



## SOLUTION BRIEF

# Legion Automated Scheduling

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

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, 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, potentially impacting retention.

[A recent study](#) found that greater schedule flexibility lures hourly workers to new job opportunities. When asked what top three incentives, besides pay, would drive hourly workers to take a new job, almost 60% said the "flexibility to pick up extra shifts and swap shifts." Other top drivers were the "ability to easily give schedule input" and greater transparency into how shift assignments and hours are given. Having the capability to deliver schedules that meet both the business's and employees' needs is a critical part of retaining employees and attracting fresh talent.

*"There's not an employee that's not in love with Legion, and especially the app because [employees] didn't have that visibility and ability to start seeing what other shifts are available themselves instead of asking a manager before."*

**Executive Director of Information Systems, National Convenience Store Chain**

# The Legion Solution

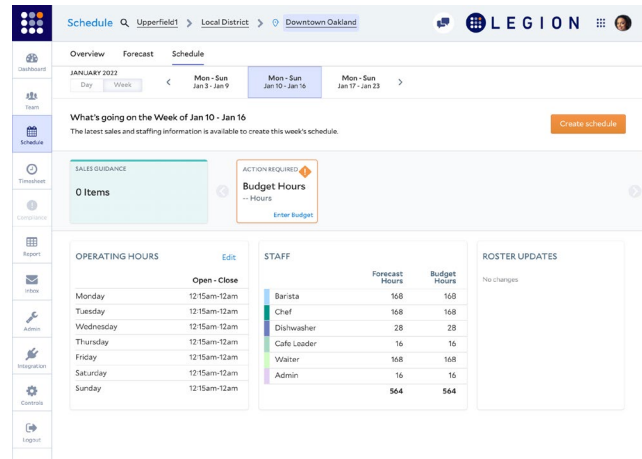
## Reduce Administrative Burden on Managers

Why spend excessive time creating schedules that don't meet your business needs or make employees happy? By embracing technologies like AI to intelligently automate tedious tasks, managers will have more time to focus on the human aspects of work, such as mentoring their teams and recognizing their accomplishments.

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 shift pattern bidding can be time-consuming and cumbersome for unionized businesses, but Legion streamlines the process with automation. Administrators configure a bidding window and available shift patterns and then employees can select and rank the shifts they want to work, which are then assigned automatically to employees based on seniority.

The Legion Generative AI Schedule Assistant gives managers a conversational interface for analyzing schedules to provide insights and recommended actions. The Schedule Assistant enables managers to easily access schedule data without spending time searching and filtering in the application. With natural language commands, they can make quick schedule edits on the go.



## 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 based on compliance rules, employee skills and preferences, and labor policies.

With Legion Automated Scheduling 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.

Managers 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.

Legion Automated Scheduling automatically applies rules and constraints, such as scheduling policy rules, minor laws, meal and rest breaks, availability, and work role assignments. Managers automatically receive warnings if they make an edit that violates configured rules.

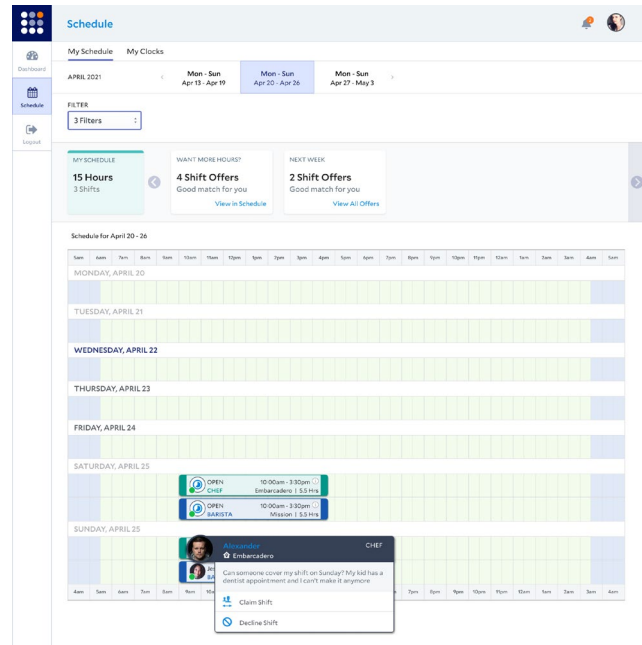
A weighted Schedule Score helps managers assess whether a schedule meets their objectives. With dashboards and tools, managers can see if their edits are improving or reducing the quality of the schedule. For example, they can see how the Schedule Score fares against the business's key goals, including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

