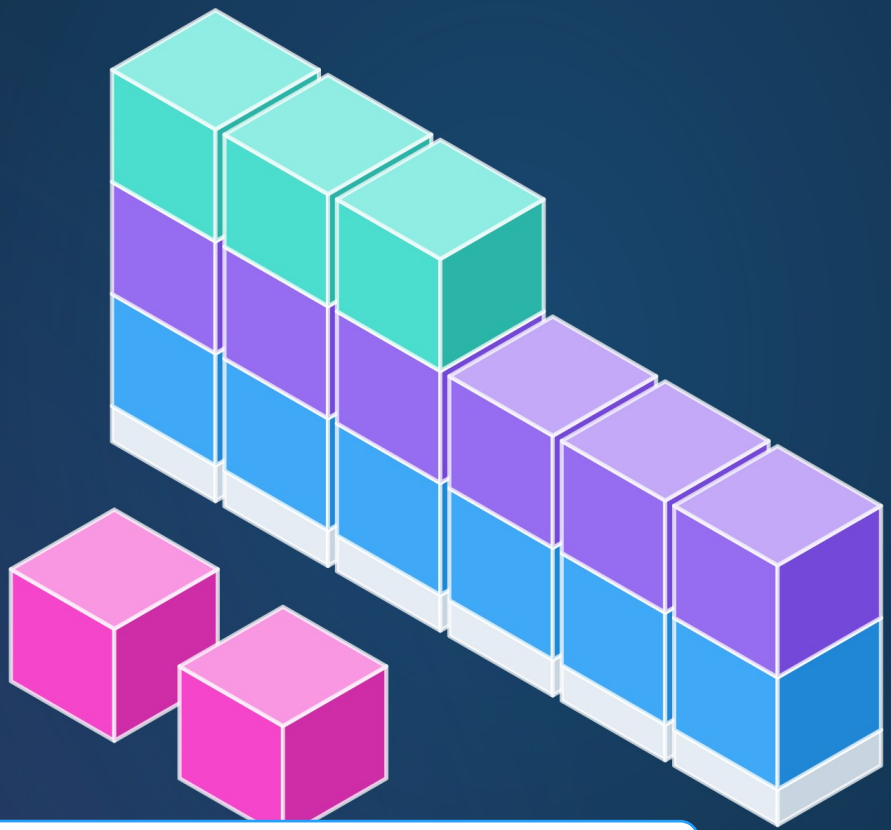
OPERATIONS INSIDER

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WORKFORCE PLANNING AND SHIFT SCHEDULING QUICK START CHECKLIST

Score the staffing of one production area in one hour, with numbers you can point at.



CALCULATE. CHOOSE. STAFF. CONTROL.

START HERE

How to Use This Check

One production area, one hour with the area manager and the person who builds the roster, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open the real documents: the requirement calculation, the absence figures, the current roster, the staffing board and the last month of overtime and agency hours.	Score each statement from 0 to 4. Without a calculation, a roster or a board you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across areas or shifts.
3	Mostly in place and visible in the data.
4	Consistently in place, visible, reviewed and improved.

> **WHY WORKFORCE PLANNING**
>
> **A production area can have the right machines, the right material and the right program and still miss its output, because the people who should run it are on vacation, sick, in training or not qualified for that station. Staffing is a calculation, not a hope.**

Before You Start

- **Scope:** one production area with its own stations and its own roster, typically 10 to 60 employees.
- **Evidence:** the production program, work content per product, the absence figures of the last twelve months, the roster of the last quarter and the overtime and agency hours of the last year.
- **Tone:** you check the planning system, not the people. Ask how the number of employees was derived, not who was missing last Tuesday.

THE CHECK

01 Requirement and Data

NO.	CHECK	SCORE 0 TO 4
01	The workforce requirement is calculated from the production program, the work content per unit and a measured utilization, not from last year head count.	
02	Work content per product exists as a dated figure and is reviewed whenever the product or the process changes.	
03	Utilization at the stations is measured at least once a year over several weeks, and the measured value is the one used in the plan.	
04	The requirement is calculated for the year and for every month, so that peaks and valleys are visible before they arrive.	
05	A program change above an agreed threshold triggers a new requirement calculation with a named owner and a date.	

02 Availability and Absence

NO.	CHECK	SCORE 0 TO 4
06	Net working time per employee and year is calculated from gross working days minus vacation, absence and training, and the figure is written down.	
07	The absence rate used in planning comes from the last twelve months of this area, not from a plant average or a guess.	
08	Time for qualification, meetings and area tasks is planned as hours instead of being taken out of the staffing when it is needed.	
09	An allowance for variation is set as a percentage, agreed with the area manager and reviewed once a year.	
10	Vacation and training are booked in a calendar before the roster is built, and the peak months of the year are protected.	

THE CHECK

03 Shift Model and Pattern

NO.	CHECK	SCORE 0 TO 4
11	The operating hours follow from the requirement, and at least two shift models were compared with hours, people, cost and burden before the current one was chosen.	
12	The shift pattern is written down as a rolling pattern, so that every employee can read their own shifts for the coming months.	
13	Working time rules, agreements and employee representation are answered by the responsible function before a model starts, and night and weekend burden is reviewed.	
14	The roster is published a fixed number of weeks ahead, and every change after publication is counted and given a reason.	
15	Night weeks, late weeks and weekend shifts are distributed across the crews by a written rule, not by who is available on the day.	

04 Qualification and Staffing

NO.	CHECK	SCORE 0 TO 4
16	Every station has a written minimum qualification, and the roster places only people who hold it.	
17	The number of people qualified per station is known, and a minimum coverage per station is agreed and tracked.	
18	Floaters are a planned position in the roster with a named person per shift, not whoever is left over.	
19	Staffing per station and shift is visible on a board that the shift leader completes before the shift starts.	
20	A qualification plan closes the coverage gaps with names, stations and dates, and it is reviewed every month.	

THE CHECK

05 Flexibility and Control

NO.	CHECK	SCORE 0 TO 4
21	The measures for peaks and valleys are written down in a fixed order with their cost per hour, and the cheapest one is used first.	
22	A working time account with an agreed band carries small peaks, and its balance per employee and for the area is visible monthly.	
23	A short daily staffing round decides the cover for the day before the shift starts, with a defined escalation for open posts.	
24	Overtime, agency hours and turnover are measured every month against targets and discussed with the area manager.	
25	Planning accuracy is measured as shifts staffed as published divided by shifts published, and deviations get a reason.	

Your Result

BLOCK	POINTS	OUT OF
01 Requirement and Data		20
02 Availability and Absence		20
03 Shift Model and Pattern		20
04 Qualification and Staffing		20
05 Flexibility and Control		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your staffing is calculated and how much is improvised. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Improvised. Head count from history, roster built week by week.	Calculate the requirement from the program. Measure your own absence rate.
40 to 59	Calculated once. A requirement figure exists, the roster ignores it.	Write the net working time down. Publish a rolling pattern three weeks ahead.
60 to 79	Planned. Requirement, model and roster fit together.	Close the qualification gaps. Agree the order of measures for peaks.
80 to 100	Controlled. Planned, qualified, flexible and measured monthly.	Hold the level. Review the model when the program changes.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after three months and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
WORKFORCE PLANNING STARTER KIT	The guide for the first 30 days in one area, plus the Excel calculator with program, availability, requirement and a shift model comparison with cost.
WORKFORCE PLANNING EXCELLENCE BUNDLE	The playbook, a two-day workshop pack, eight templates, the Excel system with stations, crews, staffing, qualification, peaks, time account and key figures, and a workshop deck.

Both are available at operationsinsider.com.