

Case Study: Using VictorSchedule in a Full Service Restaurant

Lauren is a manager in a popular Italian restaurant located in Boulder, Colorado. One of her duties is to create, distribute, and maintain schedules for 30 employees. When she first heard of VictorSchedule, she was skeptical. Here's what she had to say before we got started:

"We're more dynamic than other restaurants, and there are a lot of 'unwritten rules' that go into making a good schedule for us. I don't think there's any way software could do what we need. I spend at least 4 to 5 hours a week on the schedule, and have to do a lot of thinking to make things work out sometimes."

After using the product for just a couple weeks, however, she was hooked. What used to take hours of work now takes her a couple of mouse clicks. This is what she says now:

"I can't believe how much time this is saving me. I like that I can get a schedule created and sent to everyone in about twenty minutes. The staff likes it too because it won't give them shifts they don't want unless there's a real reason, and that's easy to explain to them. They used to take it so personally sometimes, like I was out to get them if I scheduled them for a bad shift."

This case study documents in detail how VictorSchedule was setup for this restaurant to make such a dramatic difference, and how Lauren became a believer.

Step 1: Define the Qualifications

The first place to start when customizing VictorSchedule for your organization is with the Qualifications. Qualifications are what make a person a candidate for a particular task. Often times this is a little bit confusing at first, especially in settings like restaurants where there isn't really a formal qualification system (unlike in the healthcare industry). The best way to get started is to think of each of the tasks you need to schedule, and then think of which people you might assign for the task. When you have this list of people for each task, then think about what they have in common that makes them candidates to perform the task. Whatever that 'thing they have in common' is should probably be captured as a Qualification. Keep in mind that people can have more than one qualification! For Lauren's setup, we came up with the following list of Qualifications:

1. Server Level 1 – someone who has been around for awhile, is trusted and respected by the staff, and gets the more challenging (and rewarding) shifts.
2. Server Level 2 – someone who hasn't been around long enough to rate the primo shifts all the time, but isn't new either.
3. Server Level 3 – someone who is new or inexperienced, and typically works the less desirable server shifts.
4. Day Server – Someone that can work day shifts.
5. Night Server – Someone that can work night shifts.
6. Bartender – someone that knows how to mix a drink and has had training in the operations of the restaurant.
7. Busser – Lauren only has one type of busser.

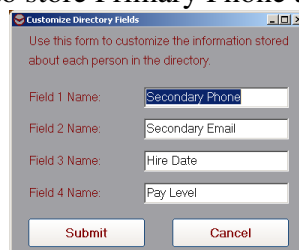
8. Food Runner – the people that bring out the food to the tables
9. Salad Maker – the people who prepare salads and silverware rolls.
10. Manager – the restaurant has two manager shifts per day, and only a few people are allowed to have those shifts. Lauren is one of them.
11. Catering Eligible – someone who can be sent on a catering job should one arise.

There's a couple of interesting things about this setup that are worth discussing. First off, notice that there are three different seniority levels of servers. Some shifts are only for senior servers and some are more suited to junior servers. Some senior people Lauren would never think about assigning to a junior shift, but some she might in a pinch. Conversely, some junior people can be used to fill senior shifts but others are too junior. VictorSchedule allows you to specify a person's 'suitability' for a particular qualification. In other words, Lauren can assign a person more than one 'level' qualification and then specify that they are more suitable for one or the other type of shift. That way VictorSchedule will know how the person should be used. We'll see an example of how this works in just a bit.

Another interesting thing about this arrangement is the 'Day Server' and 'Night Server' qualifications. At Lauren's restaurant, the hiring is generally done specifically for either days or nights, and there is relatively little overlap between the two groups of people. For other organizations it might not make sense to have these qualifications and instead to just establish a preferred shift start time for each person. For Lauren however, it made sense to include these qualifications since she generally thought in terms of people being on the 'night staff' or the 'day staff'.

