



# Automated Scheduling

## Key Features

- Instantly generate optimal schedules that match business needs with employee preferences and skills, including the most qualified employee for a shift based on skills, performance, labor rules, budget constraints, and compliance rules.
- Artificial intelligence (AI) curates shift offers automatically in seconds based on preferences, skills, and compliance factors.
- Schedule bidding by skills and seniority ensures employee preferences and all collective bargaining agreements are met.
- Automatically schedule top performers at peak times.
- Generative AI Schedule Assistant provides a conversational interface to provide insights and recommended actions and make schedule changes.
- Smart Templates support the creation of stable and predictable schedules for employees. Recurring shifts can be created and assigned before the optimization process.
- Supports fixed and dynamically built shifts simultaneously in a single process while considering labor guidance.
- During schedule generation, Legion WFM's multi-location optimization process automatically assigns employees across locations based on business needs and employee skills and preferences.

What could go wrong with an accurate forecast and optimal labor plan? A lot, especially when it comes to employee satisfaction and retention.

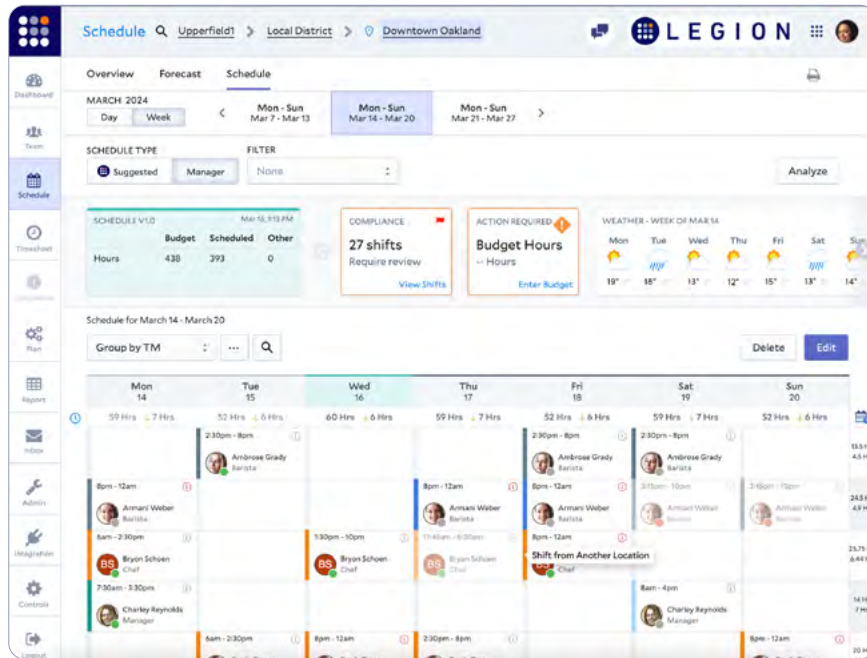
Traditionally, managers are given a forecast and expected to create a schedule that meets business needs, stays within the defined budget or scheduling rules, and satisfies employees' preferences. It's a nearly impossible, time-consuming task. Adopting legacy scheduling solutions can also be problematic because managers aren't comfortable with automatically generated schedules that they can't adjust. Often, the result is schedules that miss the mark.

## THE LEGION SOLUTION

### Reduce Administrative Burden on Managers

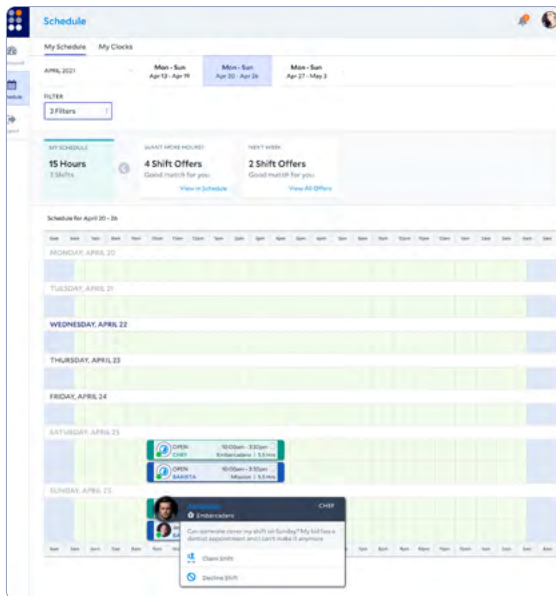
Legion Workforce Management (WFM) enables intelligent automation to create optimal schedules that match business needs with employee preferences and skills 96% of the time. With Legion Automated Scheduling, managers can instantly create optimized schedules based on labor rules, budget constraints, compliance rules, and employee skills, performance, and preferences.

