



POST COVID PIVOTS

## *A DIY Optimization Guide for UKG Admins*

Workforce management technology can be one of your company's most powerful business drivers. It's a hefty investment designed to deliver hefty results. And even if the pandemic derailed your workflow, your efficiency shouldn't be compromised. In fact, moving into a post-COVID economy, your workforce technology could become pivotal in your recovery, by strengthening compliance, streamlining labor, and restoring service to pre-pandemic levels.

As a UKG Admin, a sizable part of your post-COVID success relies on your assessment and understanding how your team uses your system versus how it's designed to be used. Your UKG software should automate tedious tasks and elevate your Timekeeping and Scheduling management by reducing labor costs, strengthening compliance, and delivering real-time analytics for better decision making.

### **Workforce Transformation**

Still, even with all that powerful functionality you purchased, there's one piece of the ROI pie that didn't come with your software package. That revenue driver is optimization. Optimization is less about the technology you purchased and more about the focus and processes of the people using it. Software ROI is dependent on people committed to that technology as a workforce transformation tool, rather than a mechanism that corrals and directs daily tasks.

### **Optimization Obstacles**

In-house optimization efforts often face three obstacles: time, money, and consistency. However, over the past 30 years, we've helped (and have witnessed) countless companies overcome those obstacles with a simple, in-house optimization plan that can be carried out by a UKG Admin (and perhaps a few IT folks from time to time).

Sure, as UKG Workforce Central (WFC) consultants, we'd love our clients to have us on speed dial for every optimization whim. However, while an in-depth optimization plan often requires outside help (which we gladly provide when needed), our bigger goal is to equip you with the in-house skills you need to experience optimization efficiency wins every day.

### **Optimization as a Strategy**

Perhaps you haven't thought of optimization as a business strategy before now, but you'd be surprised at how many of your competitors do. A healthy optimization plan

involves consistently re-evaluating and automating processes, aligning (and realigning) workforce software with business goals, increasing data visibility, strengthening compliance, and solving business problems related to your workforce.

The degree of optimization you achieve determines your software ROI and directly affects critical KPIs such as increasing productivity, reducing errors, and improving hiring, retention, and customer service. In short, the more you can optimize your workforce management tools (UKG software), the more profitable and competitive your company can be.

## How Optimized Are You?

One way to quickly assess your WFC platform's optimization needs is to set efficiency goals or targets. Once set, watch and assess if various departments are meeting the targets. If outcomes fall short of targets or if productivity reverts to pre-implementation numbers, your system is likely due for a tune-up. Here are a few key questions to help you assess optimization needs.

- Have we implemented all the WFC features we paid for? Are there unused licenses? Consider creating a comparison checklist to assess optimization gaps.
  - Note: To find license counts for installed UKG products in the WFC environment go to Setup > System Configuration > System Information.
- Are we getting our value from our paid features such as self-service capabilities? Scheduling tools? Labor Tracking? Absence Management? Analytics?
  - Note: Frequently small changes like Schedule Groups can increase efficiency by lowering maintenance effort for Scheduling; or implementing Global Time-Off Requests can allow employees to get more self-service out of their Mobile applications.
- Are we using WFC's payroll and compliance tools to consistently apply COVID-related policies? Are we risking hefty fines or other costs associated with non-compliance? Are there any union agreements or labor laws we need to consider?
- Are scheduling and tracking tools properly configured for temporary or contract workers?
  - Note: Healthcare organizations should routinely review the setup for Agency workers, particularly if there has been a change in their utilization with COVID.
- Are we properly tracking employees who now work remotely due to COVID-19?
- What WFC training do we need to reach our optimization goals?
- Is our WFC platform scaling with growth? Does it easily track additional staff, new offices, and different office locations?
  - Note: Often a key indicator that integrations aren't working well is when an influx of new employees illuminates the amount of manual work required to set them up in the UKG WFC system.
- Is there a drop in administrative and labor costs since upgrading or implementing WFC? If you don't see improvements, identify areas to optimize.