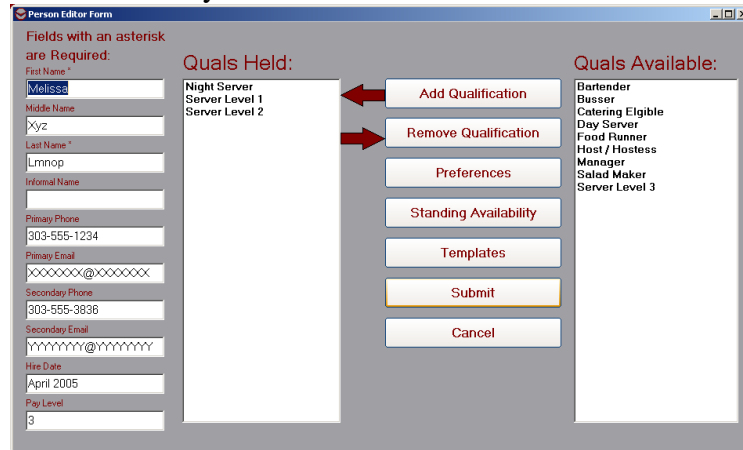
Step 2: Entering the Staff Members

Now that all the qualifications were defined, it was time to enter in all the employees that Lauren schedules. We'll go step by step (with screen shots) for how we set up a fairly typical employee at Lauren's restaurant. Before we get started with that, though, let's look at how VictorSchedule can be customized for your organization. From the Control Panel form, click on 'Preferences / Settings' and then select the 'Displaying People' tab. On this tab you can choose what details you store about a person and how you want to display people's names. Since Lauren's restaurant keeps things pretty casual and Lauren has a very approachable management style she chose to display people by their Informal and Last names. Then, she clicked the 'Customize Directory Fields' button to enter in the details she wants to store about each employee. See Screen Shot 1 below for the information Lauren decided to store. Note that VictorSchedule already has a place to store Primary Phone and Email for people.



Screen Shot 1: These are the custom fields that Lauren set up for her staff. These fields are available for each person in the directory.

After setting up what information should be stored about each person, it was time to enter in all of the people Lauren schedules. We'll look in detail at all the steps that went into defining one of Lauren's employees. To enter new people into VictorSchedule click on 'Manage Directory' from the Control Panel. This brings up the Directory Manager form. Next, click on 'Add to Directory'. In Screen Shot 2 you can see what information was entered for Melissa:



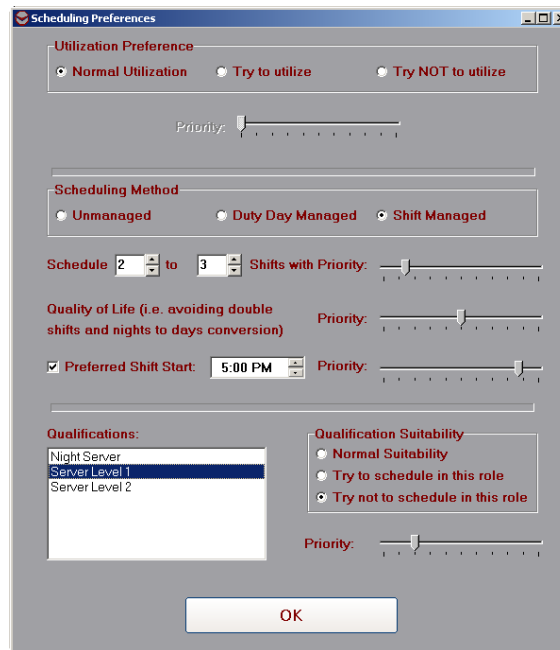
The screenshot shows a 'Person Editor Form' with the following sections:

- Fields with an asterisk are Required:**
 - First Name: *Melissa
 - Middle Name: *Xyz
 - Last Name: *Lminop
 - Primary Phone: 303-555-1234
 - Primary Email: xxxxxxxx@xxxxxx
 - Secondary Phone: 303-555-3838
 - Secondary Email: yyyyyyy@yyyyyy
 - Hire Date: April 2005
 - Flag Level: 3
- Quals Held:**
 - Night Server
 - Server Level 1
 - Server Level 2
- Quals Available:**
 - Bartender
 - Busser
 - Catering Eligible
 - Day Server
 - Food Runner
 - Host / Hostess
 - Manager
 - Salad Maker
 - Server Level 3
- Buttons:** Add Qualification, Remove Qualification, Preferences, Standing Availability, Templates, Submit, Cancel.

