STAFF PLANNING OPTIMISATION

Company X

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ABSTRACT

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The purpose of this research was to find out how the staff planning at Company X is perceived and how it could be further improved in the sales function. The objective was to find new staff planning strategies and to do a case study on one of the store's departments. With the case study department, a new rota was planned together with the department and a follow-up planned. Parts of this thesis are bound to secrecy and are not published.

The data for this thesis was collected using both quantitative and qualitative data collection methods. Surveys and open discussion were used with the case study department of 10 people. A total of 11 people were interviewed for the general part of this research. The interviews were semi-structured interviews. There was no ready-made set of questions, but rather a framework of themes discussed with the interviewees.

The major findings of this research were that the duty rosters should be available in an electronic format as well as the forms related to it, such as day off wishes and shift switches. It was also found out that the competence of the co-workers should be developed in order to being able to back up sick leaves and help with sudden queues. All managers should also go through their department's rota with the co-workers for hour allocation optimisation.

This thesis provides the starting point for staff planning optimisation at Company X. The results will be discussed and analyzed together with the store's management group and all the managers in sales, and an action plan will be made. It would be interesting and recommended to conduct a similar research for other functions, too. This thesis can be used as a basis for similar researches at different companies in the future.

hrm, staff planning, hour allocation, competence development

CONTENTS

GLOSSARY

rota	workplace schedule
vs.	versus
HR	human resources
HRM	human resource management

1 INTRODUCTION

1.1 Background

This final thesis will focus on the staff planning of Company X. The topic was brought up by the Human Resources manager of Company X together with the store's management group. The thesis will also include a case study done with one sales department of Company X.

The author will analyze the global staff planning process and that of Company X: what is done, how it is done and why. Personal interviews with co-workers, managers and staff planners will give insights on how the staff planning process is seen in the company X as a whole, and based on the analysis of the interviews further improvements and possible new staff planning strategies will be proposed.

During the case study, the employees' opinions of the staff planning will be carefully analyzed, and together with the employees a new rota will be planned and executed. The employees will be heavily involved in the process of planning the new rota, thus creating more co-worker engagement.

1.2 Objective/goal

The main purpose of this thesis is to find out how the staff planning at Company X is perceived, and how it could be further improved. Other main purpose of this thesis is together with one of the sales department's employees plan and execute a new rota for their department, and based on the findings give a recommendation on how to further implement it for other departments in the future as well.

Staff planning involves many different legal aspects, such as how many consecutive weekends you can work, how many consecutive days you can work, how much rest you need to have between shifts, and so on. It is also heavily reliant on business needs and store opening hours. Especially in retail business, it is just not possible, or at least not efficient, to have all the co-workers working 8-hour regular shifts but rather the shifts need to alter between 4 to 10 hours. The minimum and maximum length of the shifts in retail business in Finland comes directly from the collective agreement.

The shifts in retail are irregular, and it can be hard for the employees to understand why they have to do, for example, multiple 4-hour shifts during a week instead of longer shifts, and why there are certain amount of people working at a certain time. One of the objectives of this thesis is to raise awareness between the co-workers on how and why staff planning is conducted at Company X the way it is.

Planning the rota together with the co-workers will also hopefully reduce the amount of day off wishes and shifts switched with others, reducing the required manual work after the initial shifts are planned. According to Helsilä (2002, 97) research is seen as therapy and the employees feel that for once they are able to give feedback and are listened to. Thus, the job satisfaction of the employees should also improve due to the involvement of the co-workers in the research and in the decision-making process as part of the study.

1.3 Research question

The research question of this thesis is "How staff planning is perceived at Company X?". It is analyzed through multiple interviews of employees in different positions; staff planner, managers and co-workers. A survey (Appendix 1.) is used with the case study department to analyze the chosen department more in-depth. So, both quantitative and qualitative research have been utilized in order to answer the research question.

Sub-questions of the research are:

- What changes should be made in staff planning at Company X?

And for the case study department:

- Are weekends more manageable after the changes? Are there enough employees during weekdays?
- Can the required preparations be done for the weekend with the new rota?
- Did sales increase?

The hypothesis is that the employees at Company X are quite satisfied with the current staff planning. The lack of option to check your shifts online, outdated day off wish policy, and the number of employees during rush hours and weekends can be seen as issues. Managers might also want that they had even bigger role in staff planning for their own department, because they have all the up-to-date info on their respective departments all the time. A staff planner is planning the shifts for a significantly large number of employees making it hard to keep up with every little detail of every department and co-worker all the time.

1.4 Methodology

Scientific research is problem solving and aiming to find out causalities and principles of the research subject matter. Research can be empirical or theoretical research. (Heikkilä 2006, 13.)

