

“I handed one of the ScheduleLabs licenses to our toughest critic of new products. This manager has been using it and likes the way it works for his department. He says the Employee Self Serve functionality actually increases employee morale.” – Rosalee Allan, Senior Vice President/Chief Operations Officer, PAML

## Pathology Associates Medical Laboratories



### Summary section:

After years of scheduling employees with an inefficient Excel spreadsheet solution, PAML's Patient Services ran a pilot program using ScheduleLabs from Maplewood Software. The successful pilot demonstrated significant ROI. ScheduleLabs saves time by automatically generating schedules based on required shifts, employee skills, and employee availability. The popular web-based vacation request capability has significantly raised employee satisfaction and PAML is initiating an enterprise-wide rollout of ScheduleLabs.

### Business Challenge:

Scheduling more than 50 phlebotomists and lab technicians across 18 sites was time consuming and potentially inaccurate. The labor-intensive, hand-built spreadsheet could only show a single view of the schedule. Vacation requests were often incomplete and many were denied due to prior requests. Every month, with clockwork regularity, the painful schedule creation process began again; PAML recognized that an automated, streamlined scheduling process was needed.

### Solution:

ScheduleLabs from Maplewood Software

### Results:

- Scheduling consumes 50% to 75% less time
- A ScheduleLabs schedule saves 3.5 administrative weeks per year
- Complete, balanced schedules are created in less than one minute
- Employee vacation requests have a high probability of approval
- Understaffed or unstaffed locations are eliminated
- Unintentional double scheduling was eliminated
- Multiple reports add business intelligence to the scheduling process
- Scheduling expertise easily transfers to backup administrators

### Maplewood Product(s):

ScheduleLabs

### Spending Less Time Creating Better Schedules

“We can now produce a complex schedule for a given time period with little or no trouble, and that's huge.”  
– Matt Swanson, Patient Service Center Manager, PAML

Servicing a five state region in the Pacific Northwest, Pathology Associates Medical Laboratories (PAML) is a highly successful reference laboratory with a well-deserved reputation for excellence. Continual improvement is ingrained in PAML's culture. Recently, PAML optimized its business processes with Maplewood Software's web-

based ScheduleLabs service in key departments.

In addition to rigorous laboratory science, a reference lab is a complex business process model operating under stringent safety, security, and quality guidelines. It also uses an efficient, geographically-dispersed collection network to gather samples and transport them to the testing location. Between specimen collection, delivery, accessioning, testing, results feedback, and final billing, a multitude of touch points can bottleneck or breakdown without proper employee coverage.

### **Finding a Functional Scheduling Product**

“Nobody understood the laboratory industry or realized, for example, that you might have multiple laboratories or different people assigned to different locations.” – Matt Swanson

About a year ago, Matt Swanson, the Patient Service Center Manager at PAML went searching for scheduling software. Swanson was feeling the pain of inefficient scheduling. He needed to make sure he had full coverage at each of his job sites without surprises. As Swanson says, “We wanted something better than the Excel spreadsheet we were using. It had faults that occasionally placed us in negative service incidents with clients.”

He searched online for scheduling solutions, downloaded some free demos and talked to various salespeople. His search results were disappointing, “There must be one heck of a market out there for scheduling hotel rooms and event centers. I didn’t find anything that would work for me. There just wasn’t an understanding of the laboratory field out there at all.”

Rosalee Allan, PAML’s Senior Vice President/Chief Operations Officer heard about ScheduleLabs in a meeting at an affiliate hospital. She thought the product might hold promise for departments at PAML with complex scheduling needs such as multiple locations, multiple stations, and courier vehicles. Swanson remembers, “Rosalee Allan felt that it was something we ought to look into, so my department and a

couple of others here at the main laboratory were chosen to pilot the product.”

### **Excel – The Bronze Standard of Scheduling**

“I had problems with my old Excel schedule. It was difficult to fill out, hard to search through, and it was unable to identify errors.” – Matt Swanson

Far and away, the bulk of scheduling in this country is managed with homegrown spreadsheets. Some contain sophisticated calculations, while most simply provide formatted cells for entering text. Generally, Excel-based schedules look tidy, but are deceptively difficult and time consuming to maintain.