Screen Shot 2: The initial setup for one of Lauren's employees. All personal data has been changed for this case study. Note that Melissa is one of the Night staff, and she is relatively senior. We will see how we control which shifts Melissa will be assigned to when we discuss the preferences section.

One key thing to keep in mind as you assign qualifications to people is that you should give a person all of the qualifications that you would ever consider using a person for, even as a last resort. When we define Preferences for a person we can set up how we want to use the person. Also, keep in mind that whatever email is entered in the 'Primary Email' address block will be used to send schedules, so make sure you enter the right address!

Once the basic information has been entered, it is time to enter the person's scheduling preferences. Here, a brief discussion of 'shift managed' versus 'duty day managed' is in order. For most applications, making people shift managed is most appropriate. This is because most organizations schedule by shifts. Some organizations, however, schedule in terms of independent tasks and meetings, (which are generally of shorter duration than shifts). The rule of thumb is that if your organization has defined shifts where a person is typically assigned to work one shift per day, then making personnel 'shift managed' is most appropriate. If your organization schedules people by individual meetings or tasks, then usually making them 'duty day managed' is most appropriate. One notable violation to this rule has been seen in the field of nursing, where shifts are often 24 hours or longer. In such a case, control over on and off duty times is important, and duty-day managed nurses makes a lot of sense. For Lauren's restaurant, however, the clear choice was to make all employees 'shift managed'.



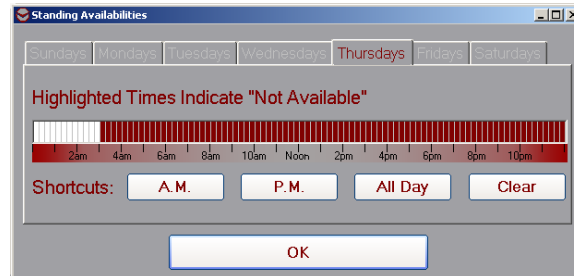
Screen Shot 3: Scheduling preferences for Melissa, a typical employee for this case study. Note that we have defined the number of shifts for Melissa to work, her preferred shift start time, and her amenability for working double shifts. Note also we established that we should try not to schedule Melissa in a 'Level 1' role. This means that VictorSchedule will attempt to use other qualified people in these roles first.

When defining scheduling preferences, we have the option to define a preferential use or disuse of each person. For this case study, we never had a need to do so, and all employees were left as 'Normal Utilization'. We also have the option to specify whether a person is 'Unmanaged', 'Duty Day Managed', or 'Shift Managed'. As discussed earlier, all employees in this case study were made 'Shift Managed'. Another choice we have when defining preferences is the 'Quality of Life' priority. Depending on where we set the priority controls how hard VictorSchedule will work to avoid double shifts and night-shift to day-shift transitions. Specifically the software will try to avoid assigning shifts with less than a 12 hour turn time between them. In general, Lauren set this priority setting according to the person's seniority. There were some notable exceptions, however, for example a senior person who enjoyed working double shifts, and a junior person with health issues. Both of these individuals had appropriate priorities set for quality of life.

The last thing to mention about setting up scheduling preferences is the 'Qualification Suitability' area. In this example, Melissa is a relatively senior person and gets the relatively good shifts. She is fully capable of working the more challenging shifts, but doesn't quite have the seniority yet. For this reason, we specified that VictorSchedule should try not to schedule Melissa in the Server Level 1 role (see Screen Shot 3).

