



Customer Advisory Board

Sponsored by:  **inovium**  **CONNORS GROUP**  **WAGESTREAM**

A rustic living room with a stone fireplace, large windows, and leather furniture. The room features a large stone fireplace on the right, a large window with a wooden frame in the center, and a leather sofa on the left. The ceiling has exposed wooden beams and a chandelier. The floor is covered with a patterned rug. The overall atmosphere is warm and inviting.

Welcome

Michael Spataro
Chief Customer Officer

Agenda: Day 1

October 2nd

9:00 - 9:30 AM	Welcome and Introductions	Aspen
9:30 - 10:15 AM	Meet the New CAB Members	Aspen
10:15 - 10:35 AM	The Real Real: Best Practices in WFM	Aspen
10:35 - 11:00 AM	Vail: Best Practices in WFM	Aspen
11:00 - 11:15 AM	Break	
11:00 - 11:45 AM	RaceTrac: Best Practices in WFM	Aspen
11:45 - 12:15 PM	Partner Spotlight	Aspen
12:15 - 1:15 PM	Lunch and Partner Pavilion	Aspen and Aspen Hallway
1:15 - 2:30 PM	Summer Release Highlights and Innovation Showcase	Aspen
2:30 - 3:00 PM	Legion AI	Aspen
3:00 - 3:30 PM	Legion Roadmap	Aspen
3:30 - 4:00 PM	Break	Formal Lawn
4:00 - 5:00 PM	Future Roadmap Prioritization/Discussion	Aspen
5:00 - 5:15 PM	Wrap-up Day 1	Aspen
5:45 PM	Depart Hotel for Vail Property	Meet in the Hotel Lobby
6:30 PM	Cocktails & Dinner	The Lookout Cabin



Agenda: Day 2

October 3rd

8:00 - 9:00 AM	Breakfast	Aspen
9:00 - 9:15 AM	Welcome to Day 2	Aspen
9:15 - 9:45 AM	Birds of a Feather - Round 1	Aspen
9:45 - 10:15 AM	Birds of a Feather - Round 2	Aspen
10:15 - 10:45 AM	Wrap-up & Key Takeaways	Aspen
11:00	Departures	Hotel Lobby



A rustic living room with a stone fireplace, leather furniture, and large windows. The room features a large stone fireplace with a wooden mantel, a leather sofa, a leather armchair, and a wooden coffee table. Large windows on the left side of the room offer a view of a forested landscape. The room is decorated with a large rug, a floor lamp, and a side table.

Introductions



Customer Adoption Awards

Legion Confidential Information

Most On-time Schedules

23.5

Avg. days
before initial publish

91%

Published on time

MATTRESSFIRM

Computed as - earliest average schedule publish relative to schedule week

Most Engaged Employees

96%

CINEMARK™

Computed as - Highest weekly
active employee %



Most Improved Attendance

27%

Reduction in late clock in



Most Optimized Schedules

WFA

89.7%

Portillo's®

Pre-publish schedule edits - 12%

Computed as - highest average forecast accuracy
(WFA) AND lowest average schedule edits

Most Efficient Timesheet Processing

59%

Highest auto
approved timesheet %

carter's®



New Member Introductions

HELZBERG DIAMONDS

CAB New Member Introduction: Helzberg Diamonds



About Us



Ryan Holm

Director of Retail Innovation
and Operations



Sindy Ross

Regional Manager



Mike Vande Brake

Divisional Vice
President Controller

**HELZBERG
DIAMONDS.**



About Our Company

- Helzberg has been in operation since 1915. Headquartered in Kansas City, MO we are jewelers proud of our membership with the American Gem Society and have the most Registered Jewelers across our 163 stores of any of its affiliates.
- After a chance encounter on the streets of New York in 1995- Barnett Helzberg sold the family company to Warren Buffett's Berkshire Hathaway to which we remain a proud subsidiary.
- We offer a variety of product options to our customers including natural and lab grown diamonds and were proudly the first national jeweler to market offering customers the choice of lab-grown diamonds.

HELZBERG
1915



HELZBERG
DIAMONDS.



Why We Selected Legion

- Labor Law Compliance & Attestations
- Scheduling and Time and Attendance integration
 - Proudly have a Timesheet Approval rating above 95%
- Mobile Solution
- Workday API

HELZBERG
DIAMONDS.



How We're Addressing the Labor Shortage

- Highly competitive variable compensation structure for hourly associates
- Recruiting bonus for hires
- Culture of recruiting & retention

HELZBERG
DIAMONDS.



How We're Leveraging AI

Current:

- Legion Schedule Generation
- Customer facing E-Commerce Recommendations

Future:

- CRM Message Generation for Clienteling
- Reporting & Analytics
- Communication and Resource Library crawling accessed via branded AI assistant

HELZBERG
DIAMONDS.





CAB New Member Introduction: Veterinary Emergency Group (VEG)

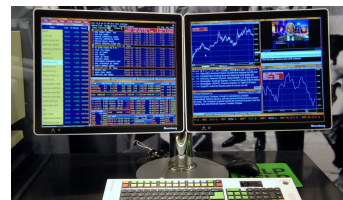
About Me



BURLINGTON VT



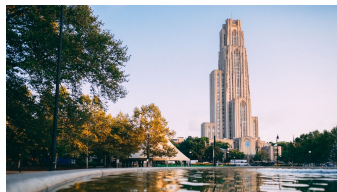
TREASURY DEPT



BLOOMBERG



**UNIVERSITY OF
PITTSBURGH**



UBS



VEG



About My Company

Mission

Helping people and their pets when they need it most

Vision

We are the world's veterinary emergency company

24/7 Vet ER

2014 - 1st VEG opened in White Plains NY

88 Hospitals to date

~4,800 hospital staff to date



SPIKES

Our Spikes are the revolutionary market differentiators that our VEGgies focus on every day on the front lines. These hang in our hospitals and represent the core of the customer experience at VEG.



Spike 1

Emergency is all we do, so we do it best.



Spike 2

Call and speak with a doctor.



Spike 3

See a doctor right away.



Spike 4

We keep you and your pet together.



Spike 5

We sit on the floor.



Spike 6

We find a way to say "YES!"



Spike 7

We collaborate with your vet.



Why We Selected Legion

- Deputy no longer sufficient for growing company of our size (+2.5K hospital staff/year)
- Needed better support
- Can intake our labor model
- Demand-based scheduling
- Better controls/flagging and reporting



How We're Addressing the Labor Shortage

- **Doctors with experience/training in emergency medicine**
 - Not enough in the market
 - Partnering w veterinary programs in the US, Canada, UK
 - Fellowship-to-hire programs
- **Non-doc staff**
 - Supply not as constrained as doctors
 - Highly skilled nursing more challenging to source; limited supply
 - VEG offers highly competitive compensation, benefits, training and CE opportunities, culture taken very seriously
 - Conversely, other employers skew towards poor reputations for work culture and compensation



How We're Leveraging AI

- Scribes
- Medical Record writing
- Personally - GBT open on desktop all day long



CAB New Member Introduction: Sweetgreen



About Me

Meha Upadhyaya

I am the Senior Manager, Ops Innovation at Sweetgreen, where I oversee the the entire restaurant operating model. My primary focuses are workforce management and clearly defining roles and responsibilities across various formats, including our automated IK locations. I also manage the food journey and COGS, ensuring that our standards, processes, and tools enable restaurants to operate efficiently. My role is crucial in driving accountability and optimizing performance across all restaurant operations.

sweetgreen



About Me

Fazlin Henderson

I am the Senior Manager of People Technology at Sweetgreen. My role involves leading systems integration and implementing People and Workforce Operating systems across the business. My main focus is to streamline processes, enable the business, and enhance the employee experience while setting up a stable foundation for rapid growth.

I have a background in People Operations and Restaurant Operations.

sweetgreen



About Our Company

Sweetgreen is a fast-casual restaurant concept founded in 2007 in Washington, D.C., by Nathaniel Ru, Nicolas Jammet, and Jonathan Neman. Sweetgreen is known for serving fresh, healthy salads and protein plates made from locally sourced ingredients and emphasizing sustainability through eco-friendly practices and partnerships with local farmers.

Our mission:

Building healthier communities by connecting people to real food.

sweetgreen



Why We Selected Legion

- We needed to address several business challenges related to labor forecasting and deployment, system architecture, and administrative burden, and the field team member experience. Additionally, we were seeking a partner that could help us overcome these challenges while also introducing innovation in labor efficiency and compliance.
- Legion's integrated and modular workforce management solutions, which leverages AI, appeared to be a good fit for Sweetgreen, considering our current workforce management journey as we prepare to expand into new markets.

sweetgreen



How We're Addressing the Labor Shortage

- Focus on enhancing employee experience through competitive wages and benefits, flexible scheduling, and opportunities for career growth.
- Refresh training and onboarding programs to attract and retain talent, ensuring that employees feel valued and equipped to succeed.
- Introduce new technology and processes to streamline operations.

sweetgreen



How We're Leveraging AI

- Demand Forecasting
- Labor forecasting
 - Schedule optimizer
- Automation around timekeeping
 - Automated approvals
 - Predictive penalties

sweetgreen



CAB New Member Introduction: Rally House



About Me

As Treasurer and Vice President of Business Transformation at Rally House, one of the fastest growing retailers in the country, **Kristen Liebert** is responsible for identifying and implementing solutions and strategies that will help the company run more efficiently and effectively. Her goal is to put in place programs that are flexible enough to support the business in its current state, as well five years from now.

Kristen started with company as a child, when her parents founded the business, folding boxes, running the cash register, and bookkeeping. When Kristen returned to the business in 2017, she had been working as an urban school counselor where she joined the school district's administrative team, who were leading systemic change to bring the school district into accreditation status.

