Navigating the way forward: 7 Workforce Management Strategies
Today’s presenters

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Sushma brings more than 20 years of experience in leadership, operations and product management in workforce management, payroll, compensation and benefits strategy, compliance, and administration. She is a recognized authority and a noted speaker at industry conferences and events, a frequent contributor to ADP blogs and widely published in news outlets. Sushma holds an MBA from Drexel University.

Jim McGeady
Sr. Director Product Marketing
ADP, Inc.

Jim has over 25 years of experience helping businesses drive results through the optimal management of their people. He has helped thousands of organizations around the world do this through his leadership roles in consulting, product management and marketing with several tech industry innovators including IBM, Infor, Kronos, and HealthcareSource. He lives and works in the Boston area, where he studied Engineering at Tufts and Business at Babson.
Disclaimer

This presentation is not:

• Legal advice
• The final word on today’s topics
• A political opinion

Before taking any actions on the information contained in this presentation, employers should review this material with internal and / or external counsel.
Agenda

• Returning to Work – The Current State
• Work/Workplace Changes
• Predicting Consumer Behavior
• Managing Employee Availability
• 7 Best Practices
  1. Revisit Timekeeping Methods
  2. Revisit Timekeeping Rules
  3. Optimize Employee Schedules
  4. Closely Monitor Absence and OT
  5. Revise and Communicate Attendance Policies
  6. Practice and Scale Leave Case Management
  7. Brush up on Compliance
• Q&A
What We’re Hearing

New requirement—be agile and ready to adapt

- Organizations adjust business models to meet changing needs and demand
- Drastic economic shift with layoffs and/or furloughs across industries
- Increased demand/hiring in certain industries
- Employers are seeking guidance and best practices
- Returning to work/returning to the NEW normal
What “state” is your business in?

All states are at least partially open, but what about your industry and business?

Returning to Normal -- Key Considerations

Safe and secure workplace
- Phased approach
- Physical / social distancing / emotional wellbeing
- Back from furlough / leave
- School / childcare closures
- Ensure business continuity

Set expectations – policies and procedures
- In-person meeting protocols
- Personal protective equipment guidelines
- Testing guidelines
- Time off, leave and attendance policies

Comply with applicable laws and regulations
- Wage and Hour laws
- Leave laws
- Employment laws
- COVID-19 related new laws
- Employee complaint / remediation process
WFM Challenges with Returning to Normal

- **Continuity** – accurate time reporting and pay
- **Staffing** – employee availability
- **Forecasting** – based on change in demand
- **Enforcing** – health and safety measures
- **Documentation** – maintain traceability
- **Compliance** – with new, changing and existing regulations
Conduct a Self-Assessment

• What is your current workforce management process?

• Who are the key stakeholders?

• What are the key activities and who performs them?

• What existing technologies are in use?

• What are the gaps?
Re-opening is Tricky Business

**PRODUCTS/SERVICES**

- Who is willing to return to work?
- Who and how many need to return to work?
- Who is available to work?
- Are customers willing and able to come back?
- When and what should we resume?

**EMPLOYEE AVAILABILITY**
Work and Workplace Factors

- Will all products and services be available or limited initially?
- Will some jobs remain remote?
- Did you create new jobs, product and service?
- Has your supply chain recovered?
- Has workspace been redesigned and capacity reduced?
- Will PPE or protocol reduce productivity?
- Will you stagger shifts and traffic?
- Will you expand hours to spread out volume?
- Will you be adding evening and overnight shifts?
Franchises re-opening – what’s on your mind?

• Franchisors
  • INFORMATION
  • Trusted source
  • Guidance interpretation
  • Community creation
  • Fed/State/Local differences
  • Monitoring re-opening success
  • Best Practices
  • PPE and technology procurement
  • PR
  • Social media
  • Liability
  • Joint employer issues

• Franchises - General
  • COST
  • Masks, distancing and hand washing/sanitizing
  • Partitions
  • Signage
  • Temperature checks
  • Uniform policies
  • Contact tracing
  • Use elbows to open doors
  • Walk single-file and follow floor markings
  • Location/geo considerations
  • Customer compliance/enforcement
  • Employee hiring/retention

• Dining
  • Drive-thru, curbside, take out, delivery online ordering, outdoor seating

• Retail
  • head-counting, signage, floor markings, fitting rooms, touchless pay, essential vs. non