Once we setup the scheduling preferences for Melissa, it was time to define her baseline availability. To do this, click on 'Standing Availability' from the Person Editor form. On this form, there is a tab for each day of the week. To define when a person is available and not available, simply highlight the times that they are unavailable on a given day. Whenever a new

schedule is created, people will be marked as unavailable according to their standing availability settings. You can of course edit and change their availabilities at any time. We'll discuss this a little more later. Take a look at Screen Shot 4 to see an example of how we set up Melissa's standing availability.



Screen Shot 4: An example of setting standing availability for a person. In this example, Melissa is marked as not available from 3am until midnight on Thursdays. Since the night shifts at this restaurant can go past midnight, we need to ensure that she is marked as available for the entire duration of the Wednesday night shift for her to be scheduled for it. Don't forget about this if your organization has shifts that span days!

Now we have a pretty typical person defined for this environment. Here's where Lauren started to make good use of templates. By selecting the 'Templates' button on the Person Editor, you can save the current person as a template to be used when defining future people. By saving a person as a template, you save all of their preferences and qualifications. This is very handy when you have people with similar roles and preferences in your organization. Next time around, all Lauren has to do is select 'Templates' and then apply the template of her choice to the person she's editing. Note that standing availabilities are NOT saved as part of a person template, since those generally are different for everyone.

Adding other people in is much like adding the first one, but the process gets much faster through the use of templates. All in all, Lauren defined 7 templates covering different roles and experience levels. She would use those templates as the baseline when entering in a new person and then just tweak as necessary. It took about 30 minutes for Lauren to enter in all 30 people she schedules. Since this restaurant scheduling situation does not have any resources that need to be scheduled, we were now ready to start defining schedules.

Step 3: Defining the Shifts

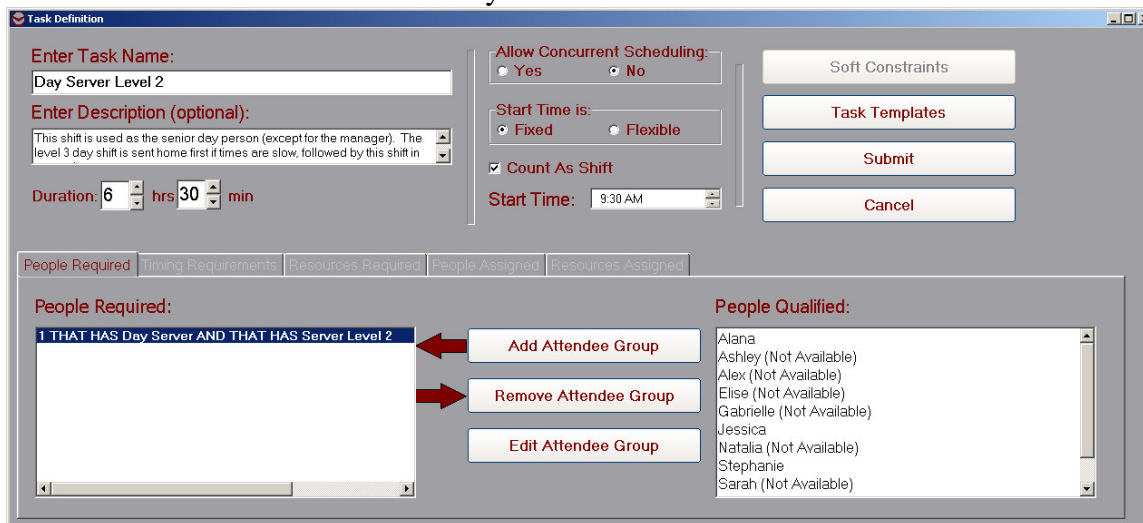
Part of the reason Lauren was skeptical at the beginning is that her restaurant is a very dynamic environment. Since it is located in a college town, events at the university have a dramatic effect on how busy the restaurant is on a given day. Whether it is a finals day, game day, or holiday make a huge difference to the number of servers that are required to handle the load. It also makes a huge difference on the availability of the staff, many of whom are students. We'll take a look at how Lauren was able to use VictorSchedule to handle the differing shift loads.