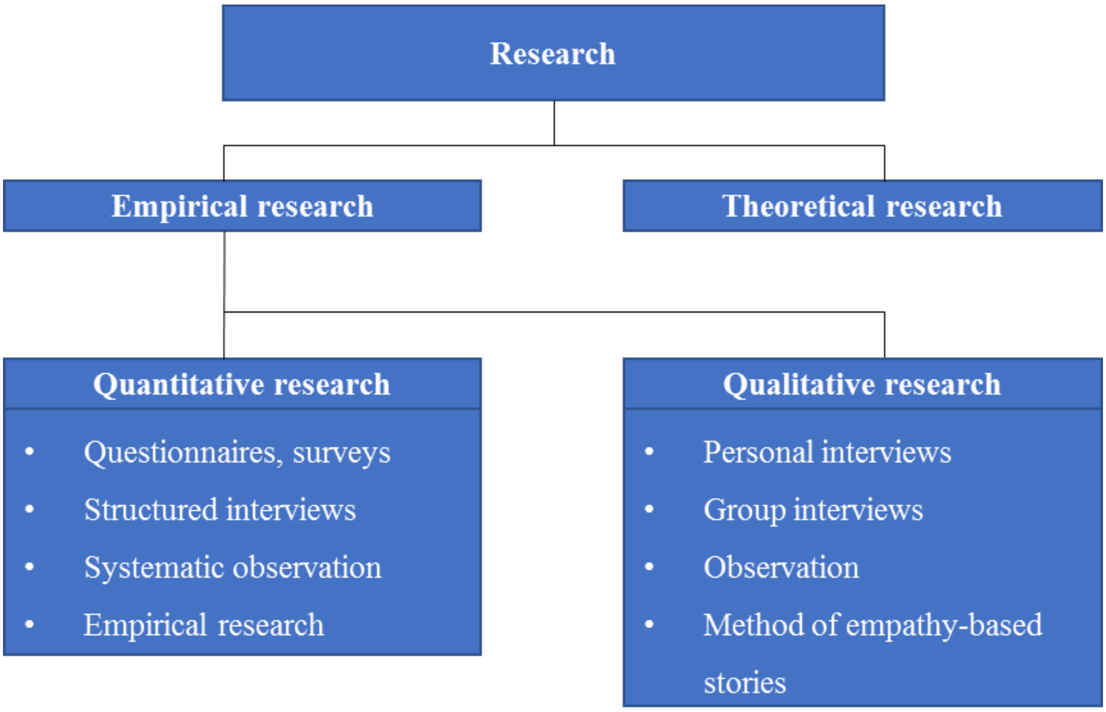

FIGURE 1. Empirical vs. theoretical research (Heikkilä 2006, 13)

Empirical research is based on the methods developed from the theoretical research. The research can test if a hypothesis derived from a theory comes true. The research problem can also be finding a solution on how some specific matter should be executed or implemented, or finding the reason for certain phenomenon or behavior. (Heikkilä 2006, 13.)

For the purpose of this thesis the author will utilize both quantitative and qualitative research methods. Quantitative and qualitative research are very different in their nature, and collecting the data is done differently.

Quantitative	Qualitative
• What? Where? How much? How often? • Numerically big, representative sample • Description of phenomenon based on numeric data	• Why? How? What kind of? • Narrow, discretionary sample • Understanding phenomenon based on ”soft information”

FIGURE 2. Quantitative vs. qualitative (Heikkilä 2006, 17)

According to Alan Bryman (2006, 97), the integration of both research methods has become more common and it can be seen as its own distinct approach: mixed methods. For this thesis, the author will have personal interviews with staff planner, managers and co-workers. A questionnaire for the case study department was used, and a meeting with the department was scheduled to further discuss the matters based on the results of the questionnaire.

Quantitative research, or statistical research, answers the questions why, where, how much and how often. Typical data collection methods for quantitative research are, for example, surveys, questionnaires, and structured interviews. Usually the sample size in quantitative research is bigger than in qualitative research. Quantitative research is used to find correlations and changes on the phenomena. Matters are illustrated with numeric variables, and the results can be demonstrated with different tables and figures. Quantitative research is criticized for its superficiality: the researcher might not get deep enough into the subject matter. Thus, the possibility of wrong interpretation of the data, especially if the subject matter is not familiar to the researcher. (Heikkilä 2006, 16.)

Qualitative research helps to understand the research subject and explain its behavior and decision-making process. Qualitative research answers the questions why, how, what kind of. The sample size is usually narrow, and the examinees are carefully selected. The aim of qualitative research is not to get statistical generalizations but instead accurate data of the carefully selected sample. Typical data collection methods for qualitative research are, for example, personal interviews, group interviews, and theme interviews. (Heikkilä 2006, 16–17.)

Quantitative analyses are typically more univocal than qualitative. In quantitative research the different stages of the research are more distinct, too. In qualitative research the data collection, analyzing and deduction intertwine more closely with each other. In qualitative research the researcher might have to analyze the results already in the data collecting phase and, on the other hand, when analyzing the data the researcher might remember some important point, which has not been written down in the data collection phase. (Heikkilä 2006, 18.)

1.5 Limitation

This study is limited to Company X and to its sales departments in particular. Even when the study is limited to Company X sales departments, the research will give a good starting point for research on other departments, too. Sales departments' managers and co-workers were interviewed, as well as a staff planner. One of the sales departments was chosen for the case study because the department's manager saw a need to re-plan the weekly hours allocation. All the interviewees were randomly selected by the author, based on who was working and had time when the interviews took place, thus probability sampling was used.

Sales is the biggest function in the store and concentrates on the core business of Company X, while having very similar working hours and shifts to most of the store's functions. That is why this thesis concentrates on sales departments in particular. The findings of the research won't be applicable outside of Company X, and they will mainly apply to the sales departments. However, some of the findings and suggestions will be applicable to Company X as a whole for the more general parts of staff planning. The research and its findings cannot be directly applied into other similar companies in Finland or abroad, but they can provide a basis and key points on how to conduct such research and provide a preliminary hypothesis for similar companies. This research is conducted solely for the purposes of Company X, and the goal won't be having a standardized solution for other companies.

Future researches on this topic could take a different approach and overcome some of the limitations of this study. For example, researching and analyzing the whole Company X and all of its functions by collecting data through a probability sample where N is the whole population of the Company X across all of the different functions. Similar research methods are suggested: utilizing both qualitative research in form of interviews and quantitative research in form of questionnaires. Or a similar research to the author's research could be conducted in a different location, and the differences between the results could be further analyzed, and best practices standardized.

1.6 Reliability and validity

The findings are internally reliable for Company X. If a similar research would be conducted in the future with different people, the results might differ from this study. If the research was conducted in a different location, the results could also be different. And if the research emphasized some other function than sales the results might be different, too. If, however, the exact same research would be conducted right away, or after a very little time within the same function, it would most likely give the same results and be repeatable. The research is conducted only for the purposes of Company X, so even when the research is not replicable elsewhere in a sense that the final outcome would be different, the goals of the research are still achieved.

This research focused on the sales departments, thus the results cannot be generalized to all the other functions, though similarities probably occur. All of the people taking part in the research knows the researcher and that can influence the results, too. It might be better if the interviews and surveys were conducted by a person the employees don't know beforehand. On the other hand, the author having two years of working experience from Company X can also help a lot in formulating the questions and asking more Company X specific questions. The author having a general knowledge of the company and its procedures helps to understand what can be seen as problems and why.