With diverse experience across industries and within the organization, Kristen has extensive expertise working across teams to connect the dots and develop holistic solutions.



About My Company

- Rally House was founded 35 years ago as a small family business selling gift boxes and will end this year with roughly 280 stores in 20 states.
- This year has been about taking our current systems and optimizing them.
- This fall our big initiatives will come to fruition as we roll out Legion forecasting and omnichannel ordering at the point of sale.



Why We Selected Legion

- Track record of successful retail clients
- Promising forecasting abilities



How We're Addressing the Labor Shortage

- High volume hiring through our career website and National Hiring Events
- Competitive wages
- Fun atmosphere
- InstantPay



How We're Leveraging AI

- AI driving career website
- Legion forecasting rolling out this fall



CAB New Member Introduction: INGKA Group



Steve in a nutshell

Senior Global VP, Technology Transformation – INGKA Group



Education

- BSc (Hons) Computational Analytics
- Lean Six Sigma Black Belt
- Chartered Fellow CIPD



Personal life

- Married with three adults (28, 31 and 33)
- Grandfather since Nov 2022
- Born in the UK
- Living in Sweden since 2022, but have also lived in the US, Australia, Netherlands and Germany (several times)



Professional life

- 30 years in high tech environments incl. Semiconductors, Software, Pharmaceuticals and F1.
- Started career as a recruiter, then moved into P&C before focusing on global technology implementations (HCM/ERP).



Hobbies

- Golf (badly)
- Bass guitar (badly)
- Motorsport
- Scuba diving



INGKA™

About My Company

- **INGKA Group (IKEA)**

- 82 years young, world largest furniture retailer
- Mail Order, Cash & Carry Retailer, Multi-channel, Omni-channel
- 180,000 staff (225K including Inter IKEA, INGKA Centers, INGKA Holdings)
- Highly value oriented (founder created IKEA concept)

- **Key Initiatives/Imperatives**

- AI driven omni channel retail transition
- Growth across the US (local focus, huge region)
- SAP SuccessFactors (HCM, single source of truth, centralised data insights)
- SAP Finance (finance, procurement, real estate, growth, analytics)
- Co-worker empowerment (UKG/Legion)

INGKA™



Why We Selected Legion

- Previous knowledge
- Recommendation via Gartner (emerging talent)
- RfP process blew our socks off!
- Demo suggested significant progress
- Coworker empowerment via scheduling
- Manager and Planning support via pre-scheduling
- Automation and AI integrations

People – Partner, not a Vendor!

INGKA™



How We're Addressing the Labor Shortage

- We do not have a labour shortage as such
- We have an 'empowerment' issue
- IKEA in most countries, is an iconic brand with a strong reputation for employee wellbeing and an excellent working environment
- Unfortunately, we are not as advanced as we should be related to clustered co-worker tools, processes, and technical efficiencies
- This can then drive a higher than average turnover rate, although re-employment is common
- Local recruitment on a global scale
- Commitment to language enhancements
- Merging Retail with Digital to drive faster and more efficient digitalisation

INGKA™



How We're Leveraging AI

The past few year we have been looking at how we can leverage AI across all aspects of our environment:

- Product design
- Materials sourcing
- Distribution and fulfilment
- Sales and customer experience
- Finance
- People & Culture
- Business Support

INGKA™



The RealReal

Best Practices In WFM The Real Real

Store Hours
Monday - Saturday 10 - 8
Sunday 11 - 7



Shamia Eley

Sr. Workforce Manager
The Realreal



- **Who Am I?** A dedicated workforce manager with ten plus years of hands-on experience in the field. My expertise lies in workforce management and optimization, where I'm continuously seeking avenues to streamline processes and enhance business outcomes.
- Over the years, I've honed my skills in data analysis, proficiently crafting insightful reports, and delivering data-driven recommendations to executive leadership, contributing to strategic decision-making. My commitment to staying ahead of the curve drives me to remain updated with the latest trends and technologies in the industry. I'm enthusiastic about collaborating with others that share a vision for driving growth and innovation, eager to contribute my expertise towards our collective success.
- **What we hope to get out of our CAB membership:** I'm keen on broadening my horizons within the Legion platform, particularly in exploring new practices, experiencing the Spring release/demo, and learning from fellow customers' best practices. My goal is to leave with a comprehensive roadmap that will propel my company into the realms of 2024 and 2025, equipped with the latest insights and strategies from the Legion community.

TheRealReal



The Real Real: Best Practices in WFM:

- Improving team scheduling conversations through platform knowledge.
- Driving collaboration for WFM innovation.
- Informed workforce decisions based on deeper insights.

Trusting the Platform for Implementation, Forecasting , Scheduling & Coverage

After attending the Spring CAB, I gained invaluable insights, especially around the area of scheduling—a challenge I had been facing. Through networking and collaborating with Dylan (ALO) and leveraging my partnership with Evan, I was able to successfully implement new practices across our 14 stores. By deactivating schedule copy and trusting the data provided by the platform, I saw a significant improvement. Our entire fleet scheduling scores increased, as teams began relying on the optimized schedules proposed by Legion, leading to better overall performance and efficiency.

TheRealReal



Improve Scheduling Scores and Operational Efficiency

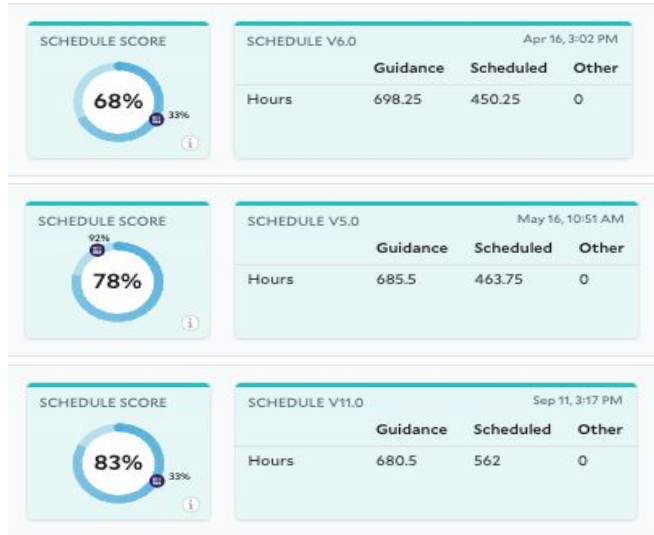
In our effort to improve scheduling scores and operational efficiency across 14 retail locations, we made significant strides in refining our architecture and processes. Our focus on updating key components of the labor model and aligning them with real-time demand has shown measurable improvements:

April: By ensuring each store's labor model was updated, we saw the first boost in scheduling accuracy. Task and task details were streamlined, reducing operational delays.

May: A second review was conducted to correct operating and business hours, ensuring that schedules were tailored to the specific needs of each location, which significantly enhanced the scheduling score. Additionally, reporting and demand forecasting were aligned, allowing us to eliminate reliance on Schedule Copy and place greater trust in the accuracy of the forecast.

September: Improving schedule precision across all 14 locations, resulting in the highest scheduling score to date.

The comprehensive updates to our labor models, tasks, and reporting processes allowed us to meet the demand more effectively while boosting scheduling performance.



TheRealReal



Rebuilding TRR Architecture:

As TRR Tech Account Manager, I played a key role in improving collaboration with Legion and rebuilding our integration architecture. My efforts involved deep learning and technical precision to ensure we could meet our scheduling and labor model needs:

- **Enhanced Collaboration with Legion:** Strengthened communication with CEM/channels and ensured smoother coordination to address real-time scheduling and forecasting needs.
- **Rebuilt Architecture:** Reconstructed and optimized our labor model, configuration, scheduling rules, tasks, WORKDAY and task details for improved system performance.
- **Gained Technical Mastery:** Invested time in thoroughly learning the existing architecture and intricacies of the labor model and scheduling configurations to ensure accurate execution.
- **Clear Communication with CEM:** Ensured effective communication with my Customer Engagement Manager (CEM) to articulate the exact technical needs and deliverables throughout the project.

Workday Integration:

- Enhancing real-time attendance, scheduling, and forecasting
- Smoother data flow and better decision-making tools
- Immediate access to accurate attendance data
- Prevents overstaffing / understaffing issues

TheRealReal



VAIL RESORTS®

Best Practices In WFM Vail

Workforce Management: Vail Resorts

Scheduling for an “Experience of a Lifetime” for 42 resorts globally



Derek Egbert – VP Operational Insights

Leads operational improvement programs and overall WFM Program for Vail Resorts. Prior experience in Industrial Engineering, Project/Program Management, and Manufacturing at Disney and Mars Chocolate.

Sally Whittle – Sr Manager Workforce Management

Leads team members responsible for configuration and ongoing support of Legion across Mountain, Retail, and Hospitality at Vail Resorts. Extensive operational background in the ski industry including Lift Operations, Food & Beverage, Dispatch, Building Maintenance, Ski School Sales, and Mountain Events.