Lauren and the owners of the restaurant decide in advance how much staffing to provide during the upcoming week based on the season and events in town. A somewhat typical day might have the following shifts:

- Day Server Level 3 (9:30 – 4:00)

- Day Server Level 2 (9:30 – 4:00)
- Manager Day Shift (10:00 – 4:00)
- Night First Off Level 2 (3:30 – 10:00)
- Night Second Off Level 1 (4:00 – 10:30)
- Night Closer Level 1 (5:00 – 11:00)
- Manager Night Shift (4:00 – 11:00)
- Host / Hostess (4:30 – 10:30)
- Food Runner / Salad Maker (4:30 – 10:30)
- Night Busser (5:30 – 11:30)
- Bartender (6:00 – 12:30am)
- Patio (5:30 – 11:30)

This list frequently changes, however, based on the day of week and other factors already mentioned. Sometimes additional shifts are added, and sometimes they are removed or the times are altered. We'll take a look at some of the more interesting shift setups to see how they are defined. Screen Shot 5 shows the Day Server Level 2 definition.



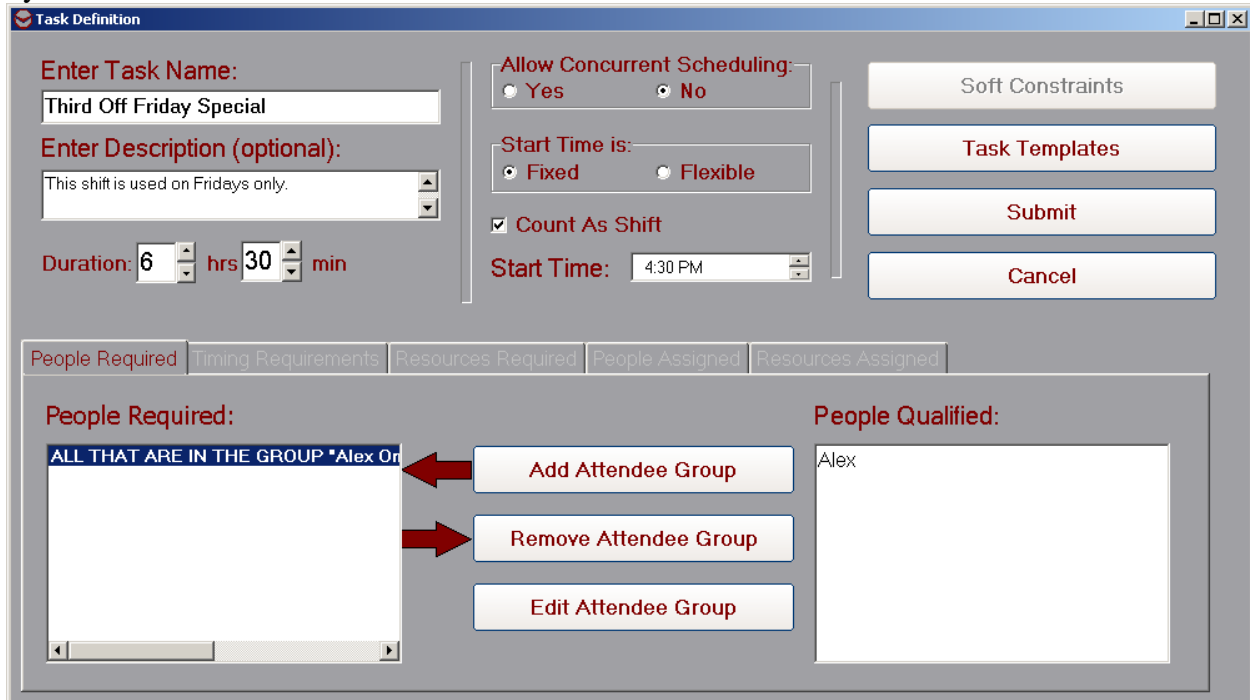
The screenshot shows the 'Task Definition' window for 'Day Server Level 2'. The 'Enter Task Name' field contains 'Day Server Level 2'. The 'Enter Description (optional):' field contains the text: 'This shift is used as the senior day person (except for the manager). The level 3 day shift is sent home first if times are slow, followed by this shift in'. The 'Duration' is set to 6 hrs and 30 min. The 'Allow Concurrent Scheduling' is set to 'No'. The 'Start Time is:' is set to 'Fixed' with a 'Start Time' of 9:30 AM. The 'Count As Shift' checkbox is checked. There are buttons for 'Soft Constraints', 'Task Templates', 'Submit', and 'Cancel'. Below the main form are tabs for 'People Required', 'Timing Requirements', 'Resources Required', 'People Assigned', and 'Resources Assigned'. The 'People Required' tab is active, showing a list with one entry: '1 THAT HAS Day Server AND THAT HAS Server Level 2'. To the right of this list are buttons for 'Add Attendee Group', 'Remove Attendee Group', and 'Edit Attendee Group'. The 'People Qualified' list on the right includes: Alana, Ashley (Not Available), Alex (Not Available), Elise (Not Available), Gabrielle (Not Available), Jessica, Natalia (Not Available), Stephanie, and Sarah (Not Available).