The interviewees were a randomly selected group of both genders with different contract hours, departments and positions. The interviewees represented roughly 13.5% of the whole sales department's population. Though, small sampling error might occur, the research is still internally reliable. The answers for the research question "What changes should be made in staff planning at Company X?" was found, making the research valid.

2 HUMAN RESOURCE MANAGEMENT

2.1 What is HRM?

HRM stands for Human Resource Management. According to Hendry (2011, 3) HRM is still an ambiguous concept. Darwish (2013, 7) and Stavrou-Costea & Svetlik (2007, 198) agrees that HRM does not have a clear definition. HRM has developed rather rapidly, and it has become a long way from its starting point (Darwish 2013, 1.) This thesis gives a brief overview on the matter based on different perspectives found in literature.

Hendry (2011, 3–4) gives three different levels of definition for HRM. The first definition is just that human resources are seen as the most important asset of the company. The second is that the employment practices are tied into the company's organization strategy. This means that employment decisions, rewarding, competence development, and other matters affecting motivation should be consistent. The third definition, or level, is that HRM has an underpinning, distinctive philosophy securing employee motivation and commitment, putting management style and company culture to an important role. However, even these three different definitions cannot be put together to create a complete definition for HRM. (Hendry 2011, 3–4.) Human resources are definitely starting to be seen more valuable in companies and employees are being invested on.

Before HRM, the term employee management was used. According to Darwish (2013, 1) HRM is a closer alignment of the procedures of work and employment relationships with objectives of the organization. Scholars have often taken either a systems perspective or a strategic perspective on HRM. The systems perspective concentrates on the effects of specific HRM practices on company or employee performance. The strategic perspective has different variations and approaches to it. One approach is to align the company's strategic goals with HRM practices and to lead, guide and train the employees to support the strategy. Other approach takes in consideration the contextual factors, such as company size, industry etc., on the efficiency of an HR system. (Darwish 2013, 1–2.)

Helsilä (2002, 15) divides Human Resources as follows:

- Forming personnel
    - recruiting
    - introduction
    - professional guidance
- Personnel steering and supporting
    - employment matters
    - wages
    - payroll administration
    - availability discussions
    - job satisfaction evaluations
- Personnel know-how development
    - continuing improvements
    - competence development
    - development discussions

One of the most essential points in HRM is that employees and their relations are seen as resources. Instead of employees, HRM manages employees' personal and interpersonal traits. Human resources are not brought into companies just through recruitment but also by investing in the employees' capacities. (Stavrou-Costea & Svetlik 2007, 198–199.) Through competence development companies become more flexible, and by investing on the employees their respect for the company grows. Competence development is discussed more in-depth on chapter 3.6.

Human resource management is always one of the top priorities in companies. What makes it difficult is that you have to take all of the following in consideration:

- company's vision, values and strategies
- manager's personal qualities
- employees' own wishes and goals
- laws, rules and regulations

And in addition, justness and consistency must be taken in consideration, too. (Helsilä 2011, 16.) Company culture is an extremely important matter from the employee perspective regarding how they feel about the company: are the values and environment inspirational and encouraging to work at.

Nowadays, job satisfaction and well-being are a big part of HRM, especially management of work-related stress and coping with the workload are taken seriously. According to Helsilä (2011, 172) the ability to work is understood more and more comprehensively. Employee's way of living and employer's procedures on safety and ergonomics at the workplace are important. Well-being at work is a combination of physical, mental and social aspects. Physical exercising or the possibilities for it provided by the employer only ensures a good physical condition. (Helsilä 2011, 172.) The mental and social well-being should also be considered at the workplace.

2.2 Recruiting

"... in an increasingly competitive and global economy, the key to future success and growth is simple: Hire the right people and retain them." (Taylor & Stern 2009, 2). Companies often claim employees to be their most important asset yet pay little attention to long-term retention. Companies with high employee turnover are less effective. All the time spent on recruiting is away from concentrating on the core business. (Taylor & Stern 2009, 2–4.) After the recruiting and training, it is important to being able to retain the employees at high enough rate to maximize the company's efficiency.

Recruiting means all the actions a business does when hiring the personnel needed at a specific time. The decision to recruit is always a strategic decision. The first things to consider before recruiting are "Do I need a new employee?" and "Am I ready to think differently?". Perhaps the open position could be given to a current employee, the working hours could be rearranged, or subcontracting used. (Helsilä 2011, 20–21.) Sometimes it is also mandatory to offer the hours to the current employees before opening a new position for external candidates to apply. Adjusting the contract hours of the current employees can save time and money spend on recruiting and training.

There are various different recruiting platforms such as word of mouth through current employees, Internet, radio, tv, job center, magazine ads, recruiting fairs, etc. Strategic decisions have usually long-term impacts, and they might be financially and mentally hard to undo. So, not only machinery and equipment investments should be carefully planned but also the personnel. (Helsilä 2011, 22–24.) Different social media platforms are becoming more common in recruiting. Overall, companies are operating more and more on the Internet and social media. LinkedIn, Facebook and Instagram are starting to be crucial platforms for almost all of the businesses nowadays.

Common methods for recruiting are:

- cover letter and CV
- interview(s)
- references
- applicability tests
- language tests
- simulation of work situations
- health examination

Group interviews are an effective way to handle first round(s) of interviews, especially when talking about big companies with many candidates. It saves time from not needing to interview all the candidates individually, and gives more flexibility to utilize more recruiting methods for the candidates proceeding into the next round(s) of the recruiting process.

Even if several of the above-mentioned methods are used, some of the recruits still turn out badly. In an interview, both parties might glorify and exaggerate. A good introduction and training should always be provided, in order to raise the average recruits into a good ones. If a complete mistake in recruiting has been made, it should be admitted and fixed. Mistakes are important learning points for future recruiting. (Helsilä 2011, 24–25.)

Taylor & Stern (2009, 68) suggest creating an employee-centered workplace culture and making the employees to fall in love with the company in order to retain them. Rewarding the employees with meaningful incentives, being equal and competence development are some of the key factors in retaining the employees. The intangibles matter greatly: as long as the salaries are on a competitive level with the competition, the intangibles play a bigger role. (Taylor & Stern 2009, 73–82.) This could mean, for example, different vouchers, workplace lunch at reduced price, gym for free or at reduced price, inspirational working environment, bonuses, financial support in different courses or trainings outside of the workplace, regular training at the workplace etc.