- Are there manual processes that we could automate? For example, does the business still use paper time-off requests, or paper missed-punch correction forms? If so, consider optimizing WFC features to streamline these tasks.
- Is there an increase or decrease in human errors since our last implementation or upgrade? The answer to this question will lead you to one of two places: Optimize your WFC software where needed or pause and give your team additional WFC training.

According to Lead Improv Application Consultant Paul Gaetani, while the word optimization sounds complex, just about any UKG Admin or Manager can improve system efficiency by taking the time to implement a few easy fixes.

## 6 Ways to DIY Your Optimization

### 1. *Manage Timecards by Exceptions*

One of the most important tasks you perform as a UKG Admin or Manager in Workforce Timekeeper is reviewing punch exceptions. The way you choose to do that task can have a positive or negative optimization return.

Exceptions in Workforce Central are flags that alert a supervisor when an employee works outside their assigned shift. This timecard event is considered an exception to the regular work schedule. Exceptions appear in the Timecard Editor, outlined in red, and on Reports. They highlight missed punches, absences, late punches, and so on. The punch may require an edit, be it a comment and note, a canceled meal deduction, or a change of punch interpretation. In some cases, no action is needed; just being aware the exception exists is enough.

According to Improv Managing Director Audrey Mattoon, UKG users often look first to technology configurations when optimizing instead of the human work process that may be the true optimization hurdle.

“It’s a common mistake. If you are responsible for reviewing Timecards and weren’t trained properly, you wouldn’t even know you were making this mistake,” says Mattoon. “A lot of managers look at every piece of information on a Timecard, when they only need to be looking at the items in red — the exceptions. By skipping the 80 percent of Timecard information that is correct and managing by exception (the 20%), you can instantly reduce your workload and optimize the way you’re using WFC.”

### NEXT STEPS

**Leverage your alerts.** Review how your Exception alerts are configured in your Navigator to make sure they are drawing the right attention to the right Exception. Random alerts distract and confuse users. Even if slight, distractions add up and can hinder optimization efforts.

**Review your schedules.** Exceptions are only correct if schedules are appropriately maintained in the UKG WFC system. Consider implementing Schedule Groups for employees who routinely work the same shifts or rotate through shifts together. Implement the Global Time Off-Request feature to ensure that all the absence information is correctly in WFC without additional human effort.

## 2. Summon the Power of Genies

When managers log into Timekeeper, they want to see useful information about their people quickly. WFC Genies deliver that information and can be a powerful tool for managing employees' time. Using Genies, managers can easily view critical Timekeeping data such as total hours, overtime, shifts, PTO, and Timecard approval all in one location.

Genies work with HyperFinds to display the information that users require. Remember, a Genie defines the information that will be displayed about a selected group of employees. Too, a Genie defines the column set that is available to display information. The HyperFind defines which employees the returned information pertains to.

### NEXT STEPS

**Harness the configurability of Navigators.** The default Genie that displays for a Manager's workspace can be set in the Navigator configuration. If Managers are complaining about difficulty seeing the data they need, or how time consuming it is to find it, consider setting a new default Genie so that the first thing displayed when a Manager logs in is the most common pieces of information they require. This solution will simplify your workspace, reduce clicks, and save your team time completing daily tasks.

**Prioritize learning.** If you are like many UKG Admins, stopping a busy week to learn something new can feel like a correction or a hassle that will only slow you down. Not so. Setting aside time to learn is the best way to get faster and more competent in your work (it may even raise your smiles per hour ratio). Consider putting aside an hour or two this week to build your WFC skills. Ask someone for help, read a few blogs, watch a video, or [take a class](#).