Screen Shot 5: The definition of the Day Server Level 2 shift. Note that 'Count As Shift' is selected so that VictorSchedule can manage the shift counts for people, the start time is Fixed, and 'Allow Concurrent Scheduling' is set to No. Also note that the requirements for this shift specify someone who is part of the Day Staff and that they have Server Level 2 qualification. This defines who is eligible to work this shift. When coupled with individual scheduling preferences, this is a very powerful and flexible way to specify who should be scheduled for shifts.

Through the use of the Qualification Suitability feature of VictorSchedule that we discussed earlier, it is easy to specify that an employee is suited or unsuited for a particular task. For example, the shift defined in Screen Shot 5 requires "1 that has Day Server and that has Server Level 2". This means that for a person to be considered for this shift, they must have both of the qualifications mentioned. Earlier we were discussing how some employees were pretty junior, but could be used in the Server Level 2 shifts in a pinch. By specifying that VictorSchedule should try not to use a particular person in the Server Level 2 role, we achieve this goal.

All of the shifts for Lauren's restaurant were created in much the same fashion. Screen Shot 6 shows another shift, this time for one of the shifts that is added depending on the day of

the week. This particular shift is unique because Lauren has made a deal with one of the senior servers that she will always be assigned to this shift. Although the practice is generally discouraged because it is less flexible than scheduling people by qualification, this shift illustrates how VictorSchedule can be used to specify that a particular person (or group of people) is always assigned to a task. Note the People Required box reads “All that are in the group ‘Alex Only’”. This is the sort of requirement that is generated when you schedule people by name to a task.