2.3 Introduction to job

A careful introduction to a job cannot be underestimated. Introduction to a job means the procedures with which the employer aims to adapt the new person to the new job and working environment. Introduction varies between positions and companies, but it can be categorized into three subcategories:

- company introduction
  - the company and its vision, business idea, strategies and policies
- work environment introduction
  - co-workers, customers, premises
- job introduction
  - expectations, wishes and demands of the new job

For bigger companies it is recommended to systematize the introduction process, designate the employees giving the introduction, and ensure the success of the process. (Helsilä 2011, 52.) A follow-up interview with external employees can give insights on what should be addressed in the introduction. Many things might be taken as self-evident while the new employees would benefit from hearing them already at the introduction.

Well-being at work should also be discussed during the introduction. Occupational health and its services, any specific job-related well-being challenges, employer's procedures to ensure the health of the employees, and any necessary precautions should be clear to all new employees. A safe physical environment should not be the only focus. According to Franklin (2003) millions of adult working days are lost every year due to bullying at workplace. The employer is also responsible for the psychological well-being of the employees and they should know how to act if experiencing or witnessing any kind of inappropriate behavior at work.

If an internal employee changes position, then only the job introduction is required. Then again, if the new employee comes from a different city or country, a further introduction to the local area might be required or recommended. It is essential that the introduction is planned carefully, and constant learning opportunities are provided especially in the beginning of the employment. (Helsilä 2011, 53.) The importance of constant learning and competence development is further addressed in chapter 3.6.

2.4 Company culture and values

In international company acquisition research, it is found out that the crucial factor for the acquisition to fail is often the different company culture or the incompatibility of them. Company culture is the model for the basic principles of a company. It is trained for new employees as the correct way to see, think and feel the different company related questions. Company culture also includes any myths, stories, legends and symbols of the company's history. For example, how a certain negotiation situation was pivotal for the company or how an individual or a team achieved something spectacular. It also includes values, beliefs, policies, manners and rituals. (Helsilä 2011, 56.) Company culture and values should be communicated efficiently at every stage of employment starting from the recruiting process till the time the employee is leaving the company for whatever reason.

A value is what makes a matter meaningful and good. Values reflect the company's ethic. Usually morality, the understanding what is right and wrong, is included, too. Together these can be seen as a "religion" of the company. The values are guidelines what turns into norms. Thus, the managers do not need to motivate the employees, but the employees commit to the assimilated values and they work as motives. However, the values need to be properly communicated so the employees are aware of them. Big, globally successful companies see the leading by values as the most important part of leadership. (Helsilä 2011, 57–59.) When combining good company values with the incentives and intangibles discussed in chapter 3.2 the employees' commitment increases even more. It should be expected that employees are motivated enough by just the company values, but many companies are already offering some intangibles. In the future it might even be expected for companies to bring extra value to not only customers but employees as well.

The customers' value based decisions are becoming more and more significant. One of the most essential demands are ecology and sustainability. The role of the customer is switching from a passive buyer into an active influencer. (Kuusela & Neilimo 2010, 44–45.) The companies of today have to keep this in mind when working on their own core values. It can be beneficial to invest in sustainability and to actively communicate it to the customers and other stakeholders.

Company culture and values also affect the employees. As mentioned in chapter 3.2 the employer should try to retain its employees. Having the right company culture and values from the perspective of the employees is therefore equally important as from the perspective of the customer. Companies should also reflect their culture and values from the viewpoints of customers, employees and third parties, such as media or any cooperation partners.

2.5 Working time

Working time matters in companies are both operative and strategic. More and more people appreciate the flexibility of working hours due to commuting, child care services, hobbies or other private things. The possibility to regulate your working time is one of the fundamentals in reducing work-related stress. (Helsilä 2011, 115.) Offering the employees with flexibility on the working times could be a great value-adding intangible incentive to increase job satisfaction, commitment and even efficiency.

Consumers are used to getting services and products at almost any time. Working time is important for companies for competitive advantages. If a company proves to be flexible, for example, in deliveries and schedules, they tend to get more customers. Companies must be able to flex to customers' surprising needs and different peak days. (Helsilä 2011, 116–117.) But as mentioned above, companies are starting to need to be flexible for their own employees and their surprising needs and interests as well. Managing both requires flexible workforce together with efficient staff planning.

Working hours legislation in Finland does not include a five-day working week, but usually collective agreements demand it. The legislation allows the averaging of regular weekly working hours but not the averaging of regular daily working hours. (Hietala & Kaivanto 2008, 59.) The legislation and policies on working time can differ between industries and workplaces/units.

According to the collective agreement in retail (Kaupan työehtosopimus 2017, 27), the working week begins on Monday 00:00 unless locally otherwise agreed. The working time can be arranged in either one week or multiple week periods. In a period of one week, the working time can be maximum of 9 hours (or 10 if specifically agreed at the workplace) and the maximum weekly hours 37.5. Or there can be an adjustment period maximum of 26 weeks during which the working time levels on maximum of 37.5 hours per week. (Kaupan työehtosopimus 2017, 27.)

Working time is individually and unmistakably agreed with the employee in the contract of employment. The employee is obliged to work only according to the contract. (Moilanen 2013, 132.) Contracts of employment can be categorized into unlimited contracts and limited contracts.

2.6 Competence development

Often the reason for hurry, insufficiency and stress can be the lack of competence. The lack of professional skills, inability to organize and prioritize leads to insufficiency which harms the overall well-being at work. (Helsilä 2011, 82.) So, competence development does not only bring more value to the company, but it can improve the job satisfaction of the employees, too.

Nowadays it is widely understood that competence development is the responsibility of many. Employees are responsible for taking care that their competence is up-to-date, different learning institutions are responsible for arranging different learning opportunities, and employers should offer the possibility of competence development in both work and outside of it for their employees. (Helsilä 2011, 83.) By offering support for, for example, language classes or other beneficial training, the company can benefit from it in the form of more competent employees and increased job satisfaction which leads to increased efficiency.

