organization to the next level

### Advanced Edition

Develop optimal rosters across your entire organization























### Advanced Edition

ClickRoster Advanced Edition is the ideal product for developing **optimal rosters** across the entire organization, **encompassing all employees**, and ensuring that flexible shifts **meet anticipated demand levels**. The most comprehensive, flexible, and dynamic of the three editions, ClickRoster Advanced Edition contains all the functionalities of the other two editions, plus **simulation tools** to calculate demand levels based on forecasts.

## Features

ClickRoster contains a wide range of features and functions that vary by product edition.

	Foundation Edition	Professional Edition	Advanced Edition		Foundation Edition	Professional Edition	Advanced Edition
 <b>Manual Shifts</b> Create static, non-rotating, shifts manually using drag-and-drop techniques	✓	✓	✓	 <b>Create What-If Scenarios</b> The What-If scenario creator enables you to plan for future possibilities should your organization change, ensuring that your shift planning remains accurate and appropriate	✗	✓	✓
 <b>Employee Skills</b> Take into account employee skills to ensure the shifts are covered by those with the correct skills and competencies	✓	✓	✓	 <b>Simulation Tools</b> Simulate the management of the demand placed on your organization by using detailed tools to ensure that all shifts match the expected demand	✗	✗	✓
 <b>Employee Preferences</b> Employees may have preferences about which days and shifts they prefer or prefer not to work. Take these into account to maximize employee satisfaction	✓	✓	✓	 <b>Optimal Shifts – Demand Based</b> Create demand-based, dynamic shifts that maximize your ability to cover demand with shifts that can change daily or even hourly	✗	✗	✓
 <b>Geographic Information</b> Not all shifts begin or end at the same place, so you can use location information to increase planning accuracy, enhance employee communication, and better manage overnight stops	✓	✓	✓	 <b>Optimal Shifts – Employee Efficiency</b> Create dynamic shifts that get the most efficiency from your employees, with shifts that can change on a daily basis	✗	✗	✓
 <b>Automatic Rule Checking</b> Automatically check every shift and shifts combination to ensure that all organizational rules are honored and that you understand the implications of any necessary rule violations	✓	✓	✓	 <b>Optimal Shifts – Minimal Costs</b> Create dynamic shifts that operate your organization at the minimal operating cost, with shifts that can change on a daily basis	✗	✗	✓
 <b>Automatic Demand Coverage Checking</b> Automatically check every shift to maximize the coverage of demand, ensuring that your employees are working when they are needed most	✓	✓	✓	 <b>Contact Center</b> Create optimal shifts for the contact center using forecast data from the CTI system and optimizing based on traditional contact center key performance metrics	✗	✗	✓
 <b>Time and Attendance</b> Enable employees to enter their actual working hours to track progress against the planned shifts. Extend this functionality out into the field to maximize productivity	✓	✓	✓	 <b>Organization-Wide Shift Planning</b> Create shifts for the entire organization, regardless of role or location, including the contact center	✗	✗	✓
 <b>Reports</b> Standard reporting (and report creation wizards in the Advanced Edition) keep you focused on how your organization is performing	✓	✓	✓	 <b>Employee Communication</b> Communicate with employees regarding shift information via desk, portal, or mobile communications	✓	✓	✓
 <b>Employee Shift Trading</b> Sometimes even the best shifts need tactical-level amendments to reflect changes in availability, so enable your employees to swap shifts with colleagues	✗	✓	✓	 <b>ServiceOptimization Suite Extension</b> Expand your solution to encompass other products from the ServiceOptimization Suite in order to drive end-to-end efficiency throughout your organization	✓	✓	✓
 <b>Automatic Rotating Shifts</b> Remove the pain of manually creating shifts by determining automatic shift rotations that take into account organizational rules and employee profiles	✗	✓	✓	 <b>Integration</b> Easily integrate with your call center, HR, and payroll systems, using Web Services and an SOA infrastructure to maximize data integrity and consistency throughout all your organizational processes	✓	✓	✓

## The Unique Value of ClickRoster

Traditionally, organizations have developed or invested in multiple products for shift planning, regardless of the roles and locations of their employees, by focusing on and specializing in just one area, such as the contact center or mobile workforce.

**ClickRoster eliminates the need for multiple products, combining enterprise-wide planning and scheduling in just one product!** You no longer need to invest in a variety of products from different vendors. ClickRoster and the associated ServiceOptimization Suite address your departmental and overall organizational needs with just one technical platform.

ClickRoster creates enhanced organizational efficiencies by providing you with a full view of the entire organization and removing departmental silos.

## Solution Expansion

While accurate shift planning is a difficult and sometimes-daunting task, it is often just the starting point in many industries for managing a wider and even more challenging situation: the end-to-end management and optimization of the entire service chain. With ClickRoster, you decide your employees' working hours and shifts however many organizations also need to schedule their employees to specific jobs during their shifts. ClickSoftware's ServiceOptimization Suite provides the solution.

The ServiceOptimization Suite delivers end-to-end optimization across your entire organization. While ClickRoster can be deployed as a stand-alone product, it also plays a vital role in this decision-making suite.

- **ClickForecast** – Create a demand forecast for the next year, month, or week, separated by geography, business line, and skill set, to help project workforce capacity
- **ClickPlan** – Interactive and automated workforce planning based on the forecast and known workload. ClickPlan enables organizations to resolve workforce shortages and surpluses weeks and months in advance
- **ClickSchedule** – Optimized scheduling, dispatch, and routing for improving workforce productivity by balancing customer, service, and asset resources, as well as organizational preferences, including contractual commitments, service-level agreements, priority, drive time, skills, and resource availability

- **ClickContact** – Put the management of the service experience into the hands of customers by providing self-service appointment booking and updating over the Internet, automatic customer notifications, and the option for a post-service survey
- **ClickMobile** – Mobile workforce management for monitoring field workforce activities enables real-time updates from the field and optimizes the schedule to increase workforce efficiency, adding real, measurable value to the service chain
- **ClickLocate** – Capture the location information of field-based resources and/or their vehicles and integrate with ClickSchedule for use in optimized scheduling
- **ClickAnalyze** – Service business analytics for workforce performance measurement and strategic decision support across various levels of the organization

## Find Out More

For more information on ClickRoster and how ClickSoftware has helped organizations around the world improve their operational efficiencies, visit [www.clicksoftware.com](http://www.clicksoftware.com), where you can access case studies, white papers, articles, and the ClickSoftware blog, Clickipedia.

## About ClickSoftware

ClickSoftware is the leading provider of workforce management and service optimization solutions that create business value for service operations through higher levels of productivity, customer satisfaction, and cost-effectiveness. Combining educational, implementation, and support services with best practices and its industry-leading solutions, ClickSoftware drives service decision making across all organizational levels. From proactive customer demand forecasting, capacity planning, and shift scheduling to real-time decision making, incorporating scheduling, mobility, and location-based services, ClickSoftware helps service organizations get the most out of their resources. With more than 150 customers across a variety of industries and geographies, and with strong partnerships with leading platform and system integration partners, ClickSoftware is uniquely positioned to deliver superb business performance to any organization.

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