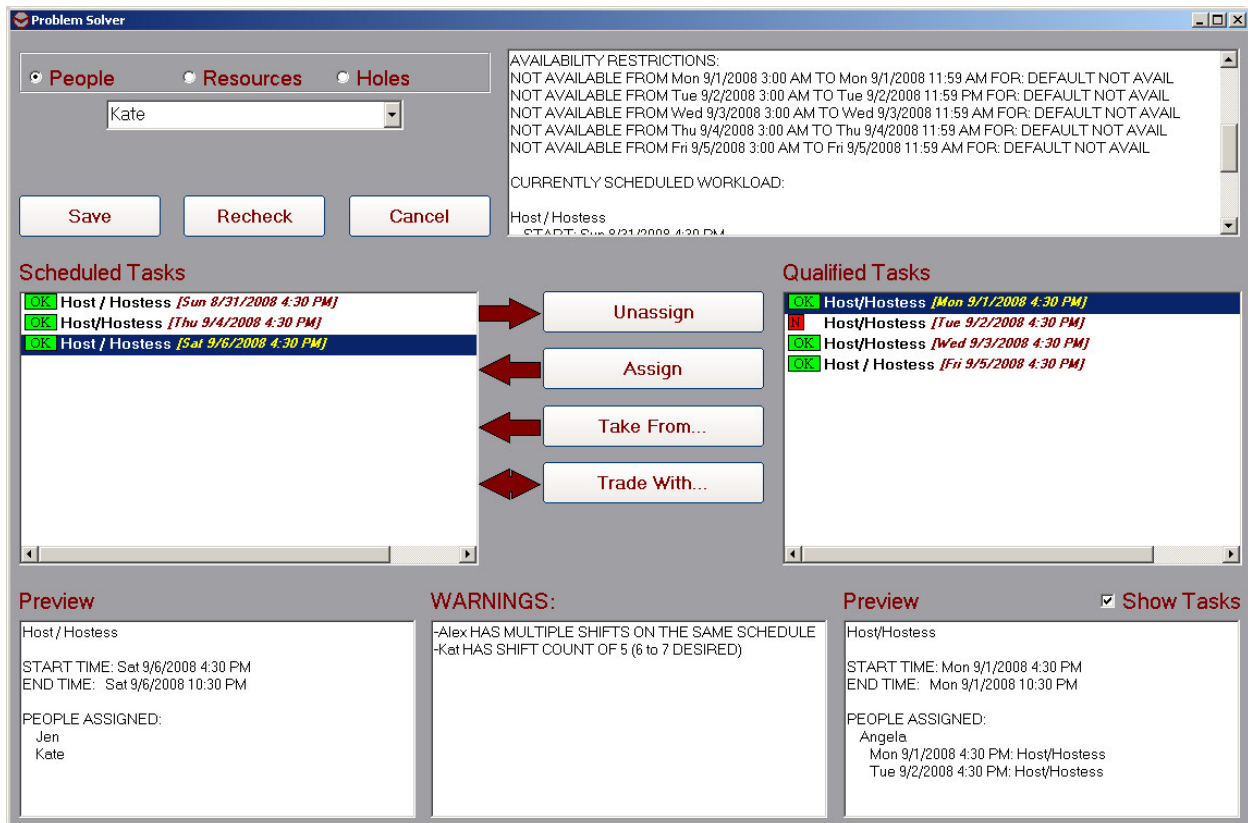
Screen Shot 6: Another example of a shift defined in this case study. This shift is different from most because it uses the ‘schedule by name’ feature available in VictorSchedule. Scheduling by name certainly has its place, but in general it is discouraged because it is less flexible than scheduling by qualification. This is because when a person leaves (or is not available) VictorSchedule cannot find a replacement if the task requires a specific person. If it requires a person with a qualification, the schedule can go forward if someone meeting the criteria is available.

Step 4: Using VictorSchedule

Now that the people and shifts were defined, it was time to start putting VictorSchedule to use in Lauren’s restaurant. Lauren already had something of a system in place. On Tuesday, she and the owner of the restaurant take a look at a calendar and discuss what sort of staffing levels would be appropriate for the upcoming week. By Wednesday, the staff knows that they have to have any off-time requests or availability restrictions to Lauren. VictorSchedule takes over from here, and makes Lauren’s job so much easier than before.

First, Lauren builds up a weeks worth of schedules matching the manning levels they discussed. Templates are a huge help here, as she has developed templates that apply to Game Day weekends, holidays, reduced manning, and all sorts of other contingencies. Then, she enters in all of the availability restrictions. This is usually a minimal amount of effort, since VictorSchedule has already created the ‘default’ availabilities for people when the schedules

were initially created. Next, Lauren simply clicks ‘Auto-Populate’ from the Schedule Workbench form. In less than 3 minutes, she has an optimized schedule for all of the shifts! It’s that easy! Her next step is to open up the Problem Solver form, and takes a look at each person’s workload to make sure it is what she expects. The Problem Solver also has the benefit of being able to very simply trade shifts or fill in holes in the schedule. Take a look at Screen Shot 7 for a view of the Problem Solver.