Competence can be divided into operative capabilities and readiness and strategic capabilities and readiness. Operative capabilities and readiness is the information and skills you need to execute the everyday work. More training is required aiming to fulfill the demands of the future to support the operative capabilities. This is called strategic capabilities and readiness. (Helsilä 2011, 84.)

One example of the strategic capabilities could be cultural competence: cultural intelligence and cross-cultural skills are becoming more and more important in global business. Illeris (2009, 14–15) argues that global mindset, linked with cultural competence, is required to make strategic business decisions in the global environment.

A clear competence development plan which takes in account the employees' individual capabilities and their positions within the company and provides employees on every level of the company with appropriate training is highly recommended tool to increase the know-how and flexibility of a company.

Once the competence of the employees is developed the turnover of the highly competent employees should be minimized. On his book Six Sigma for Managers (2012, 152) Greg Brue advises the use of a specifically structured, incentive-based compensation plan on all levels of employment to minimize the turnover and the so-called brain drain.

3 COMPANY X STAFF PLANNING

Company X has two staff planners. When planning the shifts, the staff planners utilize rotas done by each functions’ managers. A rota consists of the different shifts for each day of the week; how many employees are working each day and how the working hours are allocated. It could be thought of as a schedule for the department.

The rotas for each department are done by the managers who have a certain working hours budget for the whole fiscal year. The budgets are distributed globally, and then allocated in country level, and then further allocated to functions and departments. When the departments’ managers get to know their budgets, together with the function leaders they allocate the hours throughout the whole fiscal year within the budget given to them.

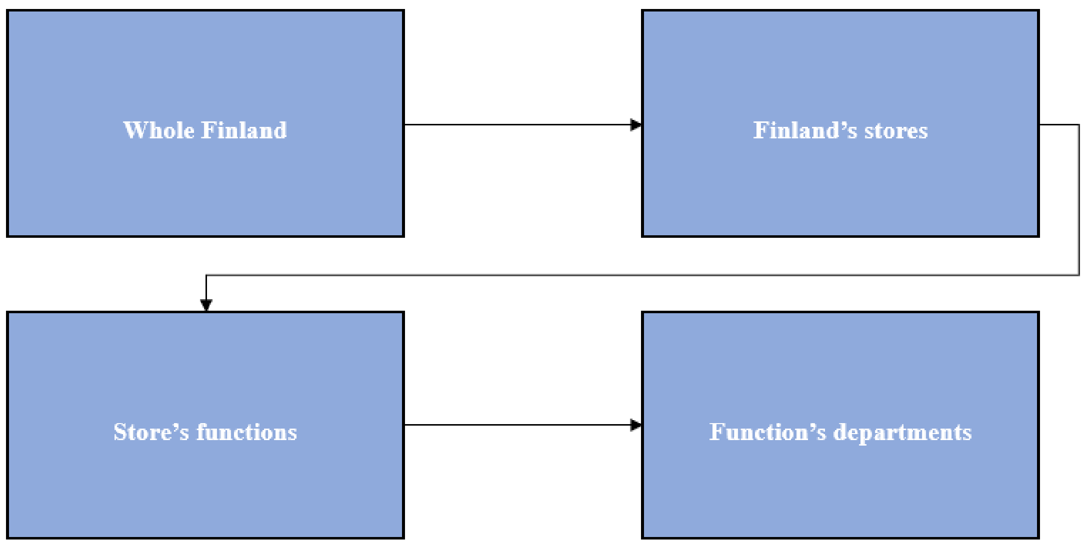

FIGURE 3. Hours allocation

Due to the nature of how the working hours are distributed, there is no room to waste the hours. Even if the managers are able to get more hours than originally budgeted to them, it requires a thorough explanation why they need more hours, and how it would improve the business. If a manager can prove that, for example, the would be generating a lot more sales if they had extra pair of hands, it can be justified to give the manager more hours. However, it is not self-evident and that is why managers should aim to get the most out of the hours they are originally given. Poorly constructed rotas waste the hours, while well-planned rotas are efficient and take in consideration the limited amount of hours and how to best utilize them.

In addition to working with the rotas, the staff planners are also in close co-operation with the managers. A staff planner plans the shifts and together with the department's manager check them before publishing. So, the managers are actively involved in each week's planning by checking the lists and making any required adjustments before the lists are published to the co-workers.

3.1 Contracts and working hours

Company X staff planning and working hours varies between different functions. On this thesis the author will be concentrating on sales function; all the interviewees were representatives of sales except for the staff planner, and the case study department was also a part of the sales function.

The employment contracts in sales varies between 12-37.5 weekly working hours. Earlier there was also 10 hours per week contracts, and some employees still have them, but for new employees the minimum amount is 12 hours per week as this is the new global guideline. The full-time contracts for 37.5 hours per week are basically only for the managers, and the sales co-workers usually have 30-hour contracts at most.

The reason for having contracts with different amount of working hours comes directly from the business needs. In retail business it would not be efficient to have only full-time workers working the same hours every single day, instead you need to take in consideration the busiest days and even the busiest hours in the staff planning. By having employees working less hours, it is possible to fill in the gaps in the staff planning when it is needed. It makes sense business-wise to have less employees working when there are less customers and, on the other hand, have appropriate number of employees to meet the customer needs during the store's rush hours.

3.2 The opening hours

The basis for the staff planning in sales comes from the store's opening hours.

Due to the legislation changes in Finland, the stores in retail business can now freely choose their opening hours. However, Company X only did minor adjustments in Finland after the changes. The busiest times in sales are definitely during the weekends, and this has to be taken in consideration in staff planning.

Different campaigns and peak days must be considered, too. Peak days are days with exceptional number of customers and well above average sales. Peak days are known and forecasted beforehand, thus making it possible to prepare to them accordingly.

3.3 Tools

The staff planners at Company X use MaraPlan software for planning the shifts. Another program used in staff planning is TimeCon. TimeCon is used in access control and working time monitoring. Working time reports and duty rosters which are distributed to departments and co-workers are printed from TimeCon.

