



NUCLEUS
RESEARCH

WFM TECHNOLOGY VALUE MATRIX 2022

ANALYST

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THE BOTTOM LINE

Continued difficulty in attracting and retaining a workforce, especially in hourly industries, has led employers to focus more on labor optimization and employee engagement. Leaders in this year's Value Matrix have responded to changing needs through renewed investment in automation and analytics across areas including scheduling and communication to help organizations do more with fewer resources while improving retention. Additionally, vendors have looked to keep up with constantly changing compliance regulations to help customers avoid fines and shift back to in-person work.



MARKET OVERVIEW

Over the last 18 months, organizations have faced difficulty in attracting and retaining quality talent. This has highlighted the need for solutions that help organizations optimize labor spend while improving employee engagement and wellbeing. Vendor investment throughout the past year has centered heavily on AI and ML capabilities that automate tedious processes and forecast scheduling needs. Other primary areas of focus include tools to navigate complex compliance regulations and integrations that enable the consolidation of solutions to fill in functionality gaps and improve data accuracy.

Since the release of last year's WFM Value Matrix, Nucleus found WFM customers are demanding higher levels of functionality in areas such as scheduling, employee self-service, compliance management, analytics and reporting, and labor forecasting. The most critical capability cited by users is the ability to optimize labor spend and forecast scheduling needs as labor cost represents an area where organizations can either overspend or save significant costs. Compliance management is another area where costs can quickly accumulate and having a solution that automatically incorporates compliance standards and regulations into schedules can significantly reduce the risk of noncompliance fees. As mass resignations continue to weigh on employers, reporting and analytics provide valuable insights to organizations about employee satisfaction, flight risk, and fatigue; which allows managers to better focus their retention efforts on the teams and employees that need it the most.

In this Value Matrix, Nucleus evaluated several WFM solutions that stand out in their ability to improve workforce efficiency for organizations. The Matrix positions vendors in the market based on the paired functionality and usability of the software and the value that it delivers to customers (Nucleus Research V67 – Understanding the Value Matrix, April 2021.) The WFM space is split between providers well-equipped to support complex use cases and the needs of larger global enterprises and those with functionality that is more tailored to SMB users.

LEADERS

REFLEXIS (ZEBRA)

The Reflexis One platform covers the full spectrum of WFM functionality, including scheduling optimization, employee self-service, time and attendance, and analytics and reporting. The vendor also offers a fully-integrated Task Management solution that is mature compared to other contenders in the space. Reflexis Workforce Scheduler includes capabilities such as labor budgeting, AI-powered forecasting, and advanced scheduling. The Reflexis platform is an attractive choice for organizations in retail, banking, and hospitality due to its ability to simplify store and branch operations and optimize labor spend. This, in turn, enables organizations to drive greater sales and customer satisfaction by better allocating available labor based on customer demand. Since its 2020 acquisition by Zebra Technologies, the vendor has integrated into several SaaS-delivered solutions targeted towards frontline workers. This includes the SmartCount inventory management solution, Zebra Prescriptive Analytics, and Workforce Connect frontline worker communication solution. The combination of the two vendors has given existing Reflexis customers access to more advanced capabilities to drive further value from their workforce.

Updates and announcements since the last Value Matrix include:

- In January 2022, Reflexis launched an innovative connector between their Workforce Scheduler application and the Microsoft Teams' Shift application. This seamless connectivity enables retailers and their store associates who use Microsoft Teams as their primary system of engagement to leverage the powerful Reflexis backend system and its advanced capabilities to publish work schedules, syncing in real time between applications. This optimizes how store managers and associates execute in stores, reducing the time spent on cumbersome labor scheduling and increasing the time spent engaging with customers, resulting in a more fulfilling experience for everyone.
- Reflexis also made significant improvements to the core scheduling functionality by enhancing shift policies and shift patterns in their workforce management engine to support increasingly complex scenarios. The solution now supports multiple fiscal calendar options for superior compliance with labor laws in EMEA and APAC countries. Reflexis introduced Shift Tags and Markers to enable better integration with external systems for appointments, trainings, and meetings. They have also added Workstation/Lane-level optimization for scheduling and improved in-store – customer satisfaction.
- Shift Trading functionality has been significantly improved in the latest release of the Reflexis Employee Self Service mobile application. Frontline employees can now utilize the new Shift Trade Board for shift bidding and shift swapping. Both options give employees greater schedule ownership and engagement as well as helps reduce employee attrition. They've also added new options that allow employees to embrace multi-store schedules, giving associates the ability to find additional shifts outside the home store, staying within a specified geo range.
- Reflexis continues to leverage the power of AI to improve the multiple facets of their Workforce Scheduling solution, including AI Budget Planner and AI Staff Planner.
- The newest release of Reflexis Workforce Scheduler includes an Annual Vacation Planner that helps frontline managers oversee vacation plans by employee groups. It employs a bidding process for vacation planning, creating vacation slots against peak days/holidays and takes into account factors such as seniority and rank.