“The old system was hand built and visually checked; it was easy to mistakenly schedule someone in two places. I’d get a call saying, ‘We’ve been open for an hour, where’s your phlebotomist?’ That is a phone call you don’t want to get.” – Matt Swanson

Matt Swanson’s spreadsheet schedule fell into the more common text-in-a-cell category. Swanson relates some of the difficulties that reoccurred every month, “We produced a four week schedule in Excel that had a page for each week. Each column defined a day of the week, and each row identified a particular site. The cell content contained the individuals who were supposed to work at that site on that day. We staff –depending on the size of the site and complexity of testing– anywhere between one and four people at a site. I have 52 people at 18 sites. We schedule five Linda’s, three Beth’s, and three Kathy’s. Of course not everyone’s full time, not everyone’s part time, and there’s some temporary staff in the mix. It got a little hairy.”

The Excel schedule was mind-numbingly detailed to populate. Swanson remembers the exacting, painful process, “The content of each cell was entered as continuous text. For example, if I had three people at a location, I had to painstakingly type Bob, alt-enter, Sally alt-enter, and Joe with a bunch of spaces so it lined up and was humanly readable. It was still hard to visually scan

names in a column to see if I had one of my floaters in two places on the same day. That was a problem.”

### **Intelligent Scheduling with ScheduleLabs**

ScheduleLabs uses an underlying model of the schedule. This model is differentially rendered according to the requirements of specific reports and views into the schedule.

“With automatic schedule generation, I no longer risk having somebody inadvertently scheduled to work in two separate locations on the same day.” – Matt Swanson

Matt Swanson took an immediate liking to the wide variety of reports and views ScheduleLabs supported, “One of the advantages of the software is that I can look at the Tag Report and see where Sue Smith is working today. In fact, I can look and see exactly where she’s working every day this week without hunting around to find her name. At the same time, I still need a report like the Location Report so I know who I have at one of the sites, and if the site is fully covered.”

### **Cleaner Vacation Requests**

“ScheduleLabs is a system with little opportunity for error. This is especially true with PTO requests; there are fewer misunderstandings.” – Matt Swanson

PAML has an internal mandate to become a paperless enterprise. An entire room is dedicated to scanning and shredding paper. In the past, to reduce paper in his processes Swanson tried putting PAML’s Vacation Request form on the local intranet. As he points out, this did not always increase efficiency, “If I put a Microsoft Word vacation form on our intranet, someone invariably saves it to their hard drive, and I can watch an almost Darwinian process of mutation as the form moves from person to person and PC to PC. Eventually a nearly unrecognizable form comes back. I can tell it’s still a fish but there are a couple of extra dorsal fins.”

ScheduleLabs has the advantage of being Internet based. It enforces a common

interface for submitting paperless vacation requests that are timestamped to a one second accuracy. The interface also ensures the fields are consistently filled out and required fields are never omitted.

Before ScheduleLabs was introduced at PAML, incomplete data on vacation forms led to creative sleuthing on the part of management. Swanson tells how special handling of vacation requests became a drain on management, “We would get a vacation form in without a name on it. We had to guess the name from the printed email address. People often entered the wrong date format for the beginning or end of the vacation so it could be confusing for when somebody was going to leave or come back.”

### **Better Vacation Management Boosts Employee Morale**

“The Employee Self Serve functionality actually increases employee morale because they can see the vacation calendar and put in vacation requests that have a high probability of approval.” – Rosalee Allan

If what management cares about is consistent vacation requests, then what employees care about is getting their vacation requests approved. Employees often have families, and putting forth the effort to synchronize household schedules to generate a vacation request, only to have the request denied, is extremely disappointing. ScheduleLabs contains an inherent success strategy for employee vacation request approval; it helps them request vacations with a high likelihood of being approved. ScheduleLabs does this by letting employees view the vacation request schedule. If they see the day they wanted is already crowded with requests, they pick a different day. Swanson says, “Since implementing ScheduleLabs, people have started to self-edit the requests, based on their ability to see what’s happening in the department.”

This ScheduleLabs feature is very popular with employees and hence management. Matt Swanson says, “Web-based access means they can also make these requests from home and that’s a huge advantage.”

People can pull up their spouse's calendar, their church calendar, and their kids' sports activity calendars and they can have it all right there. They can sit at home and figure out that maybe March 15<sup>th</sup> is not a good day to take off, but the 17<sup>th</sup> and 18<sup>th</sup> are great days so perhaps they could request those days instead. Another advantage of ScheduleLabs is that as soon as they put the request in, they get a confirmation message on the screen indicating it was successfully submitted. This takes away any uncertainty related to dial-up connections."

