



NUCLEUS
RESEARCH

WFM TECHNOLOGY VALUE MATRIX 2023

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THE BOTTOM LINE

Organizations that employ hourly workers are under intense pressure to keep operating costs low and productivity high. The ongoing uncertainty of the greater work landscape and economic climate make dedicated WFM solutions a critical means to optimize labor spend while reducing employee turnover and avoiding non-compliance fees. Leaders in this year's Value Matrix have doubled down on their investments in automation and analytics, specifically in complex scheduling and labor planning. Additionally, many providers have expanded integrations with other systems to minimize manual data entry and draw enhanced employee insights. As doing more with less becomes a staying reality, customers that take advantage of dedicated solutions for WFM will be better positioned to thrive amid market volatility.



MARKET OVERVIEW

Ongoing challenges in attracting and retaining frontline and hourly employees are now paired with economic uncertainty, pressing organizations to increasingly do more with less. The current environment has further underscored the need for Workforce Management solutions that optimize labor spend and allocation while mitigating unplanned overtime, compliance risk, and employee burnout.

Vendor investment over the past year has continued to focus heavily on AI and Machine Learning, specifically in areas such as labor optimization and complex scheduling. Customers Nucleus interviewed noted that as workforce conditions remain unstable, the ability to configure schedules based on a variety of unique factors is crucial to running operations as leanly as possible without understaffing or breaking compliance with regulations. Many vendors have also announced new or expanded integrations to add efficiency to processes between WFM, HRIS, and Payroll solutions. Reporting and analytics capabilities that leverage data across these systems can give employers and frontline managers a more complete view of factors that may be contributing to metrics including employee satisfaction, fatigue, and flight risk, and focus efforts accordingly.

In this Value Matrix, Nucleus evaluated WFM providers based on the relative usability and functionality of their solutions, examining the value achieved through the use of the product's capabilities (Nucleus Research V67 – *Understanding the Value Matrix* – April 2021.) The report is intended to serve as a snapshot of the WFM technology market, highlight the specific ways in which vendors are delivering value to customers, and take stock of what can be expected in the future based on current solution updates and releases.

ZEBRA (REFLEXIS)

The Zebra Workforce Management solution is well-suited to the needs of organizations in industries with large and complex workforces, including retail, banking, and hospitality. The solution includes functionality for time and attendance, scheduling, labor optimization, analytics, reporting, and employee self-service (ESS). Zebra also offers Task Manager, a fully integrated, real-time task management solution. Zebra acquired Reflexis in 2020. With these capabilities, managers can easily assign tasks to employees to improve productivity, standardize processes, and better align employee work with an organization's needs. The Workforce Scheduler solution was part of the Reflexis acquisition, which provides customers with AI-driven labor forecasting functionality, as well as advanced scheduling and labor budgeting capabilities. Users can leverage Workforce Scheduler to create schedules based on analytics metrics, such as customer demand, to reduce instances of over and understaffing while improving operational efficiency. Employee preferences are automatically considered when a manager generates a schedule to ensure that employee needs are met while staffing a location.

Zebra's employee self-service functionality helps improve engagement and reduce voluntary turnover by enabling employees to take greater control over their schedules. Users can also leverage Zebra to fulfill their frontline communication needs through its Workforce Connect solution which supports push-to-talk and cross-device communication capabilities. Zebra's combination of its WFM and Inventory management solutions makes it an attractive choice for organizations in the retail vertical.

Recent updates and announcements include:

- Zebra enhanced cross-store optimization and the ability to schedule shifts across multiple locations. The vendor also made improvements to its schedule cost calculation options using the RTA pay engine, which improves accuracy and real-time visibility into schedule costs.
- The vendor made significant UI updates to modernize its ESS mobile application. It also added support for Microsoft Teams Shift Connector.
- Zebra now offers full ADA compliance for ESS applications (Level AA.)
- The transition to the Google Cloud Platform (GCP) has given Zebra the opportunity to improve support and increase its Global Security Services posture. GCP supports a true “global footprint” and on-demand infrastructure, enabling Zebra to provide enhanced reliability, scalability, and availability.
- The vendor has improved payroll integration in DACH, including period-level pay rules, variable surplus and overtime pay rules, period-level overtime compensation, and public holiday prioritization. It has also addressed long-term leave and accrual enhancements for NALA.