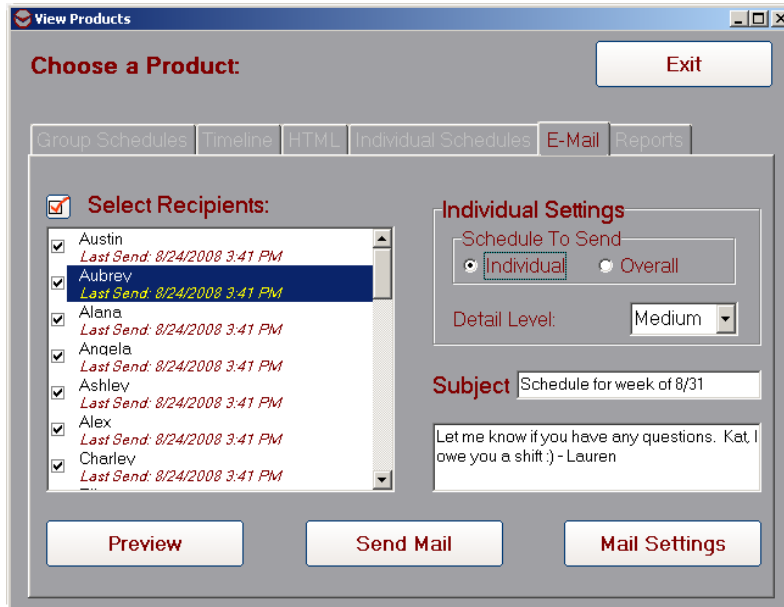
Screen Shot 7: The Problem Solver form looks a little bit intimidating at first, but it doesn’t take long for people to love it! A wealth of information is available in an instant. Above, for example, we can see the warnings generated from automatically building the schedule, we can see Kate’s workload as well as when she’s not available, we can see what other tasks she’s qualified for (with icons indicating if she’s available, and if the task overlaps something she’s already scheduled for). For each task she’s qualified for, you can see at a glance who is currently scheduled for it and what else they’re scheduled for. Trading shifts is just a button click, and any problems with the schedules are updated as you go!

When Lauren is done making any tweaks to the schedule, she saves any changes she made and then clicks “Publish All” from the Schedule Workbench. Take a look at Screen Shot 8 to see the options available for disseminating the schedule. What Lauren likes especially is the ability to click a single button and send email out to all of her staff. VictorSchedule can use a free web mail account to send out scheduling emails to everyone in the list. What’s more, she can send personalized emails to each person, including only the details that the person needs to see. For example, she can send a complete schedule to the owners and other managers, but only send individualized schedules to everyone else. Every week Lauren just needs to click on ‘Send Email’ and her entire staff is notified. She also prints out a timeline view of the shifts, as well as an overall schedule that she puts up on the wall in the Kitchen. She’s also looking in to using the



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HTML product to make the schedules available on the internet. Lastly, she saves a soft copy of the schedule for her records.



Screen Shot 8: The products that are available for publishing and disseminating schedules. Each tab in the above form represents a product that can be produced. In the above view, Lauren is ready to send out an email to the Primary Email Address of each one of her staff members. She can choose a detail level and type of schedule to send to each person. VictorSchedule also lets her print and save other products, such as a timeline view and HTML.

Summary

The bottom line is that VictorSchedule works very for Lauren in a full service restaurant application. What took her 4 or 5 hours a week before, now takes about a half hour. She's happier and her staff is happier, and she can spend more time on the multitude of other things that go into managing a restaurant. We think you'll be happy with VictorSchedule, too. Try it absolutely free for 30 days with no risk whatsoever. Just visit our website at <http://victorware.com/victorschedule.html>. Just click the Try It link, and take the pain out of scheduling.