### **Customer Feedback Drives Improvement**

"There were very few negatives in the experience. Without a doubt, it was the most pleasant experience I've had working with a software firm, ever." – Matt Swanson

Typical enterprise software implementations require months of consultant time and staff meetings. Maplewood handles all installation issues and administrator training. At the conclusion of five tele-training sessions, the scheduling system is configured, up, running, and generating customer-specific schedules. This quick-start approach provides immediate productivity and cost-savings benefits.

Maplewood is constantly improving its scheduling software through active market research and customer feedback.

Swanson's operations supervisor was scheduling across 18 sites and needed a report that sorted employees by location. A Location Report was important to him, and, at the time, ScheduleLabs did not contain this report.

Swanson was impressed with Maplewood's response to his query about a Location Report, "I was pleased to find a firm that was both polite and responsive; that spoke volumes for me. I explained the details of the report to my trainer. She elevated my request and we now have our report, which, as far as I'm concerned, is indispensable."

### **Rule-Guided Automatic Scheduling**

Many off-the-shelf scheduling applications are little more than expensive spreadsheets

that get filled out each month. ScheduleLabs actually creates schedules, intelligently and quickly, according to the rules governing the department.

During training, the subtleties behind the organization's human-created schedules are captured and used to configure ScheduleLabs so it follows the rules to automatically produce schedules that match the thoughtful, manually-created schedules. The difference is that with ScheduleLabs a computer does the work in about 15 seconds instead of hours of human time.

Swanson was a little surprised as he went through training and started thinking about where his effort had been going when he created manual schedules using Excel, "I don't think we had any idea of the level of detail or the complexity of the decision making process that was going into our schedules."

### **Hard Costs ROI – Administrative Scheduling Time Reduced 50-75%**

Before ScheduleLabs was brought into the organization, Swanson or his scheduler were spending a significant amount of time in schedule-related tasks. Monthly schedule creation took 1.5 to 3 hours, depending on the number and condition of the vacation requests in the schedule. Using the old Excel schedule, the collective total of schedule creation and daily maintenance took between 30 and 60 minutes of a schedule administrator's day. The daily work included fielding and backfilling for sick calls, handling mid-shift departures due to sick children, and processing hand-delivered vacation requests. Matt recalls, "Excel scheduling was tedious; it was difficult to build a good schedule because we were constantly being interrupted. After moving to ScheduleLabs it now takes an average of 15 minutes each day to manage all our scheduling. Also, because it takes less time we have fewer interruptions and we can treat the scheduling time as a single unit of work. Schedule creation and generation is basically instantaneous and that lets us play with different possible scheduling models and try new things. Before, it was a huge effort to just get out a functional schedule."

A 50 to 75 percent reduction in time spent scheduling translates to hard savings. Over the course of a year, this works out to between 65 and 195 hours that are productively allocated elsewhere. This is very pleasing to Swanson, as the department scheduler is spending significantly less time building better schedules.

### **Saving Time, Saving Money, and Avoiding Pain**

“When you increase quality there is a dollar impact because your client stays with you and never considers taking their business elsewhere.” – Matt Swanson

ScheduleLabs produces a better schedule which has distinct bottom line value for PAML. Swanson explains, “Good scheduling helps me provide a predictable level of quality. Now I know my crucial shifts are covered. Poor service can lose a client. Stable scheduling figures prominently into my return on investment.”

The truth is, very few people take joy in scheduling; it is simply an unavoidable necessity –like death and taxes. Unlike death, it must be faced multiple times; unlike taxes an accountant cannot save your bacon.

ScheduleLabs eliminates the reoccurring sting from the cycle of schedule generation. Schedule administrators appreciate the time savings and the simplicity of schedule creation, coupled with the verification provided by multiple reports. Employees like the Employee Self Serve module that lets them check their schedules and put in vacation requests from home or work. With the success of the ScheduleLabs pilot, PAML is broadly adopting the ScheduleLabs solution. ScheduleLabs solves scheduling problems and raises both efficiency and morale. Additionally, as demonstrated at PAML, ScheduleLabs turns doubters into believers and tough critics into product champions.