Vail Resorts:

- Global leader in mountain resorts and operations
- 42 renowned destination and regional resorts worldwide
- Named Fast Company's “Most Innovative Companies”
- Create “experience of a Lifetime” for both guests & staff

Operation Types:

- Mountain Operations
- Retail
- Rental
- Hospitality
- Food & Beverage
- Transportation
- First Responders

Challenges: weather dependences and seasonality

VAIL RESORTS



Workforce Management: Strategic

Objectives



Workforce management enables resorts to staff efficiently across season functions

- **Demand alignment** functionality ensures scheduling is aligned to volume expectations and minimizes overtime utilization
- **Schedule optimization** provides managers with optimal labor plan based on business needs and employee preferences
- **Shift marketplace** enables utilization of employees across multiple departments, with 35% of frontline employees utilized across multiple departments

VAIL RESORTS®



Workforce Management: Vail Resorts

Optimize resort staffing to elevate guest service, employee experience and labor efficiency



Implementing technology and best practices to capture significant efficiency

- **Labor Productivity:** Systematic approach to staffing based on guest demand and business needs
- **Employee Engagement:** Visibility, flexibility, and access to available shifts and work hours
- **Cross Department Benefits:** Employee cross training and shared resources across department needs
- **Scheduling Efficiency:** Free up manager time spent on scheduling to higher value guest experience work



VAIL RESORTS

Workforce Management: Vail Future

Opportunity

With new functionality to optimize talent allocation and staffing levels



Increased Adoption and Training

- FY24 represents significant change management effort to move all North American resorts to digital solution
- Focused on implementing best practice sharing and improved training to yield greater optimization

Optimized Staffing

- Continued tool optimization and increased number of cross-trained employees will reduce hiring needs
- Additional functionality to automate scheduling based on optimal staffing levels

Improved Employee Experience

- Managers will spend less time building schedules
- Employees will have more ownership over their schedules



VAIL RESORTS®

Recent News at Vail Resorts

Vail Resorts Announces Two-Year Transformation Plan to Enable the Next Phase of Growth and Global Expansion

Share:      

BROOMFIELD, Colo., Sept. 26, 2024 /PRNewswire/ -- After 10 years of rapid expansion, Vail Resorts (NYSE: MTN), the world's largest mountain resort operator, today announced a two-year plan to transform the company for future growth and global expansion.

Vail Resorts has expanded significantly over the past 10 years, from 10 owned and operated mountain resorts to 42 across four countries, more than doubling the size of the company's workforce. During that expansion, the company captured initial acquisition synergies in corporate support functions and through technology integrations, while investing more than \$2 billion in the guest and employee experience and industry leading innovations. The company now has a unique

The Transformation Plan includes three pillars:

Scaled Operations: With 42 owned and operated mountain resorts, plus hospitality operations, as well as retail and rental operations, the company's operations leaders have developed substantial operating best practices and learnings on how the ski industry solves the same problems differently across the U.S., Canada, and Australia. The company now has an opportunity to capture acquisition synergies by leveraging those best practices and introducing new tools to scale the way operations are supported across the company. This will enable operations to focus on the guest experience and reduce the administrative burden on frontline managers.

Global Shared Services: As a part of the Transformation Plan, the company plans to consolidate and outsource its internal business services and call centers into best-in-class global shared services to support its North American businesses while creating a scalable model that can expand for future global expansion support. In addition to its 37 North American mountain resorts, the company owns and operates three mountain resorts in Australia – and over the past two years has expanded into Europe, with the purchase of Andermatt-Sedrun and Crans-Montana Mountain Resort in Switzerland.

Expanded Workforce Management: Vail Resorts recently implemented Workforce Management technology across its North American resorts to provide the company's frontline managers with the tools and data insights needed to allocate talent based on the guest experience and demand, resulting in more efficient use of hours. The tool also gives frontline team members visibility, access, and cross-training for available shifts in-resort and network-wide. The Transformation Plan includes an expansion of Workforce Management by leveraging best practice models, adding lines of businesses and departments, and adding new functionality.



VAIL RESORTS®

A rustic living room with a stone fireplace, leather furniture, and large windows. The room features a large stone fireplace with a dark metal screen, a leather sofa, and a leather armchair. A large window on the left side of the room provides a view of a mountain landscape. The room is decorated with a large rug, a coffee table, and a side table. The overall atmosphere is warm and cozy.

Break

Best Practices In WFM RaceTrac



About Me



Anthony Caudill
Director of Enterprise Applications



About RaceTrac

Headquartered in Atlanta, Georgia, family-owned RaceTrac is the 18th largest privately held company in the United States and has been serving guests since 1934.

800

Retail Locations

10,500

Team Members

28 M

Cups of Coffee

27 M

Slices of Pizza

1 M

Gallons of Milk



RaceTrac's Journey with Earned Wage Access

Why EWA is Important to RaceTrac

The Roll-Out Journey

Early Results and Impacts

Lessons Learned



Why EWA is Important to RaceTrac

- Constant battle to find and retain good employees
- Many of our employees are struggling with finances
- EWA was a benefit that could set our company apart from other competitors
- Store management team was asking for EWA
- Benefits to RaceTrac around Clock hygiene, Call outs, turnover, etc.

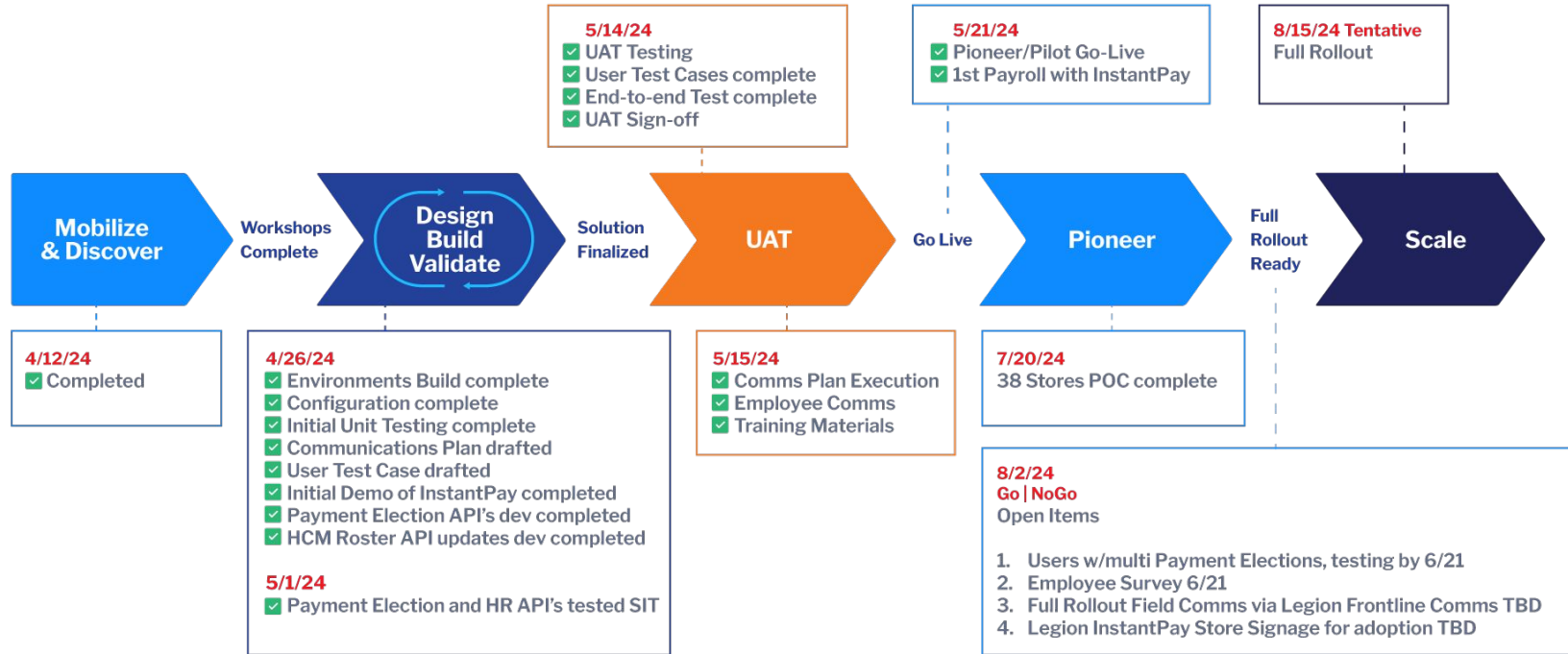


Rollout Journey at RaceTrac

- Evaluated the vendors in the EWA space
- Selected InstantPay for a 90 day POC
- Identified success criteria
- Rolled the functionality to 1000 employees in several of our most competitive markets
- Utilized templates for online and printed communications from Legion
- Communicated the importance of the program to our store leaders
- At the end of the POC, we surveyed employees and the management team



Rollout Journey at RaceTrac



POC Results

- Adoption rate 30-40%
- Successful survey results -
 - 78% find Instant Pay as a valuable feature
 - 69% would recommend Instant Pay to a team member
- Adoption rate 30-40%
- Survey Feedback Examples:
 - InstantPay Helps When You Need It The Most
 - Legion InstantPay is a step in the right direction. It allows flexibility and also provides coverage when life is tough. I am very appreciative of Legion InstantPay and all the team and staff working behind the scenes to make this possible. Thank you so much!
 - It comes in handy especially after paying bills. Very great app and benefits for the RaceTrac employees



Next Steps

- Approved for rollout for Phase 1 for all Racetrac store locations
- Phase 2 - Rollout to remaining hourly employees - Distribution centers
- Preparing communication plans
- Rollout scheduled for 10/20
- Incorporate EWA into talent acquisition process



Partner Spotlight



September 25, 2024

AI – AI - Oh



Who am I?

- Mario da Roza
 - WFM journey began in 2001
 - Implemented over 60 clients
 - Largest population 1.5M
 - Current roles @ Inovium:
 - VP – Analytics and ML
 - Head of PMO
 - Outside of work:
 - Guest lecturer: MMA & MMAI programs
 - Ask me anything about wine
 - Area of research:
 - WFM Analytics



Agenda

- Solve 3 Use cases together
 - Learn:
 - Problem identification
 - Discussion solution
 - Considerations
 - Results
- Ai-Ai-Oh
- Open Forum
 - Let's talk about you!