## 3. Observe Frontline WFC Users

This step sounds simple, but simply strolling the halls (or asking to share a computer screen if remote) and watching how Admins and managers carry out their WFC tasks is a powerful way to gain valuable, actionable optimization insights. In this process, you may find training gaps, configuration inconsistencies, process redundancies, and homegrown workarounds that could be hampering your organization's efficiency and working against your optimization goals.

“What you find by observing may amaze you,” says Gaetani. “People have trouble with change. Even after they engage with the system initially through a User Acceptance Training (UAT) and training period, it's easy to get overwhelmed and resort back to old habits. The goal in observing is to become more aware of how users interact with the system and why so that you can constantly revise and improve.”

When observing, Gaetani recommends that managers pay attention to how often schedules are changed and updated. Also, if schedules do not match timecards, it may tell you which WFC Admins have strayed from established protocols.

### NEXT STEPS

**Form an internal user group.** One way to promote ongoing optimization efforts is to consider forming an in-house user group for WFC Schedulers or Timecard Managers. Discuss best practices, reiterate processes across departments, share common goals and challenges. Note: Be sure there's at least one WFC expert or power user in the group who can share best practices and advise on established protocols.

## CASE IN POINT

One Improv client decided to get creative with her plan to raise WFC user adoption and improve WFC optimization on her team, says Gaetani. Following a WFC upgrade, the Admin team was trained extensively in new, automated scheduling protocols. This upgrade meant they were no longer allowed to print schedules and put them in binders. All scheduling data had to be real-time and accessible at once in the system. However, about a week after the rollout, the manager noticed more Post-Its and binders appearing in workstations. To reverse this step backward, for the next four weeks, the manager arrived at work early each morning and removed every piece of paper, pen, pencil, binder, and Post-It before her staff arrived. The result: The team soon (though not without a few moans) adopted 100% to the new scheduling process!

### 4. Reduce Clutter & Clicks

This optimization step goes hand in hand with step #2 but requires an Admin to take specific action. After observing users on the system, your next goal is to streamline your WFC workspaces and reduce as many clicks as possible. Yes, this takes time initially, but the investment could save you hundreds of hours overall. You can do this specifically by:

- **Optimize WFC workspaces.** Observe the WFC Widgets your team uses most often and move them into a primary view on the screen. This will at once eliminate several clicks.
- **Customize WFC Navigator templates.** Often WFC users tend to work from default Widget templates that have nothing to do with their daily workflow. These default settings generate distracting alerts and notifications and cause additional clicks. Advises Gaetani: “Simplify workspaces and customize Navigators to the way a user works. This is a small but significant step toward optimization and efficiency.”
- **Eliminate clicks.** Look for click patterns in the way people use their Timecards, Calendars, and Alerts and reduce each unnecessary click. What’s the big deal with a click? Glad you asked. Every click translates to time and that time costs dollars — real dollars (see Case in Point below).

## NEXT STEPS

Schedule time to streamline. Gaining knowledge about Optimization is one thing — acting on that knowledge and harvesting the needed ROI out of your software — that takes intention. Consider setting two hours aside each week to declutter and eliminate clicks within your system for the next few months.

## CASE IN POINT

Reducing clicks may seem redundant, but in the WFM world, where efficiency is king, there’s a degree of math behind every task.

Paul offers this example: If removing one click from a transaction is estimated to save 40-50 labor hours a year per employee, and you have 200 managers who log in to WFC twice a day, 52 weeks a year, that's hundreds of thousands of labor hours.

“That’s how we need to teach people to think about optimization,” says Gaetani. “All of those clicks are actually taking away from time that can be spent on more profitable, strategic tasks.”

## 5. Review Pay Rules

Beyond observing users and reviewing internal processes, the next step in optimization is to look at your Pay Rules. Are your Pay Rules configured to use all WFC's automation regarding Shifts, Zones and Pay Codes?