In addition to MaraPlan and Timecon, the staff planners have different excel forms where they keep track of, for example, weekends worked by the employees and other such things what MaraPlan cannot do. The MaraPlan version used at Company X is rather old, and an update should be coming in the future.

3.4 Publishing, day off wishes, switching shifts

On Wednesdays, when the shifts are published, the staff planner walks through the store distributing all employees' and departments' shifts into their lockers. The shifts are on paper, printed out by the staff planner. Currently the shifts are only available on paper.

Since the shifts and working hours at Company X are irregular, it is possible for employees to make day off wishes if necessary. The shifts are planned 5 weeks in advance, meaning that employees have to wish for days off 6 weeks in advance. Currently the system for wishing a day off works as follows:

- Fill in a form by hand where you include your name, wish and the date
- Have your manager sign the form
- The form is delivered into a box that the staff planner checks once a week
- Staff planner takes the wish in consideration when planning the shifts

It is also possible to switch shifts between the co-workers. Currently the system for this is as follows:

- Both co-workers fill in a form by hand
- Both forms are signed by their manager
- Signed forms are delivered to the same box as the day off wishes
- The shifts are changed on the department’s list
- The shifts are changed in MaraPlan
- If the shifts are not the same length, another adjustment in MaraPlan is required
- The shifts are changed on the duty managers’ file

3.5 Holidays

The holidays are planned by the departments’ managers. The staff planners only assist in the planning process, if necessary. The holidays are planned hierarchically from top to bottom: first the store’s management group’s holidays are planned, then the department managers’, and then last the co-workers’. The managers can freely plan the holidays together with their department in the best possible way they see fit. The holidays must be planned in a way that the departments are able to function, so the goal is as little overlaps as possible. The summer holidays are always a bigger and more time-consuming planning process.

4 INTERVIEWS

The objective of interviewing employees was to get a general view of the opinions on staff planning at Company X across the sales function; how the current staff planning processes are perceived and how they could be further improved. The interviews gave the starting point on what issues would be further discussed with the case study department.

The author interviewed a total of 11 employees consisting of sales co-workers, sales departments managers and a staff planner. The staff planner was chosen to be interviewed by the author, while the rest of the interviewees were randomly selected depending on who were working at Company X and had time when the interviewing took place. The total amount of sales co-workers at Company X is under 100 including the managers.

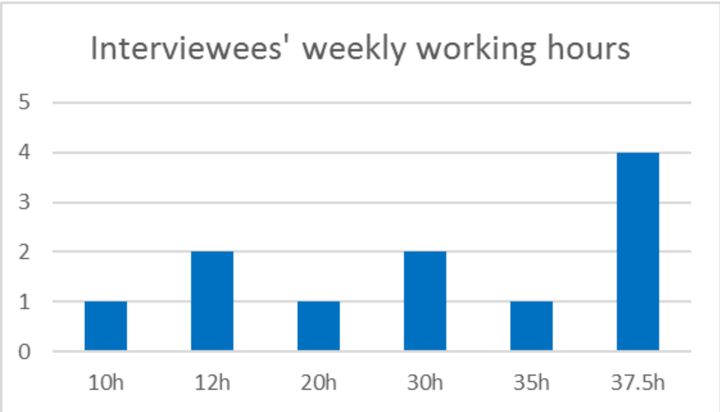

FIGURE 4. Interviewees’ weekly working hours

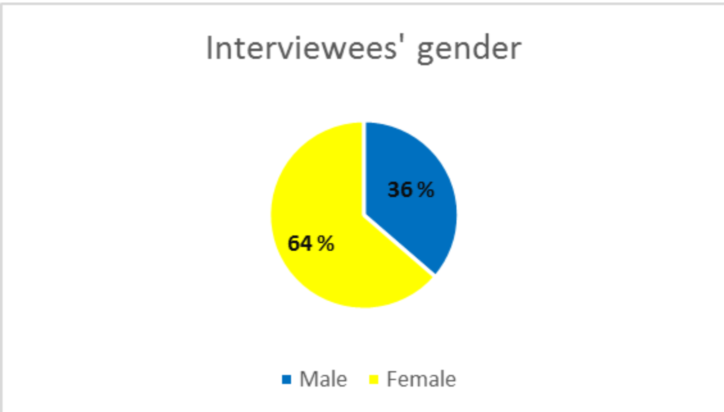

FIGURE 5. Interviewees’ gender

The interviews were open discussions with the employees about staff planning and everything related to it. There was no ready-made set of questions, but the structures of the discussions were similar to each other. The matters discussed in the interviews included the current practices with duty rosters, day off switches, and switching shifts, rota planning, holidays, staffing levels, managers involvement in staff planning, and staff planner's views on staff planning.

The interviews were open discussions and the questions were formed with each interviewee depending on the position and the department they were working at. If the interviewees had faced problems or difficulties with staff planning, more time was used to discuss those matters. However, as earlier mentioned, the interviews were similar to each other, but the emphasis on the interviews differed between the interviewees.

4.1 Hypotheses of the interviews

The hypothesis before the interviews were that the employees would be mainly satisfied with staff planning at Company X. Lack of possibility to see their shifts online, the day off wish process, and possible understaffing during peak hours and weekends can be seen as drawbacks. It is also hypothesized that the managers would like to have a bigger role in the staff planning as they had before when the store did not have separate staff planners.

Company X has a lot of global and local guidelines, rules and strategies regarding the staff planning, and the author believes these to be followed and utilized, and thinks the focus should move towards the little everyday things what matters the most for the co-workers. Those little details are essentially what makes a big difference in terms of job satisfaction and they are more concrete for the co-workers.

4.2 Analysis of results

The interview results mostly matched the hypotheses. Employees are mainly satisfied with the staff planning or feel that minor adjustments could be made. Desired changes include the transition towards electronic duty roster and day off wishes, better preparation for sick leaves, and planning the rotas together with the departments.

At the moment, employees do not really use their printed duty roster for anything else than taking a picture of it and then tossing it into trash. Many departments also have social media groups, such as WhatsApp groups, where they share pictures of the duty rosters in case someone wants to see their shifts outside of work.