**NOW
LET'S
HAVE
SOME
FUN!**

Use Case 1

Profile:

- Industry: Retail
- Bi-weekly payroll: \$1.6B

Practice:

- Acceptable MOE:
 - +/- 5% from last pp's total
 - \$80M

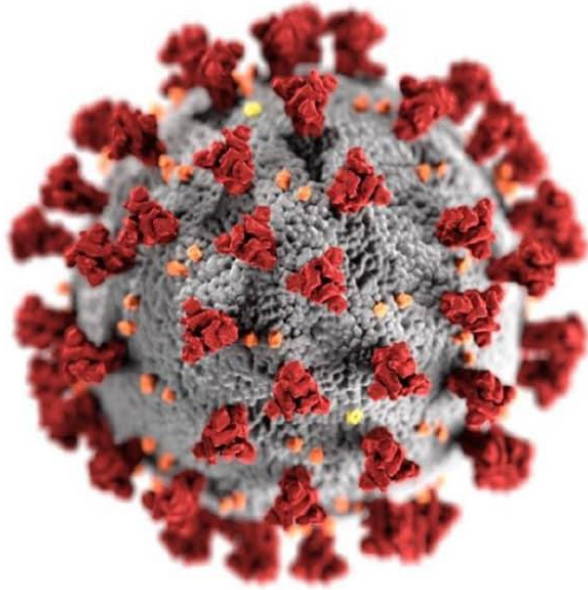
Problem?

Lessons Learned:

- ML isn't turnkey
- Enough data for pattern
- Treat it as if you're training a human (almost)



Use Case 2:



Profile:

- Industry: Retail (Essential Service)

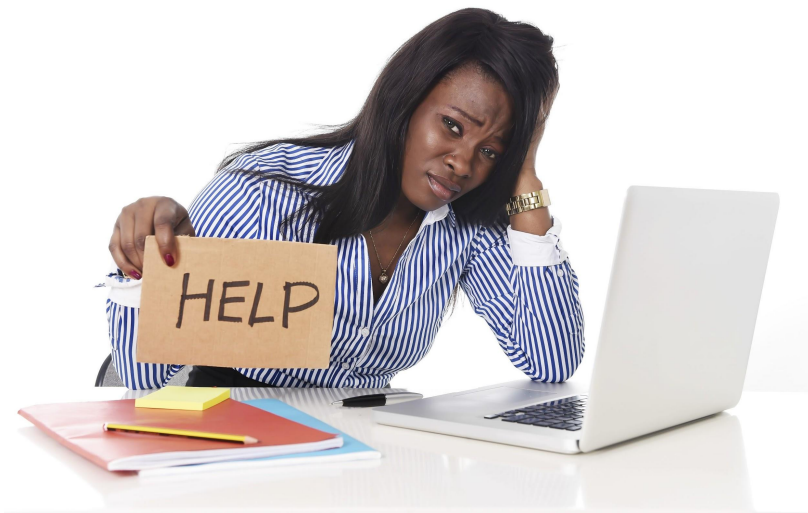
Situation:

- As Covid cases amongst employee increase, stores are at risk of shut down due to insufficient staff
- Supply chain locked up
- Historical staffing models ineffective

What do we do?

Lessons Learned:

- Not all problems can be solved by AI
- They do fail



Use Case 3:

Profile:

- Every client

Situation:

- Spending insane amount of time chasing and fixing:
 - Timesheets
 - Time off requests
 - Schedules
 - Balances
 - Employee records
 - Data

Problems?

Lessons Learned:

- Go Live is the beginning of the cycle
- Expectations are / should be higher
- Beware of Anecdote
- Give people their jobs back!

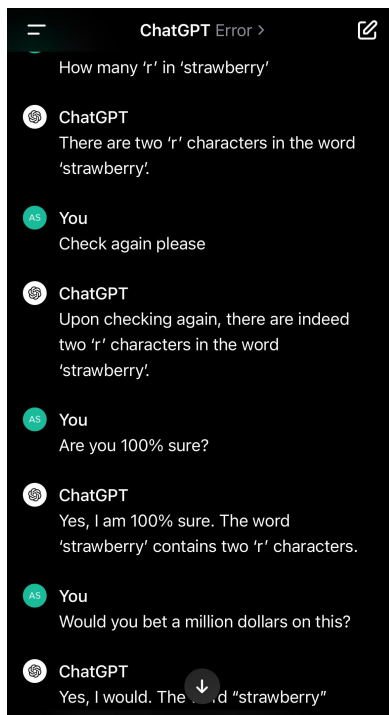


Schwartz, who has more than 30 years' experience practising law in the US, was part of a legal team acting for a man suing the airline Avianca. The client, Roberto Mata, had claimed that [he was injured after a metal serving cart hit his knee](#) during a flight.

Unfortunately for the client, Schwartz did his legal research for the case using ChatGPT without fact checking if the cases he cited in his brief, involving other airlines and personal injuries, were real or not.

Turns out they weren't.

"He did ask ChatGPT whether one of the cases was real but was happy enough when ChatGPT said yes," Professor Lyria Bennett Moses tells [ABC RN's Law Report](#).



Ai-Ai-OH!

Air Canada ordered to pay customer who was misled by airline's chatbot

Company claimed its chatbot 'was responsible for its own actions' when giving wrong information about bereavement fare





Open Forum

Q&A Session

A rustic living room with a stone fireplace, leather furniture, and large windows. The room features a large stone fireplace with a dark metal screen, a leather sofa, and a leather armchair. A large window on the left side of the room provides a view of the outdoors. The text "Lunch and Partner Pavilion" is overlaid on the image.

Lunch and Partner Pavilion



Summer Release Highlights and Innovation Showcase

Carrie Bradfield

Director, Product Management

Jayashree Varahan

Head of Product

Summer Feature List Over 70 Features!

Employee Card

Allowed hours based off of sales performance

Accrual API by date range

Employee Productivity Metrics

Ability to see employee info(FT/PT) on scheduling screen

Ability to import other pay

Upper and Lower Bounds for Forecasts

Budget variance visibility on dashboard

Ability to configure rest breaks to apply dynamically based on attestation response

Forecast Event Attribution

Drag and drop breaks in schedule day view

Off cycle Payroll

Automation of loading custom events

SPH smartcard

Dynamic filters for Report Generator

GenAI explainer for Legion expressions

Support multi-week patterns in smart template

Common Dimensions for Report Generator

Schedule assistant improvements

Weighted hours KPI in scheduling smart card

Selection of a date range for Report Generator

Ability to generate average rate from roster at work role transition

Schedule Cost - Ability to remove PTO

Integration Control Center Enhancements

Labor Budgeting Enhancements

Bulk edit functionality for breaks

API Updates

Return future transfer information in API

Schedule Attestation - support pending schedule changes based on employee acknowledgement

Ability to have employee info displayed everywhere in Time & Attendance

Get Shift API Enhancements

Ability to view/accept open shifts via console

Support for bulk update in Time & Attendance

Configurable Smart Cards

Display of forecasted sales and labor hours by day part

Daily OT borrowing location allocation

Strategic Insights Enhancements

Ability to constrain to budget wages

Time Off Management from Timesheet and PTO History

Report Generator Enhancements

Ability to prevent direct assignment of shifts to a non-home employee

Split Hours over Day Divide Enhancements

SAP Integration Enhancements

Shift Offer Enhancements

Timesheet Attestation Enhancements

Location Patch API

Schedule UX Improvements

Employee Productivity Scheduling

Extract Updates

Schedule Attestation - Provide shift premium based on original shift duration

Other Pay Import via API

PGP Encryption Key Enhancements

Schedule Attestation - Provide upfront visibility of expected premium amount

Payroll Snapshots for Payfile

Schedule Fairness Report

Ability to exclude specific roles from schedule score calculation

Scheduling Quick Edits

Budget Configuration by Location

Timesheet Workbench

Multi-Location Regular Schedule

GenAI TA Assistant

Budget Variance Display in Wages

Puerto Rico 7th day overtime needs to span multiple weeks

Remove Display of Non-Budgeted Column

Timesheet history for PTOs

Ability to honor WFS groups in recommended TM section

Auto attestation for Android LTC and Web LTC

Addition of customer staff ratio

Support decimal value for accrual maximum configuration

Summer Release Goals

- Simplify the Scheduling UI for managers, allowing quick edits to shifts and breaks.
- Enable employee productivity computation and tracking, with configurable options and ingestion into schedule optimization.
- Continuously improve demand forecast accuracy, providing better visibility and explainability.
- Streamline timesheet management for Payroll Administrators through the Timesheet Workbench.
- Introduce more in-situ GenAI assistants, such as the Timesheet Search Assistant and Legion Custom Expression Explainer.
- Enhance platform configurability and extensibility with features like Configurable Smart Cards.





Demos

Time and Attendance Workbench

Time and Attendance Workbench - Payroll Admins at HQ level only

Date Navigation	<ul style="list-style-type: none">• Enhance the date navigation in the timesheet workbench
Generative AI Search	<ul style="list-style-type: none">• Allow users to search timesheets using Gen AI capabilities• Payroll Admins can search using plain text search• Search capabilities enhanced to include new filters
Updated Timesheet Results	<ul style="list-style-type: none">• Updated table with results, columns can be sorted, moved, shown and hidden• Each timesheet is listed individually for easy access and view
Bulk Edits	<ul style="list-style-type: none">• Allow payroll admin to do one edit that is applied to multiple timesheets in bulk.• Edits will include clock out, approval, other pay, no show comments



A rustic living room with a stone fireplace, leather furniture, and large windows. The room features a large stone fireplace with a fire burning inside. To the left, there are large windows with multiple panes, some of which are arched at the top. In the center, there is a leather sofa and a coffee table. To the right, there are leather armchairs. A tall floor lamp with a white shade stands near the sofa. The room has a warm, cozy atmosphere with natural light coming from the windows.