• Wellness/Fitness
  • essential vs. non, spacing, equipment, partitions, locker rooms, appointment spacing/limits

• Hotels
  • sanitization, lodging, retail and restaurant best practices

• Professional Services
  • Teleappointments for Tutoring, Tax prep

• In-home services
  • masks and distancing. Communicated on website.
Customer Demand Factors

Health
- Guidelines - monitoring re-opening declarations/timing
- Consumer health – monitoring regional trends/data

Behavior
- Will people return to safest services and locations first?
- What do the safety/necessity trade-offs look like?
- What products and services will people prioritize?
- What are essential vs. what are luxury?
- Monitoring unemployment and consumer confidence

Product / Service Availability
- Which products are available?
- Which product are in demand?
- Which are you able to deliver?
- How will this evolve near-term and long-term?
The majority of adults are still very concerned

Concern Over Outbreak Among Baby Boomers Rises Again

The share of U.S. adults who are "very" concerned about the coronavirus outbreak, by generation

This data comes from Morning Consult's weekly coronavirus survey tracker, based on surveys of 2,200 U.S. adults each. The latest survey was conducted Oct. 18-18, 2020.
Specific concerns about health and finances

Health concerns

- My physical well-being: 51%
- Health of my family: 59%

Financial concerns

- Making upcoming payments: 31%
- I'm delaying large purchases: 41%
- Losing my job: 28%

Deloitte: State of the Consumer Tracker, April 19 – October 3, 2020
When will behavior return to normal?

Deloitte: State of the Consumer Tracker, April 19 – October 3, 2020
Consumer Behavior by generation

Equally comfortable dining out

Far apart on movies and travel abroad
**Consumer Behavior**

What would make you feel comfortable again?

53%+ SAY A VACCINE

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<thead>
<tr>
<th>Requirement</th>
<th>Non-Member/Subscriber</th>
<th>Member/Subscriber</th>
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<tbody>
<tr>
<td>Mandatory face coverings</td>
<td>60.3%</td>
<td>72.2%</td>
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<tr>
<td>Availability of coronavirus vaccine</td>
<td>53.1%</td>
<td>59.4%</td>
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<tr>
<td>Ability to be outside/outdoors</td>
<td>54.9%</td>
<td>53.3%</td>
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<tr>
<td>Seeing others visit</td>
<td>37.5%</td>
<td>39.2%</td>
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<tr>
<td>Availability of treatments/therapies</td>
<td>34.4%</td>
<td>35.2%</td>
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<tr>
<td>No significant changes necessary - I feel safe and comfortable</td>
<td>31.4%</td>
<td>31.2%</td>
</tr>
<tr>
<td>Exclusive hours for vulnerable populations</td>
<td>26.2%</td>
<td>26.7%</td>
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<tr>
<td>Limits on crowds (e.g. limit attendance)</td>
<td>25.5%</td>
<td>26.9%</td>
</tr>
<tr>
<td>Availability of hand sanitizer</td>
<td>27.8%</td>
<td>24.5%</td>
</tr>
<tr>
<td>Organizations choosing to reopen</td>
<td>26.8%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Avoiding long lines of people</td>
<td>19.6%</td>
<td>15.8%</td>
</tr>
<tr>
<td>Government lifting travel, movement, access restrictions</td>
<td>13.1%</td>
<td>11.5%</td>
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<tr>
<td>Onsite health monitoring (e.g. taking guest temperatures)</td>
<td>7.3%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Knowing facility cleaning procedures</td>
<td>7.2%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Antibody testing/immunity passport program</td>
<td>3.5%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Elimination of onsite food service</td>
<td>2.1%</td>
<td>2.1%</td>
</tr>
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As of 1 September 2020, multiple choice, select all that apply, choices populated by lexical analysis.
Employee Availability Factors

**Health**
- Personal wellness, Family care
- Regular screening, reporting changes
- Return-to-work from illness/leave

**Behavior**
- Employee willingness to work
- Willingness to work certain jobs
- Ability to return – day care/school
- Attrition

**Job / Skills**
- Skills and staff inventory
- Shifting jobs to contractors
- Establishing contingent staffing sources/partners
- Hiring and training
- Bench depth
- Determining need (without discriminating)
Are people comfortable returning?

Source: Qualtrics, Return to Work/Back to Business Study, July 2020

61% Uncomfortable

Source: The Conference Board, September 2020
Are people worried about health and safety at work?