The day off wish process is seen as a burden from both the co-worker's and manager's perspective: neither parties do not see why the manager's signature is required on the wish, and the whole system with small printed papers are seen as clumsy. Managers are more interested in knowing in advance about longer wishes than just for a day or two.

All the interviewees agreed that their departments have mainly sufficient amount of co-workers working at a time, but if there is even one person sick, it causes problems when trying to find someone to replace. Campaigns and peak days are, contrary to the hypothesis, properly staffed.

Some of the interviewees still felt that their departments are sometimes understaffed even when there are no sick leaves. Small departments where are usually only one co-worker working at a time feel that it would be beneficial for the shifts to sometimes overlap for a while, allowing the co-workers to discuss the department's matters face to face.

The opinions on holiday planning were divided: while some feel that they get to know their holidays far too late, some are happy with the current system, and some even feel that they must wish for their holidays far too early. According to the staff planner, the process could be done earlier than now. However, the bigger problem might lie in the inconsistency of the current system. The date when you get to know your summer holiday has varied over the years.

The managers would like to have a bigger role in the staff planning or completely plan the shifts by themselves. They feel that with the current system, they spend almost the same time making little adjustments on the staff planner's work than it would require them to plan the shifts from the scratch. However, the managers agreed that it is easier to have a staff planner to work with combo-workers who are actively working on multiple different departments.

The interviewed staff planner is satisfied with the co-operation with the managers, and thinks it works well. She has also worked in other positions at Company X, and feels that it helps her work in staff planning. The only drawback she could think of, was the strict schedules during weeks where she has additional trainings or meetings. On normal weeks the workload is manageable. The staff planners have started to have monthly skype meetings and these have been really beneficial.

5 CASE STUDY

One of the sales departments was chosen for the case study department by the request of the department's manager. After the interviewing of sales co-workers and managers in general, a closer look was taken on the case study department's rota.

Based on the interviews, a questionnaire was formed and sent to all of the case study department's ten co-workers to fill in before a group discussion with the department about the rota and staff planning. The discussion was scheduled to be a part of the department's meeting. Having a rather strict timeslot for the discussion affected the depth of it.

The objective was to discuss the current rota and see how the co-workers feel about it. The department was quite satisfied with the current rota, but together with the department's manager a proposition for a minor adjustment was made. The department was happy to try it out, and understood the reasoning behind it.

MON	**TUE**	**WED**	**THU**	**FRI**	**SAT**	**SUN**
9-17	9-17	8-16	9-17	9-17	9-17	9-17
10-16	10-16	10-16	10-16	10-18	10-18	10-18
13-21	13-21	13-21	13-21	13-21	11-19	12-18
16-21	17-21	16-21	17-21	17-21	12-16	12-18
17-21					12-20	

FIGURE 6. Case study department's new rota

The following changes were made:

- A short 4-hour shift was added on Saturday
- Friday's shifts were revamped to make the evening easier
    - Friday evenings are usually busy
    - Preparations for the weekend should be done, which takes time

According to Helsilä (2011, 116-117) companies must be able to flex to customer's needs and peak times. By having an extra pair of hands on Saturday evenings that usually are busy, the case study department is able to meet the customer needs better. Also, if all the preparations for the weekend are done in time on Friday, the co-workers are better available to customers during the weekends.

The new rota will be tested for a period of two weeks, after which a feedback from the co-workers is collected. Based on the feedback either:

1. More adjustments are made to better meet the customers’ and business’ needs
2. The new rota stays and will be used as the new basis for the case study department’s staff planning
3. Returning to the original rota

The planned implementation of the trial period will take place during weeks 2 and 3 in 2018. When planning new shifts, it takes at least 5 weeks before the shifts roll out due to the staff planning cycle at Company X. There are also campaigns, peak days and new co-workers coming in before the beginning of 2018, and that is why the trial period will be postponed till the situation is normalized in the department to get more accurate feedback of the new rota.

The purpose is to optimize the staff planning, and if a newly implemented method does not work, then it either needs to be changed or discarded. There is no need to reinvent the wheel, but having the courage to actively try new methods and approaches can lead to improvements or strengthen the existing processes, and is therefore recommended.

After the trial period, the author and the case study department’s manager will attend a managers’ info session in January 2018 to tell all the other managers what we did, why we did it, and why they should do it, too. All the recommendations for Company X staff planning will also be presented by the author of this thesis and discussed with all the managers.

6 RECOMMENDATIONS

6.1 Day off wishes, shift switches, duty roster

It is recommended to update and simplify the processes of day off wishes and shift changes between co-workers and make them easier for all the parties involved. It is recommended that the current forms used for these processes are made into PDF forms which are saved to all department's folders on their computers. The co-worker would fill in the PDF form and send it to the staff planner and the co-worker's manager via email. The manager's approval for the wish would only be required for longer day off wishes than two consecutive days by either an email confirmation to the staff planner or a discussion with the manager and the co-worker before the wish is sent.

The document for switching the shifts between co-workers would also be made into a PDF form and used similarly to day off wishes. A co-worker would fill in the form, email it to the staff planner, co-worker's manager and the other co-worker. The other co-worker would then confirm the information by replying to the email. Therefore, only one document is needed, and the process is much faster and easier for the co-workers than it currently is.

In the long run, the goal would be to have the duty rosters in electronic forms as well. This is something that would need a further discussion on how to implement it, but the possibility to see one's personal shifts and the department's shifts online is something that should unquestionably be possible in the future. Depending on the implementation of this, the day off wishes, and other such processes could be included in the same platform.

There are some problems with co-workers working in multiple departments: sometimes they get their duty rosters only on one of the departments they work on, and the duty roster can show a day off on the other department's list even when the co-worker has a shift on the other department. These problems would go away with the electronic duty rosters. For the time being, staff planners should be extra careful when delivering the duty rosters for combo workers.

6.2 Rota planning

Based on the interviews, the case study department was not the only department who would like to go over their rotas and possibly make small adjustments and try them out. It is recommended that each department's manager prepares a meeting with the department where the manager presents the current rota, and together with the department brainstorms how it could be further improved as it was done with the case study department.