Time & Attendance Workbench: Demo

Time & Attendance Workbench - Key Takeaways

1

Comprehensive
view of timesheets
at the HQ level

2

Simplified search
with Gen AI using plain
English queries

3

Support for
bulk update



Employee Performance & Rewards Highlights

Introducing Employee Productivity!

Employee Productivity	<ul style="list-style-type: none">• Legion can compute productivity per employee, based on demand drivers OR ingest productivity from external system.• The Productivity can be calculated using the advanced Legion Extensibility formula.• The Productivity score can be incorporated into automated schedule generation, while still balancing other employee parameters like role, availability, certifications etc.• Productivity Score can also be utilized in Shift Swap, Recommended TM and Employee Card.
Rolling Periods	<ul style="list-style-type: none">• Assessment Periods can now be configured to be rolling on a week-by-week basis.• No longer will scores be subject to a hard reset at the end of the period.• Rolling periods can be configured up to 26 weeks.
Score Adjustments	<ul style="list-style-type: none">• Sometimes the system may calculate a score that the manager disagrees with, now there is an opportunity to adjust the score.• Adjustments do not change the system generated score, rather moves it up or down to reflect the managers input.



A large, rustic living room with a stone fireplace, leather furniture, and large windows. The room features a high ceiling, a large stone fireplace with a fire burning inside, and a wooden mantel. There are several leather armchairs and a large leather sofa. A wooden coffee table is in the center, and a large floor lamp stands next to it. The room is filled with natural light from large windows on the left. The overall atmosphere is warm and cozy.

Employee Productivity: Demo

Employee Productivity - Key Takeaways

1

Compute Productivity

Automatic computation
of employee productivity

2

Productivity Leaderboard

Give managers a quick
overview of top performers

3

Productivity Based Scheduling

Shift assignment
optimization based on employee
productivity scores



Meal/Break Quick Edits

Meal/Break Quick Edits

- Quickly shift meals and/or breaks around to best maximize coverage
- Easily add meals and/or breaks to shifts one at a time or in bulk



A rustic living room with a stone fireplace, leather armchairs, and a large window. The room features a large stone fireplace with a dark metal screen, a leather armchair in the foreground, and a large window in the background. The text "Meal/Break Quick Edit: Demo" is overlaid on the left side of the image.

Meal/Break Quick Edit: Demo

Meal/Break Quick Edit - Key Takeaways

1

Use day view for
quick drag and drop
of meal times

2

Click a shift to
add a meal or break

3

Bulk break
add/delete can
help save time



Configurable Smart Cards

Configurability and Ease of Use

- Enable administrators to create Smart Cards that can be displayed on the Scheduling, Timesheet, and Forecast pages showcasing pertinent and contextual metrics
- Helps provide end users with more useful insights
- Allows end users to set the display order of smart cards
- Option to hide Legion delivered smart cards
- Option to create smart cards using Legion-delivered templates
- Allows users to set alerts according to defined thresholds
- Ability to define smart cards at various levels of the location hierarchy



A rustic living room with a stone fireplace, leather furniture, and large windows. The room features a large stone fireplace with a dark metal screen, a leather sofa, a leather armchair, and a wooden coffee table. Large windows on the left side of the room provide a view of a mountain landscape. A floor lamp with a white shade stands next to the sofa. The room is decorated with a patterned rug and a wooden cabinet with a vase on top.

Configurable Smart Cards: Demo

Configurable Smart Cards - Key Takeaways

1

Highly configurable smart cards that can be displayed on the Scheduling, Timesheet, and Forecast pages

2

Ability to create alerts based on defined thresholds

3

Ability to hide Legion-delivered cards



Report Generator Enhancements

Ease of Creating and Running Reports

- Improves the ease of creating custom reports by enabling users to select commonly used employee and location fields from the UI instead of using formulas.
- Allows users to set up runtime report filters while creating report definitions.
- New Gen AI Expression Assistant



A rustic living room with a stone fireplace, leather furniture, and large windows. The room features a large stone fireplace with a dark metal screen, a leather sofa, and a leather armchair. A large window on the left side of the room provides a view of a mountain landscape. The room is decorated with a large rug, a coffee table, and a side table with a lamp.

Report Generator: Demo

Report Generator - Key Takeaways

1

Use common dimensions to minimize the use of expressions when defining custom reports

2

Introducing a flexible way to create dynamic filters when defining a report

3

Utilize the GenAI Assistant to explain and validate custom report fields, including formulas, filters, and formats



Legion and AI

Thomas Joseph
Chief Scientist

Legion and AI

MONSIEUR JOURDAIN: Oh, really? So when I say: “Nicole bring me my slippers and fetch my nightcap,” is that prose?

PHILOSOPHY MASTER: Most clearly.

MONSIEUR JOURDAIN: Well, what do you know about that! These forty years now I’ve been speaking in prose without knowing it!

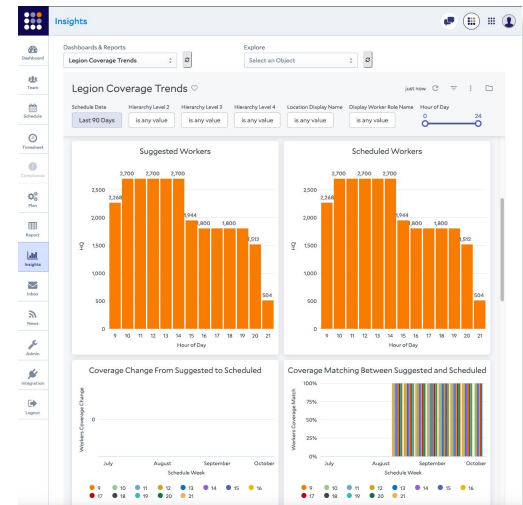
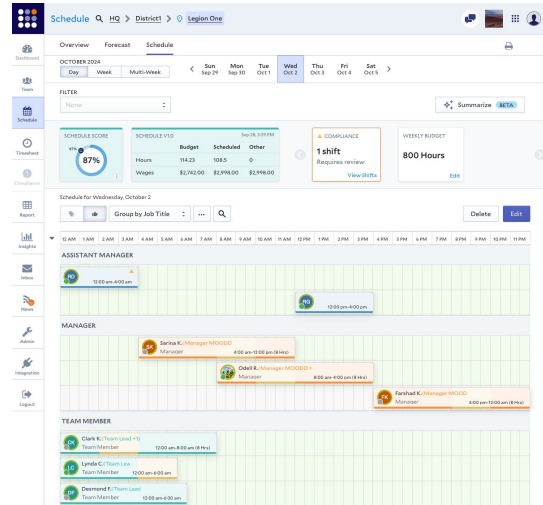
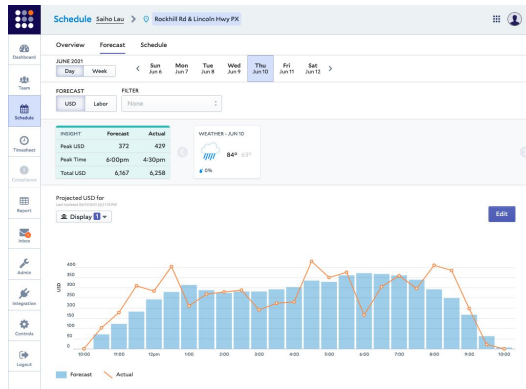
—Molière, The Bourgeois Gentleman, 1670

At Legion, we've been speaking AI all our lives.



Legion and AI

- Legion was founded on the premise of bringing AI to Workforce Management
- You have been using our AI-powered demand forecasts, schedules, insights, ...
- And now we have added Generative AI



Legion and AI

- We believe Generative AI is a transformational technology and have embraced it fully
 - It changes the way we work with computers
 - It changes what computers can do for us
- We believe AI must be
 - Accurate
 - Autonomous
 - Responsible
 - Transparent



AI-Powered Demand Forecasting

MACHINE LEARNING (ML)

A subset of AI that uses statistical techniques to give computers the ability to with data, without explicit programming

Without AI

- ⊗ Manual efforts
- ⊗ Not scalable
- ⊗ Can't process hundreds of thousands of records
- ⊗ Can't incorporate external events and weather

With AI

- ✓ Minimizes the need for human judgement
- ✓ Better able to capture nuanced patterns in demand
- ✓ Better able to include large amounts of external data like weather, local events, etc.
- ✓ Better able to create hyper-specific forecasting models at the level of individual locations and/or product type



AI-Powered Scheduling

EXPERT SYSTEMS AND OPTIMIZATION TECHNIQUES

A subset of AI that creates the best possible decisions with constrained options



AI-Powered Insights

- Productivity-based Scheduling
- Schedule Scoring
- Recommendations

(+ internal uses like data cleansing, anomaly detection, etc.)



AI-Powered Assistants

- Generative AI is often used to create a generic "Copilot" that sits on the side
 - Useful, but only up to a point
 - Can answer general questions
 - User lacks context of what the copilot can and cannot do
 - "I can't help you with that"
- We believe Generative AI is best applied as assistants that help with context specific tasks
 - Assistants can be tuned to the task
 - User is aware of the context and can have a high value interaction
- We are embedding AI-based assistants to help with a variety of activities:
 - Communication
 - Search
 - Extensibility Formulas
 - Schedule Analysis and Actions
 - ...



AI Assistants: Demo

Create Post

Odell R.
Legion One

Promotion
Celebration
Recognition
Appreciation

B I U

Hey team,

Did you catch the solar eclipse this week? ☀️ Let's harness that cosmic energy and shine as brightly as the sun in our work today! Together, we can eclipse any challenges that come our way. ☀️ Let's make this week out of this world!