Assigning employees and managing bidding for shift patterns can be time-consuming and cumbersome for unionized businesses. Legion provides an easy process that streamlines scheduling. Administrators configure a bidding window and available shift patterns. Employees can select and rank the patterns they want to work which are then assigned automatically to employees based on seniority.



## Easily Manage Unexpected Changes

Automated Scheduling makes managing unexpected changes to published schedules easy. Unlike legacy workforce management solutions which simply send employee requests to managers to deal with, Legion fully automates approving swaps and generating targeted offers for the best-fit employees to cover open shifts.



Legion Automated Scheduling enables intelligent automation to find the best-suited employee to fill open shifts based on compliance rules, employee skills and preferences, and labor policies. Managers can ensure the most critical shifts, including peak hours, are filled first. Legion's AI-powered recommendation engine considers multiple sources of information, such as skills, availability, and past behavior, to automatically send shift offers to employees. Managers can receive a notification that the employee has accepted the offer, and the employee is automatically added to the schedule.

They can also increase their labor pool by automatically scheduling employees with matching skills and preferences from nearby locations. With Legion Automated Scheduling, managers can reduce scheduling creation and maintenance time by 50% to focus on driving revenue and retaining employees.

## Optimized Schedules That Continuously Improve

Automatically generated schedules continuously improve by incorporating and learning from managers' positive edits.

The Legion scheduling engine automatically applies rules and constraints, such as scheduling policy rules, minor laws, meal and rest breaks, availability, and work role assignments. And managers automatically receive warnings if they make an edit that violates any configured rules.

A weighted Schedule Score helps managers assess whether a schedule meets their objectives. With dashboards and tools, managers can see if their edits are improving or reducing the quality of the schedule. For example, they can see how the Schedule Score fares against the business's key goals, including accuracy at peak and non-peak times, compliance, budget, and meeting employees' availability needs.

Moving forward, based on a better understanding of manager edits and changes, only modifications that enhance the Schedule Score and do not violate configured rules will be incorporated.

## Fill in Coverage Gaps and Give Employees Gig-Like Flexibility

Legion WFM offers powerful, fully automated options for sharing employees across locations for labor efficiency while ensuring scheduling policies and compliance rules are met. During schedule generation, employees can be automatically assigned across locations based on business needs and employee skills and preferences.

Legion WFM's intelligent automation ensures overtime, premium pay, clopening, meal breaks, and other labor regulations are factored in across locations and jurisdictions. Employees also get additional options to earn wages without trading convenience.

## Provide Schedule Empowerment to Employees

Satisfied employees who like their schedules can improve their effectiveness, attitude, and well-being. A perfect match schedule is the foundation of a good job and leads to better retention and excellent customer service.

Companies that use manual or legacy solutions may produce schedules that don't meet the employees' needs and are posted inconsistently. Employees are unaware of changes and must go to the store to get their schedule, creating a negative experience.