Legion AI's self-learning capabilities will ensure that only modifications that enhance the Schedule Score and comply with all configured rules are incorporated. This adaptive approach continuously improves and optimizes schedules based on a deeper understanding of manager edits and changes.

## 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 meeting scheduling policies and compliance rules. 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

When employees like their schedules their effectiveness, attitude, and well-being are improved. 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 Legion 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 and 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. During schedule edits, smart alerts and insights notify managers 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.

*"Building a schedule with Legion has been great because it's intelligent, automated, and employee-centric—and that's exactly what we need. You want to allow our store manager to spend less time building a schedule and spend more time on the sales floor, giving the best customer experience."*

**François Paquin, Senior Manager  
for Sales and Operations at  
ALDO Group**

*"Now our employees can swap shifts, take open shifts, and put in their availability all from their mobile phone. They just have a better experience with their schedule and have a more predictive schedule as well."*

**Director of Workforce Planning,  
Retail**



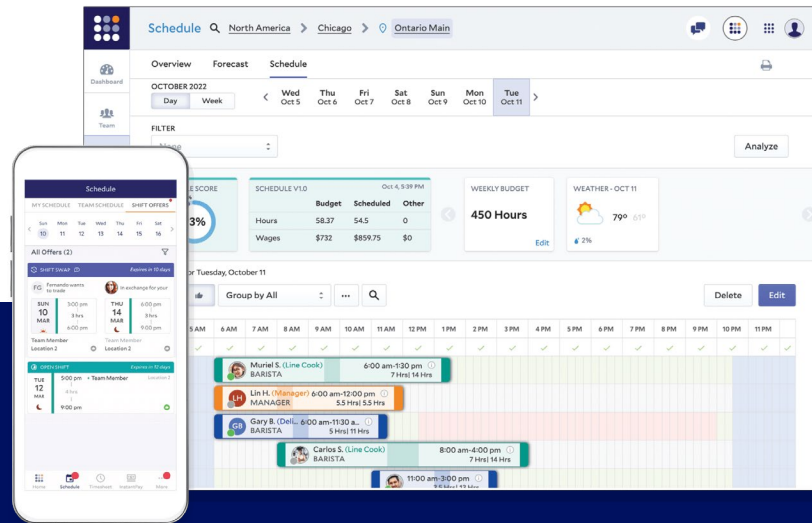
## Key Features

- Instantly generate optimal schedules that match business needs with employee preferences and skills, including the most qualified employee for a shift based on performance, labor rules, budget constraints, and compliance rules.
- Curate shift offers automatically in seconds with artificial intelligence (AI) based on preferences, skills, and compliance factors.
- Ensure employee preferences and all collective bargaining agreements are met with schedule bidding by skills and seniority.
- 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.
- Automatically assign employees across locations based on business needs and employee skills and preferences with Legion WFM's multi-location optimization process.

## Benefits

- Automatically match business needs with employee skills and preferences: Employees indicate their scheduling preferences, and Automated Scheduling intelligently matches their skills and preferences to your labor needs—96% of the time.
- Unburden managers: Reduce scheduling time by 50% while maintaining oversight and control.
- Increases 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: 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 delivered automatically. Give employees more control with automated self-service shift swaps and shift claims and the ability to define when, how much, and where they want to work and the option 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—is used by 88% of employees weekly.

Automated Scheduling makes it simple to generate a superior schedule automatically with just one click. Legion's cutting-edge artificial intelligence (AI), unlike legacy solutions, processes hundreds of permutations, learns constantly, and is built using precise ML-generated 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 Legion 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. It enables businesses to maximize labor efficiency and employee engagement simultaneously. The 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](#).