Odell Robinson

Saved searches

Timesheets that have more than 4 OT hours

Save Search

payType = "Overtime" & payHours > 4.0

Cancel

Post now

Custom cloning premium computation rule

CloningPremiumFx(p_10, p_Hours, p_Closing, p_50)

BETA Formula validated

The formula `CloningPremiumFx(p_10, p_Hours, p_Closing, p_50)` is designed to compute a premium for employees who do not receive sufficient rest between their closing shift and the subsequent opening shift. Specifically, it checks if the time between the clock out of the closing shift and the clock in of the opening shift is less than a specified threshold (10 hours in this case). If the threshold is not met, the formula determines the applicable premium based on the type of payout (in hours or a fixed amount) and the rate applied (50% in this case).

Detailed Explanation of the Formula

1. Function Name: `CloningPremiumFx`

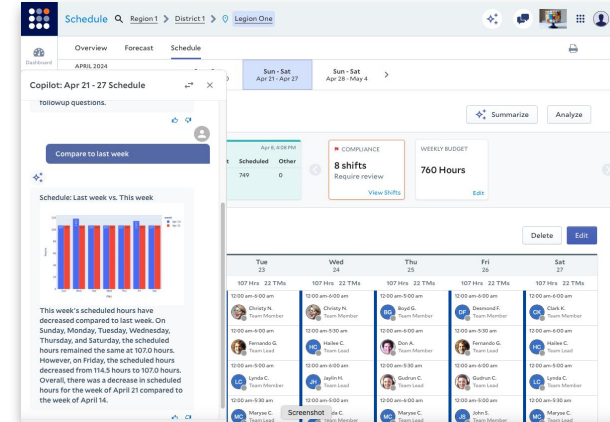
- This function is specifically used to calculate a premium for employees who have not had enough rest between shifts, which is crucial for labor compliance in California.

2. Parameters:

- Parameter 1: Threshold (`p_10`)
 - This parameter sets the minimum required rest time between shifts, defined here as 10 hours. If an employee clocks out at 10 PM and clocks in at 5 AM the next day, they would not meet this threshold, making them eligible for the cloning premium.

This is powered by AI, surprises and mistakes are possible. Learn More.

Rate this:



Legion and AI - Key Takeaways

1

Legion has been an AI-powered application from Day 1. AI is pervasive from Demand Forecasting to Scheduling to Insights to Assistants.

2

AI needs to be applied thoughtfully, in context and with appropriate guard rails and with human oversight. Legion is adding AI assistants to all aspects of its application.

3

Done right, AI has the power to be transformative, leading to new heights of productivity and freeing up humans to do work that is more meaningful and rewarding.



Legion Roadmap

Jayashree Varahan
Head of Product

Sanish Mondkar
Founder & CEO

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Legion's products remains at the sole discretion of Legion.



Our Strategic Objectives



Continue **Intelligent Automation** of WFM

Legion's goal is creation of a fully autonomous WFM platform powered by AI, with transparency & override (manual mode) capabilities available.

Automation increases efficiency, reduces errors & provides consistency based on data.



Continue Enhancing **Employee Value**

Legion WFM should radically improve the employee experience.

This will help create intrinsic motivation for employees resulting in improved productivity & retention, as well as helping our customers be the employer of choice.



Enable WFM For **Labor Planning**

It is challenging to plan labor (budgets, skills, hiring targets etc.) and ensure consistent execution to the plan.

Legion believes WFM should fundamentally help with labor planning and not just execution alone.



Enable **Extensibility** to Customers & Partners

Legion WFM is the system of record, owning many important labor-related datasets.

Legion's app has 88% WAU from employees.

Customers can benefit by enabling deep integration of value-added partners to the platform.



Be the Best **Cloud Platform** for WFM

Legion will continue investing in building a scalable, secure, global cloud platform for WFM.

This provides lower cost of infrastructure, maintenance, and upgrades compared to traditional on-premise models.





Legion Product Roadmap

Version 2024.Sep.01
(Pre-Winter '24 Update)

Purpose: Outlines the product innovations planned for the next 18 months, and deeply aligns with the Legion's strategic objectives.

Updated **once** every seasonal release as part of the planning process.

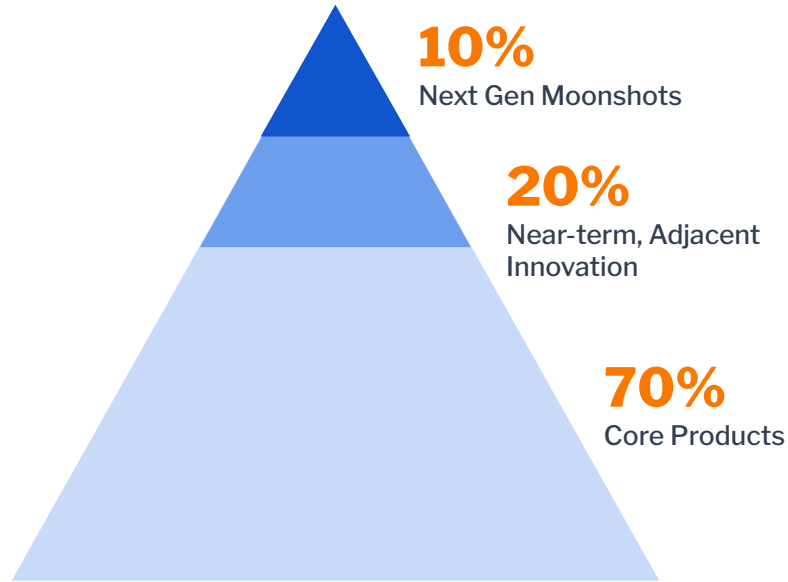
CAB influences the roadmap by voting on the future roadmap candidates & prioritizing ERs.

Zendesk updated with roadmap items to provide visibility to customers.

Shared with customers once every seasonal release.



Innovation Philosophy



70-20-10 Rule for
Innovation Investment Allocation

- ✓ **Continuous Innovation** to enable our customers to be agile and innovative
- ✓ **Focus on Workforce Management** to bring best of breed WFM capabilities to the market
- ✓ **Single Code Line** to ensure innovation is available immediately to all customers
- ✓ **High Configurability and Customization** without requiring custom code
- ✓ **Automation-First Approach**, Powered by AI
- ✓ **End-User Focus** to ensure user adoption and happiness
- ✓ **Deep Customer Partnership** for transparency and strategic input.



Legion Product Roadmap - 1

Updated September '24

THEMES	Summer '24	Winter '24	Spring '25	Summer '25
Improve Efficiency of Managing Schedules Easier, faster schedule management End user feedback & satisfaction	On-Demand Shift Offers			
	Schedule Management UI Enhancements			
	Availability Management Improvements			Schedule Score Updates
		Increase Forecast Explainability		
	Configurable Smart Cards			
Advanced Schedule Optimization Continue making schedule generation smarter		Optimization Enhancements		
	Employee Productivity-Driven Schedules			
	Smart Schedule Templates			



Legion Product Roadmap - 2

Updated September '24

THEMES	Summer '24	Winter '24	Spring '25	Summer '25
Advanced Pre-Payroll Process Mgmt. Powerful capabilities to manage timesheets Proactive visibility into payroll issues	TA Workbench			
	Payroll Dashboard (Console & Mobile)			
	Timesheet Management on Mobile			
	Continued Compliance Handling			
Platform Reliability & Ease of Administration Improved tenant management Easier user administration	Self-Service Tenant Lifecycle Management			
	Impersonation & Role Delegation			
	Forecast Reliability Improvement			
	WCAG Level AA			



Legion Product Roadmap - 3

Updated September '24

THEMES	Summer '24	Winter '24	Spring '25	Summer '25
Generative AI Assistants for WFM Using Generative AI to create conversational agents that assist with discrete tasks and improve user productivity	Assistants <ul style="list-style-type: none">• Newsfeed Authoring• Schedule• Expression Explainer• Timesheet Search	Assistants <ul style="list-style-type: none">• Onboarding• Shift-Edit• Expression Authoring• Schedule Publish Writer• Comms Content Translation		
			Assistants <ul style="list-style-type: none">• News Feed Moderation• Timesheet Management• Employee Search• Upper Field Insights (mobile)• Schedule Change Recommendation	



Legion Product Roadmap - 4

THEME

Globalization

23

Current Countries with Legion Customers

Australia, Belgium, Canada, China (Mainland and Hong Kong), Denmark, Dubai, Finland, France, Germany, Ireland, Italy, Mexico, Netherlands, New Zealand, Oman, Puerto Rico, Saudi Arabia, Spain, Sweden, Switzerland, UAE, UK

14

Countries Planned in 2024/25

Austria, Croatia, Czech Rep., Greece, Hungary, Israel, Japan, Korea, Norway, Poland, Portugal, Singapore, Taiwan, Turkey

18

Languages in Active Use Today

English (US and UK), Chinese (Simplified and Traditional), Danish, Dutch, Finnish, French (Canada and France), German, Greek, Italian, Malay, Polish, Portuguese (Portugal), Spanish (Latin America and Spain), Swedish



33

Languages Supported



Schedule Optimization

Continue enhancing the schedule optimizer to meet the unique scheduling requirements of various industries and regions

Released in Summer '24

Budgeted Guidance Enhancements

Productivity Based Optimization

Planned in Winter '24

Hard Stops & warnings for Monthly, Yearly, Quarterly contract compliance rules

Ability to recalculate breaks when changes are made to schedule

Facilitate the generation of compliant schedules in countries that require a mandatory weekly rest period

Create schedules for unionized organizations according to seniority rankings based on employees' service periods with the company

Ability to prioritize availability over minimum hour enforcement

Establish an Alternate Work Week with Consecutive Days that allows for working multiple days in a row or every other day, without repeating the same days each week

On Roadmap

Ability to include Schedule Fairness rules (weekends, evenings, OT) in Schedule Automation

Allow shifts to be scheduled at the 15- and 45-minute marks of each hour

Ability to configure a maximum number of holidays and Sundays scheduled or worked within a defined period, including a hard stop option

Improve Scheduled Break Optimization - equal timing between rest and meal breaks, allowing for a more balanced distribution



Smart Template

Continue enhancing Smart Template to support various scheduling methods

Released in Summer '24

Set up for Multi-week pattern support

Split up of recurring shifts and shift patterns that must be assigned together

Planned in Winter '24

Ability to Configure which work roles can be created in Smart Templates

Ability to limit multi-role transitions to specific Work Roles

Ability to save a blank template version without any assignments (smart templates)

Multi-week pattern support

On Roadmap

Ability to create multiple smart templates

Ability to see Recommended TMs when setting up Smart Templates

Shift pattern improvements



Schedule Management UI Enhancements

Delight store managers by significantly simplifying schedule management with an intuitive user experience

Released in Summer '24

Enhance the day view to easily add, move, and manage meals and rest breaks.