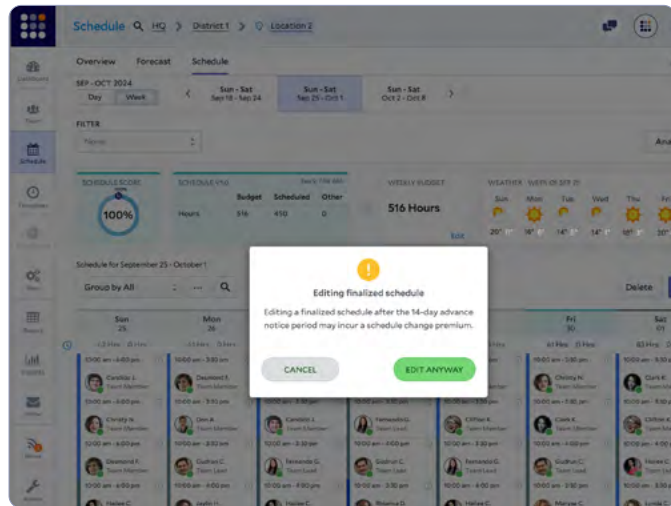
With Automated Scheduling, employees can share their preferences on when, how much, and where they work. They can easily access their schedules, request changes, pick up shifts at other locations, swap shifts, receive and respond to open shift requests, and request time off in the Legion mobile app. To meet predictability requirements and improve the employee experience, schedules are posted at a set time. All affected employees are notified of changes, eliminating delays and lost communications.

## Manage Compliance with Ease

Legion WFM enables intelligent automation to manage compliance across all jurisdictions. Labor laws are automatically applied to the schedule, and managers receive automated prompts to ensure their manual edits do not introduce risk or violate rules. Compliance templates with your policies are pre-loaded for all states and automatically applied to new locations/stores.

Legion's AI-driven Schedule Optimizer automatically factors in compliance regulations during schedule generation with smart alerts and insights provided to managers during schedule edits to notify them instantly when they increase compliance risk. All employee self-service actions (e.g., swaps, covers) are automatically validated against compliance regulations.

Schedule attestation allows managers to capture reason codes for schedule changes within the advance notice period. It also allows employees to indicate whether they accept or decline schedule changes.



### Benefits

- Automatically match preferences with business needs:** Employees indicate their scheduling preferences, and Automated Scheduling intelligently matches their preferences to your labor needs—96% of the time.
- Unburden managers:** Maintain oversight and control while reducing scheduling time by 50%. Instantly approve or deny time off requests, shift swaps, and shift claims based on rules and copy schedules forward to a new week.
- Increase coverage with workforce sharing:** Employees indicate where they can work, adding variety to their work lives while filling coverage gaps and enlisting last-minute help.
- Minimize compliance risk:** Automatically factor in labor compliance rules and business policies and ensure predictable schedules. Build trust through transparency and schedule equity.
- Schedule the best employee for the job:** See and schedule top performers during peak periods or special events and schedule employees across multiple locations with built-in productivity metrics.
- Empower employees:** Gig-like flexibility is delivered automatically. Give employees more control with automated self-service shift swaps and shift claims, the ability to define when, how much, and where they want to work, and the ability to update their preferences anytime.
- Intuitive, highly-adopted app:** Legion's intuitive, modern app is the highest-rated app in the industry, with tens of thousands of users giving it a 4.8 rating in the app store. It is used by 88% of employees weekly.

### Related Products

- Labor Budgeting
- Demand Forecasting
- Labor Optimization
- Time and Attendance
- Frontline Communications
- Time-off Management
- Legion InstantPay
- Legion integrates with leading Task Management solutions

## What Makes Legion Automated Scheduling Different?

Legion Automated Scheduling makes it simple to generate a superior schedule automatically—with one click. Unlike legacy solutions, Legion's cutting-edge AI processes hundreds of permutations, learns constantly, and is built using precise demand forecasts. Optimized schedules can be created in seconds. Automated Scheduling takes care of labor operations so managers can focus on managing the business, increasing sales, and creating a culture that retains employees.

Request a demo to see Automated Scheduling in action. [Learn more](#) about how Intelligent Automation powered by Legion WFM simplifies and reduces scheduling time.



## About Legion

Legion Technologies delivers the industry's most innovative workforce management platform, enabling businesses to maximize labor efficiency and employee engagement simultaneously. The award-winning, AI-native Legion WFM Platform is intelligent, automated, and employee-centric. It's proven to deliver 13x ROI through schedule optimization, reduced attrition, increased productivity, and increased operational efficiency. Legion delivers cutting-edge technology in an easy-to-use platform and mobile app that employees love. For more information, visit <https://legion.co> and follow us on [LinkedIn](#).