The managers could get valuable input from their co-workers on the hour allocation, even if they are relatively small things, but they could make a difference. Then, if seen necessary, the department can have a two to three weeks trial period with the made adjustments to the rota to see if it is better than the currently used version.

6.3 Competence development

As discussed in the chapter 2.6 lack of competence can lead to insufficiency and stress. (Helsilä 2011, 82.) Competence development can increase the flexibility of the company and the job satisfaction of the employees.

At Company X sick leaves were perceived as the biggest understaffing related issue. Currently it can be problematic to find a replacement for co-workers on sick leave, especially on the departments requiring more in-depth knowledge of the products or processes.

It is recommended to have more cross-department training and short working periods on different departments for the high potential co-workers, making the pool of co-workers more competent and flexible. By having multi skilled co-workers who feel confident working on other than their home departments, it is easier to find replacements when someone is on sick leave, help with sudden queues at the departments or at the cash line, and adapt to personnel changes.

According to Greg Brue (2012, 152) the turnover of the highly competent employees should be minimized. Company X could come up with an incentive-based compensation plan to retain the competent employees for as long as possible to maximize efficiency and to save training costs.

6.4 Holidays

The opinions on holidays were very divided. When some co-workers felt that they get to know their holidays far too late, some felt that they had to wish for the holidays far too early. It is recommended that all managers further discuss this with their co-workers and then share their findings in a managers' info or a meeting.

It is also recommended that the holidays would need to be wished and then later published at the same time each year. It should be communicated through the internal staff magazine, and emphasized by each manager on their department. By doing that the co-workers would know how the process works, and they can make their holiday plans accordingly.

Each department plans their own holidays together with the manager and the co-workers. The ways how different departments are doing this could also be discussed in a managers' meeting and then the best practices used in all of the departments. The planning should be conducted in a way that the co-workers can see each other's wishes and then communicate and adjust their wishes based on that, minimizing overlapping.

6.5 Managers

Managers involvement in the staff planning should be kept as it is. Some managers do think that it would be more convenient for them to plan the shifts all by themselves, but if the aim is to have a more flexible workforce by training multi talent co-workers, who are able to work in multiple different departments, the staff planning process will most likely get more complicated in the future. Therefore, it is recommended to keep working with the staff planners as so far.

6.6 Staff planners

All of the staff planners at Company X in Finland have started to have skype meetings once a month, and they should be continued. This is an extremely good venue to go through any problems or hot topics with others working in the same position. For some of these meetings, depending on the topics, it would be good to have the HR managers involved. They are certainly interested in the issues and updates, too.

To be able to keep up with the workload, when trainings, infos or meetings are scheduled for the staff planners, they should be spread on different weeks, if possible. Sometimes, when the staff planner has had a lot of trainings or meetings, she has had to work an extra shift on Saturday to get everything done in time due to the strict schedules of publishing the shifts.

7 FOLLOW-UP

The new rota for the case study department will be tested during the weeks 2 and 3 in 2018. It will be a trial period of two weeks, during which the functionality of the rota will be analyzed by the co-workers. After the trial period, the co-workers will have a meeting with the case study department's manager, and together they will go through the feedback of the trial period and then act accordingly.

The recommendations will be presented to the store's management group during December 2017, and an action plan will be made on how to proceed. Some of the changes, for example, the electronic day off wish practice can be implemented swiftly, while some of the recommendations will require more planning, time and discussions with the department managers.

The author will attend a managers' meeting together with the case study department manager in January 2018 to tell everyone what was researched and done with the case study department, and raising awareness on how doing the same for their departments would be beneficial. The author will also attend a sales function meeting in early 2018, and go through all of the results of this study there as well.

8 CONCLUSIONS

The research question of this thesis was "How staff planning is perceived at Company X?" and the sub-question was "What changes should be made in staff planning at Company X?". The thesis provides an in-depth answer to these questions. To summarize, the staff planning at Company X is perceived to be on a very good level. However, minor immediate changes are required as well as some long-term actions. All the recommendations, both short-term and long-term, are presented in chapter 8 of this thesis. The immediate changes to be considered are the renewal of the day off wish and shift switch policies.

The sub-questions for the case study department were:

- Are weekends more manageable after the changes? Are there enough employees during weekdays?
- Can the required preparations be done for the weekend with the new rota?
- Did sales increase?

These questions can be answered after the trial period of the new rota. The trial period will take place during weeks 2 and 3 in 2018, after which a feedback is collected from the employees. However, a two-week trial period might be too short for answering these questions and it might need to be extended to get comparable results.

The recommendations will be shared with the store's management group in December 2017, and an action plan on how to proceed is done together with them. The author will also participate in a managers' meeting and sales function's meeting in early 2018 and go through the results and the recommendations of this research. During the managers' meeting the author will recommend all the managers to have a rota planning meeting with their departments to optimize the hour allocation to increase efficiency.

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APPENDICES

Appendix 1. Survey for the case study department

1) Tuntisopimuksesi?
2) Kuinka tyytyväinen olet Yritys X:n työvuorosuunnitteluun?
3) Kuinka tyytyväinen olet osaston miehitykseen yleisesti?
4) Kuinka tyytyväinen olet suunniteltujen työvuorojen pituuteen?
5) Mitkä ovat mielestäsi pahimmat miehityksen ongelmakohdat? Onko työntekijöitä toistuvasti töissä liikaa tai liian vähän?
6) Onko kampanjoiden aikaisten miehitysten kanssa ollut ongelmia? Millaisia? Mikä on toiminut hyvin?
7) Kuinka usein keskimäärin vaihdat vuoroa työkaverin kanssa (esim. 6-12kk aikana)?
8) Kuinka usein keskimäärin esität vapaatoiveita (esim. 6-12kk aikana)? Oletko ollut tyytyväinen Yritys X:n vapaatoive systeemiin? Olisiko siinä jotain parannettavaa?
9) Kuinka aikaisin haluaisit saada tietää työvuorosi, ja kuinka pitkäksi ajaksi eteenpäin?
10) Vapaa sana työvuorosuunnittelusta & miten itse uudistaisit sitä? Mikä toimii mielestäsi hyvin ja mikä heikommin?