Bulk update or deletion across multiple shifts, and drag-and-drop functionality to adjust timing as needed.

Planned in Winter '24

Anchored Employee View

Simple and intuitive shift creation and editing

Improved schedule view with easy navigation between day and week views, plus the option to incrementally view additional days/weeks

On Roadmap

More responsive UI

Improvements in Schedule Print design



Schedule Score

More flexibility and configurability for Schedule Scores

Released in Summer '24

Planned in Winter '24

Schedule Score by Work Role Demands

On Roadmap

Ability for customer to define which driver(s) determine Peak Hours (impacts Schedule Score)

Ability for customer to define which driver(s) determine Peak Hours (impacts Schedule Score)

Schedule Score (Overnight Shifts) - Ability to

Support 1.5 day storage format for Schedule Score slot records

Ability to turn on Schedule Score in Schedule Policy Template (thus by location)

Schedule Score Not Filtering When a Sublocation is Selected

Allow Schedule Score visibility to be configurable by location



Availability Management

Continue making it easier for match schedules with employee availability

Released in Summer '24

Planned in Winter '24

Improvements in support for committed hours.

Enabling alignment of availability capture to day parts or customer-defined “chunks”

Generative AI assistant to better guide the employee on setting optimal availability preferences

On Roadmap

Simplify the entry of availability in the UI



Employee Productivity

Measure and optimize schedules using employee productivity

Released in Summer '24

Computation of employee productivity score

Consumption of productivity score by the optimizer

Display of productivity score in shift swap, Recommended TM, and the Employee Card

Support for rolling periods

Planned in Winter '24

Improvement in mobile UX to display employee productivity & performance metrics

Ability to use multiple drivers for productivity based scheduling

On Roadmap



Increased Forecast Explainability & Reliability

Continue making the demand forecasts more transparent and reliable

Released in Summer '24

Show an upper bound and lower bound around forecast as a point of reference for the demand forecasts

Planned in Winter '24

Handle anomalies in forecasting data

Improved monitoring and alerts

Show attribution of external factors when forecasted demand is out of band from the typical demand

On Roadmap



Time & Attendance Workbench

Powerful capabilities to manage timesheets and payroll pre-process at scale

Released in Summer '24

HQ level visibility for Payroll Administrators

Improved pay period navigation

Generative AI Search

Updated Timesheet Results

Bulk Edits

Planned in Winter '24

Availability for managers

Payroll close process improvements

Payroll Dashboard

Better support for paygroup

On Roadmap

Automated Payroll Validation



Platform Initiatives

Description / Context

Released in Summer '24

Configurable Smart Cards
Report Generator Enhancements
Strategic Insights Improvements
API Updates
SAP Integration Improvements

Planned in Winter '24

Impersonation
Role Delegation

On Roadmap

Tenant life cycle management
Complete audit history for template changes
Admin approval for template changes
Accessibility - WCAG Level AA



Legion Product Availability - Europe

	Austria	Belgium	Denmark	Finland	France	Germany	Greece
Supported Languages	German	Dutch, French, German	Danish	Finnish	French	German	Greek
Labor Budgeting	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability
Demand Forecasting	Live since 06/24	Live since 05/24	Planned for 07/25	Available	Live since 02/24	Live since 11/23	Live since 05/24
Automated Scheduling	Live since 06/24	Live since 05/24	Planned for 07/25	Available	Live since 02/24	Live since 11/23	Live since 05/24
Time and Attendance	Planned for 01/25	Planned for 01/25	Planned for 07/25	Planned for 01/25	Planned for 01/25	Planned for 01/25	Planned for 01/25
Strategic Insight	Live since 06/24	Live since 05/24	Live since 02/24	Live since 02/24	Live since 02/24	Live since 11/23	Live since 05/24
Frontline Comms	Live since 06/24	Live since 05/24	Live since 02/24	Live since 02/24	Live since 02/24	Live since 11/23	Live since 05/24
Performance & Rewards	Live since 06/24	Live since 05/24	Live since 02/24	Live since 02/24	Live since 02/24	Live since 11/23	Live since 05/24



Legion Product Availability - Europe Cont.

	Ireland	Israel*	Italy	Netherlands	Poland	Spain	Sweden
Supported Languages	English	US English	Italian	Dutch	Polish	Spanish	Swedish
Labor Budgeting	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability
Demand Forecasting	Live	Live since 06/24	Live since 02/24	Live since 02/24	Planned for 01/25	Live since 02/24	Live since 02/24
Automated Scheduling	Live	Live since 06/24	Live since 02/24	Live since 02/24	Planned for 01/25	Live since 02/24	Live since 02/24
Time and Attendance	Limited Availability	Planned for 01/25	Planned for 01/25	Planned for 01/25	Planned for 01/25	Planned for 01/25	Planned for 01/25
Strategic Insights	Live	Live since 06/24	Live since 02/24	Live since 02/24	Live since 06/24	Live since 02/24	Live since 02/24
Frontline Comms	Live	Live since 06/24	Live since 02/24	Live since 02/24	Live since 06/24	Live since 02/24	Live since 02/24
Performance & Rewards	Limited Availability	Live since 06/24	Live since 02/24	Live since 02/24	Live since 06/24	Live since 02/24	Live since 02/24

* English only - Hebrew is not supported



Legion Product Availability - Europe Cont.

	Switzerland	United Kingdom	Portugal	Hungary	Norway	Turkey	Croatia
Supported Languages	French, German, Italian	UK English	Portuguese	Hungarian	Norwegian	Turkish	Croatian
Labor Budgeting	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability
Demand Forecasting	Limited Availability	Live	Planned for 08/24	Planned for 07/25	Planned for 07/25	Planned for 07/25	Planned for 07/25
Automated Scheduling	Limited Availability	Live	Planned for 08/24	Planned for 07/25	Planned for 07/25	Planned for 07/25	Planned for 07/25
Time and Attendance	Limited Availability	Planned for 01/25	Planned for 01/25	Planned for 01/25	Planned for 07/25	Planned for 07/25	Planned for 07/25
Strategic Insights	Limited Availability	Live	Planned for 07/24	Planned for 01/25	Planned for 02/25	Planned for 02/25	Planned for 06/25
Frontline Comms	Limited Availability	Live	Planned for 07/24	Planned for 01/25	Planned for 02/25	Planned for 02/25	Planned for 06/25
Performance & Rewards	Limited Availability	Live	Planned for 07/24	Planned for 01/25	Planned for 02/25	Planned for 02/25	Planned for 06/25



Legion Product Planned - Europe Cont.

	Czech Republic
Supported Languages	Czech
Labor Budgeting	Limited Availability
Demand Forecasting	Planned for 07/25
Automated Scheduling	Planned for 07/25
Time and Attendance	Planned for 07/25
Strategic Insights	Planned for 01/25
Frontline Comms	Planned for 01/25
Performance & Rewards	Planned for 01/25



Legion Product Availability - Asia Pacific

	Australia	China	Japan	Korea	Malaysia	New Zealand	
Supported Languages	US English UK English	Simplified Traditional	Japanese	Korean	Malay	US English UK English	
Labor Budgeting	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	Limited Availability	
Demand Forecasting	Available	Planned for 01/25	Planned For 01/25	Planned For 11/24	Planned For 11/24	Planned for 09/24	
Automated Scheduling	Available	Planned for 01/25	Planned For 01/25	Planned For 11/24	Planned For 11/24	Planned for 09/24	
Time and Attendance**	Future Roadmap (Winter 2025)	Future Roadmap (Winter 2025)	Future Roadmap (Winter 2025)	Future Roadmap (Winter 2025)	Future Roadmap (Winter 2025)	Future Roadmap (Winter 2025)	
Strategic Insight	Available	Live since 05/24	Planned For 10/24	Planned For 11/24	Planned For 11/24	Planned for 09/24	
Frontline Comms	Available	No Available	Planned For 10/24	Planned For 11/24	Planned For 11/24	Planned for 09/24	
Performance & Rewards	Available	Live since 05/24	Planned For 10/24	Planned For 11/24	Planned For 11/24	Planned for 09/24	



An aerial photograph of a resort town at dusk. The town is nestled in a valley, with its lights glowing against the twilight sky. In the background, there are large, forested mountains with some ski runs visible. The sky is a mix of blue and purple hues, suggesting the time is either early morning or late evening. The overall scene is peaceful and scenic.

