

# UKG Scheduling Solutions

## Optimize branch staff scheduling to meet productivity goals and service demands with UKG for Banking

Scheduling branch staff is a complex, time-consuming task that has a direct impact on your service — and your earnings. Not enough people working during high-traffic hours? The account holder experience suffers. Too many people working during slow periods? You're paying employees to stand around and wait for work. As your financial institution strives to balance account holder service with operational efficiency, you need a more effective way to put the right staff member in the right place at the right time.

UKG™ (Ultimate Kronos Group) scheduling solutions, part of the UKG for Banking solution, take the guesswork out of scheduling frontline staff and other employees at your retail locations. Designed specifically for banks and credit unions, this easy-to-use software enables you to effectively schedule staff based on forecasted traffic levels at each branch while taking into account individual employee skills and availability. The solution's powerful performance analytics analyze your monthly transaction data and forecast account holder traffic, helping you create schedules with an optimal mix of full-time and part-time employees. With the right employees staffing your branches throughout the day, your financial institution is better equipped to achieve workforce optimization goals and meet — or exceed — account holder service demands.

### Easily create and edit effective branch schedules

Save valuable time when creating and managing branch schedules. UKG scheduling solutions automate and streamline the schedule creation process so you spend less time rearranging employee schedules and more time improving the account holder experience. If an employee calls in sick or has a last-minute vacation request, the robust drag-and-drop schedule editor makes it easy to adjust the schedule accordingly. You get instant visibility into the impact of schedule changes, enabling you to take steps to maximize branch efficiency and service.

In addition, the solution enables your employees to view their

### Key benefits

**Create optimal schedules** that precisely align staff mix with account holder traffic patterns at your branches

**Accurately determine how to handle attrition** by replacing staff with full-time or part-time employees — or not at all — based on actual need

**Control labor costs** by creating schedules — based on accurate forecasts — that minimize excess staffing

**Improve employee engagement** by scheduling fair rotations for less desirable shifts or tasks

**Boost productivity** by identifying idle time and redirecting staff to more meaningful tasks

schedules — anytime, anywhere — directly from their mobile devices for optimal flexibility and convenience.

**Take into account each employee’s skills and availability**

Managing your employees’ availability and skill sets is critical for effective branch scheduling. UKG scheduling solutions make it simple to create employee profiles that put all this vital information at your fingertips. Ready access to employee profile data not only streamlines schedule creation, but it also simplifies cross-utilization and reallocation of resources within the branch. Use this intuitive feature to:

- Manage when employees are — and are not — available to work
- Select the maximum number of days or hours an individual can work
- Assign individual staff members to specific branch locations based on special skills, such as bilingualism or mortgage lending expertise

By taking into account each staff member’s availability and abilities, the solution enables you to create schedules that balance service quality with labor costs — all while driving employee engagement.

**Make better staffing decisions with in-depth business intelligence**

Start scheduling branch employees based on data-driven intelligence instead of educated guesses. UKG scheduling solutions’ sophisticated performance analytics tools provide actionable insights based on historical and real-time data to drive more effective staffing decisions. The software analyzes your monthly transaction data and forecasts account holder traffic to help you

schedule the optimal mix of full-time and part-time employees throughout the day. With the right employees working in the right place at the right time, your branches are better positioned to meet workforce optimization goals and provide an exceptional service experience for account holders.

**Schedule employees based on traditional or universal agent models**

Whether your branch follows a traditional lobby model, a universal associate model, or a mix of both, UKG scheduling solutions adapt easily to meet your specific operational requirements. Create fair, equitable rotations for less desirable shifts or tasks to improve employee engagement and boost morale. Cross-utilize employees within a specific branch to optimize service. Schedule downtime responsibilities to individual staff members to improve productivity. Even manage floating staff members and fill schedule gaps on the fly to keep branches operating smoothly and efficiently.