If the Pay Rules are only capturing a part of internal policies, there may be manual processes that need to be eliminated. Most manual processes can be captured by the Pay Rules if there is an aspect of the rule or policy that allows for a qualifier to be placed within the rule. Most companies have generalized policies that are easily captured within the Pay Rules, but there are always items within certain policies, union contracts or state policies that make things more complicated. The more complicated situations can cause manual and off-cycle payments, as well as higher costs.

### NEXT STEPS

**Compare Pay Rules to policies.** Start your analysis by comparing your Pay Rules to internal policies, along with [State, Federal, and Union rules](#). Also gather as much information as possible from descriptive policies, contracts, and user processes. This will reveal what information can be moved to a Pay Rule and automated. This straightforward process will improve optimization as well as productivity.

## 6. Elevate Training Post-COVID

It is a common mistake to assume that WFC training stops after a rollout. Even aside from the pandemic shakeup, work environments change constantly. WFC Admins change roles, new people get hired, and the WFC application itself is continually updated. Too, its managers often teach Admin skills incorrectly. For this reason, ongoing, expert training — that reflects best practices — is a significant factor in optimization.

Education impacts optimization in several ways. In [LinkedIn Learning's 2019 Workplace Learning Report](#), 94 percent of employees said education benefits would persuade them to stay at their company longer. [A 2015 study from Great Britain](#) found that providing more training to employees increases their wages — but not as much as it increases their productivity. Many other studies confirm the bottom-line benefits of employee education benefits. According to Lumina Foundation and Guild Education calculations, the ROI for educating employees is between 129 and 185 percent.

### CASE IN POINT

Following an intense system upgrade that overhauled its payroll process entirely, one Improv client took the time to zero in on training, which [increased user adoption by 25 percent](#). The client credits Improv's creative approach to training, saying, "We hit our implementation goals, approached training in a whole new way, and we're headed into our future pretty excited about everything our workforce management system can do for us!"

### NEXT STEPS

**Find and fix training gaps.** Yes, some of your training can be carried out in-house if you have expertise and ability. However, if your organization is large and super users or Admins are few, you will need outside experts to fill the knowledge gaps that continue to undercut efficiency. User adoption and skill deficits are the top threats to your system ROI, which is why it's important to bring in [additional training on WFC](#) or [change management](#) help sooner rather than later.

**Invest in WFC training.** Better outcomes don't just happen. Increasing your knowledge and skills requires a plan. Consider taking the next necessary step to bridge the training and skills gaps you or your team need to succeed in the job. Don't choose any training; opt for role-based training that equips you to use your software in the way you work.

## Beyond DIY

Let's be honest, eventually, you may have optimization needs that exceed your team's bandwidth or DIY skills. For those times, it's wise to reach out to a [qualified UKG partner](#) that can recommend best practices and create custom configurations that leverage WFC's most powerful features. A seasoned consultant will create an optimization plan that considers your workforce wish list as well as ways to alleviate the pain points hindering optimization.

## Conclusion

Optimization is one of the most powerful tools you have to rebuild your post-COVID workforce. For our UKG clients who stall or minimize the need to optimize, we paint this vivid picture: You purchased a new Porsche a year ago but have yet to slow down long enough to read the manual (optimize your ride). So, you're continue to drive a race car around town at 40 mph, the same way you drove your old Volkswagen. The fact is, you've got power — lots of it — and your Porsche (WFC) is capable, when optimized, of outpacing and outperforming everyone else on the track.

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## Fast Track Your UKG Skills

### *UKG Training Designed for the Way You Actually Work*

To regain a competitive edge in a post-pandemic economy, many leaders are turning to training to minimize the need for new hires, cross-train a reduced workforce, and strengthen a fragile workforce. Trends in upskilling (learning new tasks) and reskilling (learning current tasks more deeply) continue to climb.

With these workforce challenges in mind, Improv is offering UKG Super Guru Training, [a new and engaging training solution](#) designed to help UKG Admins fill in the knowledge gaps that chip away at your optimization goals.