73% Very or somewhat worried

Source: Envoy, Protecting the Workplace survey, October 2020
How are employers improving safety?

How to Return to Work
A survey of 40 large employers found few are testing

Source: Pacific Business Group on Health

<table>
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<tr>
<th>Measure</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Conduct onsite testing</td>
<td>6%</td>
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<tr>
<td>Install plexiglass or other partitions</td>
<td>19%</td>
</tr>
<tr>
<td>Contact tracing</td>
<td>25%</td>
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<tr>
<td>Administer onsite temperature checks</td>
<td>56%</td>
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<tr>
<td>Administer onsite symptom questionnaire</td>
<td>69%</td>
</tr>
<tr>
<td>Require face masks</td>
<td>88%</td>
</tr>
<tr>
<td>Alter workplace to allow for social distancing</td>
<td>94%</td>
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How are school districts operating?

Education Week, updated September 15, 2020
School District’s Reopening Plans: A Snapshot

As of September 2, **73% of the 100 largest school districts, have chosen remote learning only as their back-to-school instructional model**, affecting over 8 million students. There are over 50 million public school students in the United States.


Over 900 school districts with links to their websites.
Evaluate – Policies, Procedures, Processes and Tools

- Data Collection
- Time Tracking
- Employee Scheduling
- Attendance Management
- Leave Management
- Keep up with Compliance
- Analysis & Reporting
Best Practice 1: Consider alternative timekeeping practices

Temperature Screening – Paid Time
- Special job code – record time and pay for tax purposes
- Have a consistent policy and threshold – e.g. 100.4 degrees

Health Attestation
- Ask question or read a statement
- Attest to being symptom free
- Prevent clocking in if symptoms exist

Contact Tracing
- Leverage time and schedule data to understand potential exposure
- Notify people and disinfect workplace

Data Collection from the Source
- Timeclock sanitizing
- Use of mobile for remote workers
- Use of facial recognition for hands-free identification
- Voice commands for hand transactions
- Proximity badge readers
Best Practice 2:
Revisit timekeeping rules

- Support time worked and time away from work for non-exempt and exempt employees
- Apply pay policies including new pay codes related to COVID-19
- Track and calculate premium pay and hazard pay
- Overtime requests and alerts, calculate overtime
- Document meal and rest breaks
- Provide attestation – breaks and health
- Accrue time off, provide balances
- Automate workflow for routine tasks
- HR and Payroll integration
Best Practice 3: Optimize employee schedules

- Optimizing for demand, availability, skills and preferences
- Schedule to demand as precisely as possible – minimize over- or under-scheduling
- Forecasting – can forecast with little data
  - Can do a % decrease across the existing forecast
  - Can budget-restrict the labor/staffing
  - Use shift patterns and templates to add new shifts and made large scale changes
- Quickly find replacements for absent workers
  - What if entire areas of workers need to quarantine and be absent?
- Collaborative Scheduling
  - Available Shift posting
  - Shift sign up, request and drop
Best Practice 4:
Revise and communicate attendance policies

- Attendance policy/points management
- Rewards and discipline tracking
- Sick and stay home policies
- Uniform policies - PPE
- Donning and Doffing
- Break room and rest room policies
- Hand washing, etc.
- OSHA
Best Practice 5:
Leave case management process and compliance

- Streamline leave administration
- Integrate with employee schedules
- Determine eligibility
- Trigger and store documents
- Support FMLA – continuous and intermittent leave
- Support federal, state and local leave laws
- Support company policy including STD, LTD, and more
Best Practice 6:
Brush up on new and existing compliance topics

- New and existing leave laws
- Exempt and non-exempt status
- Employee and independent contractor
- Pre- and post-shift activities
- Off-the-clock work
- Overtime
- Meal and rest breaks
- Recordkeeping
- Wage statement requirements
Best Practice 7: Closely monitor, analyze and manage absences and OT

- Role-based dashboards
- Analytics
- Benchmarking
- Predictive
- Standard reports
- Custom reports
- Ad hoc reporting
- Labor costs
- View actual, scheduled and earned hours
- Actual, controllable and forecasted OT
ADP Solutions to Help Implement Best Practices

Use touchless and mobile solutions to collect time data

Implement solutions to meet your needs for tracking employee:
- Time worked
- Absences
- Leave
- Schedules

Gain insight and make better decisions with reporting and analytics
Question and Answer
Thank you for attending!

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