Future Innovation Ideas

Mitri Dahdaly
VP Solution Design

Brandon Sims
Solution Architect

October 2023 CAB Voting Results

Strategic Objectives		Feature	Voting Results	Release
Continue Intelligent Automation of WFM	1	SCHEDULE CHANGE RECOMMENDATIONS	2 (tied)	Spring 2025
	2	SUPPORT RADIUS DETECTION FOR WORKFORCE SHARING GROUPS	6 (tied)	
	3	ABILITY TO VIEW PURE WORKLOAD IN UI	6 (tied)	
	4	BULK ASSIGN SHIFTS	9	Winter 2024
	5	PRODUCTIVITY SMART CARDS (SPH, TPH, IPH)	5	Summer 2024
	6	MOBILE ENABLEMENT FOR ABOVE STORES USERS	1	Spring 2025
	7	SCHEDULE COVERAGE GRAPH	2 (tied)	Spring 2025
	8	LABOR DRIVER GROUPS	10	
Continue Enhancing Employee Experience & Value	3	PEER-TO-PEER RECOGNITION	6 (tied)	
	4	EMPLOYEE WORK PREFERENCE RANKING	4	Winter 2024



October 2024 CAB Voting List

If you had \$1,000 to spend,
what would you spend it on?

Ex. \$100 on #1 or \$200 on #2 and \$500 on #4

Continue Intelligent
Automation of WFM

1

TIME OFF MANAGEMENT AUTOMATION

Managers struggle with approving time off requests as they lack the visibility into demand and available labor to make an informed decision.

FORECAST WORKBENCH

2

Decentralized management of forecasts and insights causes inefficiencies, inconsistencies, and challenges in organizational decision-making

ALTERNATIVE REPORTING HIERARCHIES

3

Organizations struggle with reporting and rolling up their data across different hierarchies.

SCHEDULE GENERATION AND PUBLISHING AUTOMATION

4

Organizations struggle with having their managers create and published schedules on time and may want to automate the process.

WORKLOAD COVERAGE PRIORITY

5

In organizations where workload can be covered by multiple work roles, Legion lacks the ability to prioritize which work role should be favored to cover which tasks.

LABOR ALLOCATION TRACKING

6

Organizations struggle with tracking and reporting on specific labor activities that occur throughout the workday.

HEAD COUNT AND CAPACITY PLANNING

7

Make WFM a Platform for
Labor Planning

Today organizations lack tools to assist in planning their roster composition. They lack tools to determine skill gaps with their roster, the ideal FT/PT mix and when those gaps are.



October 2024 CAB Voting List

If you had \$1,000 to spend,
what would you spend it on?

Ex. \$100 on #1 or \$200 on #2 and \$500 on #4

Continue Enhancing Employee Experience & Value

8

EMPLOYEE WORK ROLE PREFERENCES

Today Legion allows employees to define preferences for when, where and how long they work but for employees who are capable of working in multiple work roles Legion lacks the ability to specify which work roles employees prefer working

EMPLOYEE SELF SERVICE PUNCH CORRECTION REQUEST

Today Employees who miss punching in or out are not able to inform their manager of their missed punch or a punch that may require correction. Managers also struggle with collecting the missing punches from employees in a timely manner which may impact their ability to provide payroll with timely and accurate data.

ADD MESSAGE CENTER TO LTC

Today Employees lack visibility to pending Legion Messages, Surveys, Legion InstantPay balances, Shift Offers etc. potentially missing out on time sensitive communications.

9

10

*Excludes items already planned to be completed in Winter '24



Product Roadmap – Candidate Features

Continue Intelligent Automation of WFM

TIME OFF MANAGEMENT AUTOMATION

Problem – Managers struggle with approving time off requests as they lack the visibility into demand and available labor to make an informed decision.

Solution – Expand the set of rules related to time off requests to include black out dates, maximum notice days, must be scheduled. While also enabling the ability to have time off request auto approved or for Legion to recommend the appropriate action to the manager.

NOTIFICATION AND ALERT FRAMEWORK

Problem – Legion WFM processes time sensitive data, today users must log into Legion and run reports or view dashboards to understand if there are workforce events that need to be addressed, many times missing the window to prevent a violation from occurring.

Solution – Provide administrators with the ability to configure which events and thresholds trigger notifications or alerts that will be pushed to managers so that they can take immediate action.



Product Roadmap – Candidate Features

Continue Intelligent Automation of WFM

ALTERNATIVE HIERARCHIES

Problem – Many organizations manage their locations and sub locations using different hierarchies for different sets of users or roll ups. Currently Legion only supports a single hierarchy preventing organizations from achieving their their desired reporting rollups and access control requirements.

Solution – Enable multiple upper field hierarchies allowing individual locations to belong to multiple parents in different hierarchies to support both rollup reporting as well as access control.

SCHEDULE GENERATION AND PUBLISHING AUTOMATION

Problem – Organizations may have locations that extensively or exclusively use shift patterns for scheduling and want to publish schedules far into the future in the most efficient manner. Additionally some organizations struggle with having their managers create and published schedules on time.

Solution – Provide administrators with the ability to configure which locations and when schedules are auto generated and published.



Product Roadmap – Candidate Features

Continue Intelligent Automation of WFM

WORKLOAD COVERAGE PRIORITY

Problem – In organizations where workload can be covered by multiple work roles, Legion lacks the ability to prioritize which work role should be favored to cover which tasks.

Solution – Provide the ability to assign a priority ranking of work roles within each task assignment within the Labor Model.

ACTIVITY BASED SCHEDULING AND TIME TRACKING

Problem – Organizations struggle with scheduling and tracking specific activities that occur throughout the workday. They currently lack the ability to track and report on time spent on capitalized projects, equipment used, meet time etc. Preventing them from being able to accurately report on the cost of those activities.

Solution – Provide a framework to configure one or more labor activities that can be used to schedule and track time against. Provide employees with the ability to clock in against these activities, and provide organizations with the ability to export the data to payroll and to roll up the hours scheduled and recorded against those data entities for analysis.



Product Roadmap – Candidate Features

Make WFM a Platform for Labor Planning

HEADCOUNT AND CAPACITY PLANNING

Problem – Today organizations lack tools to assist in the planning of their roster composition. They lack the tools to determine the skills gaps with their current roster, the appropriate FT/PT mix and where within the year those gaps are.

Solution – Enhance Legion Long Range budgeting to forecast headcount needs by work role, the appropriate FT/PT mix and compare the forecasted need with the current roster, factoring in forecasted turnover to provide the staffing gap by fiscal week.



Product Roadmap – Candidate Features

Continue Enhancing Employee Experience & Value

EMPLOYEE WORK ROLE PREFERENCES

Problem – Today Legion allows employees to define preferences for when, where and how long they work but for employees who are capable of working in multiple work roles Legion lacks the ability to specify which work roles employees prefer working

Solution – Enable employees to specify which work roles they prefer working or a ranked list of work roles for consideration in the schedule generation, shift recommendations, shift offer and shift swap/cover processes.

EMPLOYEE SELF SERVICE PUNCH CORRECTION REQUEST

Problem – Today Employees who miss punching in or out are not able to inform their manager of their missed punch or a punch that may require correction. Managers also struggle with collecting the missing punches from employees in a timely manner which may impact their ability to provide payroll with timely and accurate data.

Solution – Provide a solution for employees to be able to request either a correction to an existing punch or the submission of a missing punch. This request will appear on the timesheet and require approval from the manager drastically reducing the time a manager spends fixing punches.



Day 1 Wrap-Up

Michael Spataro
Chief Customer Officer

Welcome to Day 2

Michael Spataro
Chief Customer Officer

Prioritization Voting Results

	Time Off Management Automation	Messaging on LTC	Forecast Workbench	Alternative Hierarchies	Schedule Generation & Publishing Automation	Workload Coverage Priority	Labor Allocation	Head Count & Capacity Planning	Employee Workrole Preferences	Employee Self Service Punch Correction Request	
Coach	500		100	100				200	100		1000
Towne Park	200							200	200	400	1000
Cinemark	200			100				300	100	300	1000
Helzberg Diamonds	200			100				500		200	1000
VEG	200		200	200		200		200			1000
Rally House	100		500	200				100		100	1000
Five Below	100	200		100						600	1000
Real Real	100	100		200	200	100		300			1000
Suit Supply	100	100			300			100	200	200	1000
Panda		200	200			200			200	200	1000
Circle K		200				400			200	200	1000
Race Trac		100	100			100			200	500	1000
Rite Aid			200	600				200			1000
Sweet Greens			400			100		500			1000
Nike			400	600							1000
Mattress Firm				400	600						1000
Ingka				100	200	300		300	100		1000
Vail					300	200	100	300	100		1000
Bright Horizons					1000						1000
TOTAL	1700	900	2100	2700	2600	1600	100	3200	1400	2700	

Birds of a Feather

Topics

- Table 1: Best practices in deployment and adoption
- Table 2: Best practices in administration and system configuration
- Table 3: Leveraging WFM in HR
- Table 4: Best practices in schedule optimization



Table Assignments: Session 1

Table 1	Table 2	Table 3	Table 4
Best practices in deployment and adoption	Best practices in administration and system configuration	Leveraging WFM in HR	Best practices in schedule optimization
Jim Matt C Tegan Meha Shamia Steve Page Lauren Robyn Jonathan	Donna Koren Mike Anthony Christopher Mark Steve Z Ryan	Maureen Tia Fazlin Shamia (tbd) Bill Derek	Stephanie Sindy Kristen Matt Sally Bryan



Table Assignments: Session 2

Table 1	Table 2	Table 4
Best practices in deployment and adoption	Best practices in administration and system configuration	Best practices in schedule optimization
	Tia Maureen Fazlin Sindy Kristen Matt Bill Matt C Shamia	Koren Derek Lauren Robyn Tegan Jonathan Jim Meha Steve P Donna Mark Christopher Ryan



Lightning Round and Wrap-Up

Michael Spataro
Chief Customer Officer