

How to Build Your Business Case for Moving to Employee Scheduling Software

The ROI figures, the questions to answer first, and how to pressure-test your numbers before you present them.

Every workforce has its own pain points: poor visibility, payroll errors, inflexible rotas, rising labour costs. Whatever your starting point, the case for change is easier to make than most people expect, once you pair each challenge with the right evidence.

This guide walks through how to build a board-ready business case for a modern, assisted scheduling solution: the ROI stats to use, the questions to answer before you talk to vendors, and how a free [Scheduling Impact Analysis](#) can pressure-test your numbers before you present them.

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01 Introduction: How to Build a Business Case for Employee Scheduling Software



Ask any manager how many hours a week they lose to scheduling admin, and you'll get a sense of the opportunity in front of you. Assisted scheduling doesn't just save time. It's proven to reduce labour cost, improve fairness, and make frontline teams happier. But the number your leadership team wants to see is ROI: what will this actually be worth to the business?

The good news is that most operators, whatever sector they're in, are already comfortable with the idea that technology can help run better rotas.

The job of your business case isn't to convince anyone that smarter scheduling exists. It's to prove, with numbers specific to your business, what it's worth.

02 Where Do I Start?



This is one of the most daunting parts of your workforce management journey. You can't truly get to grips with what the market has to offer unless you have an idea of what the perfect world in your organisation looks like.

That doesn't mean you need everything clearly defined in a presentation with a sign-off from the C-suite. But it does mean being clear on what challenges you're trying to solve within your business. If you're reading this guide, you probably already have a good idea that a new workforce management solution is what you need, but there's a little more to consider first. We'd recommend being clear, and being able to answer these three key areas.

1. Identify Your Current Challenges

Start by reviewing your current scheduling process and tools, and be honest about what's working and what isn't. Are you struggling to fill gap shifts, manage employee availability, or keep a lid on labour spend? Build a list of the challenges you're facing and back each one up with a metric wherever you can. This becomes the foundation of your business case, and the building blocks of your future strategy. It's also a handy cheat sheet to keep to hand once the vendor meetings start rolling in.

2. Engage All Your Stakeholders

Don't build this case in a silo. It's likely your employees, managers and HR team are feeling similar frustrations with your current setup, just from a different seat. Gather feedback from each group before you commit to a direction: spend time asking future users what they need, what they'd like, and what's frustrated them about systems in the past. A short, free survey tool is often all it takes to make this quicker and easier. You'll probably end up with a long list of wants and dislikes, but the patterns that repeat across roles are the ones worth building your case around.



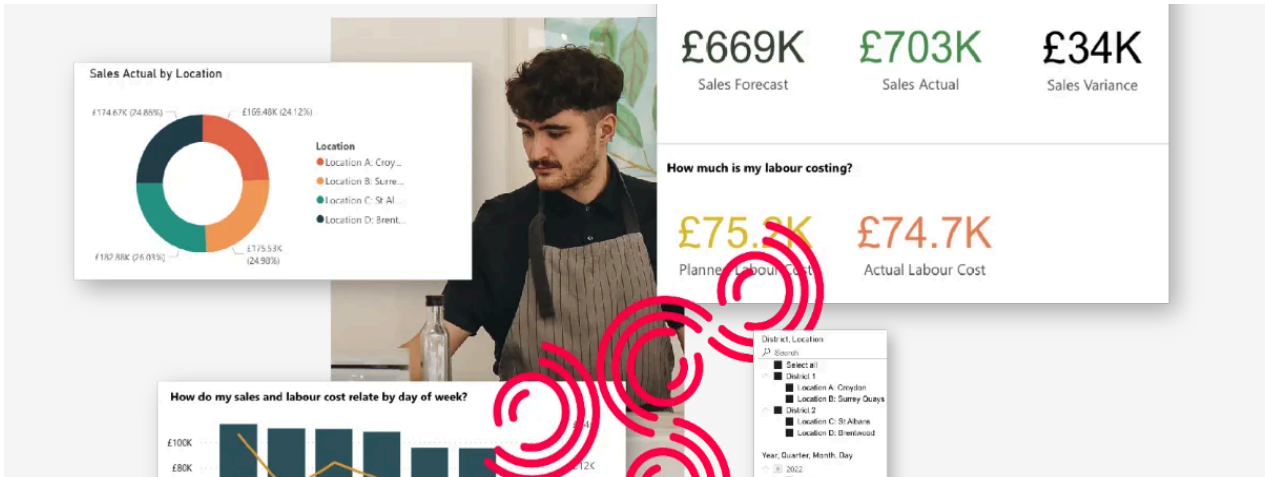
WHY THIS MATTERS

Frontline trust is one of the biggest predictors of whether a new scheduling tool actually sticks. Teams that involve managers and frontline staff early consistently see faster adoption and fewer issues after go-live, so this conversation is part of de-risking the rollout.

Before you start meeting vendors, borrow from what they've already worked out. Every provider worth talking to is producing free content to help you get up to speed, and it's well researched, so use it. Ours includes a [Buyer's Guide to Scheduling & WFM](#) covering what to look for before you switch systems, and a free [Scheduling & Workforce Management RFP template](#) you can adapt for your own vendor comparison.

Alongside solving the specific challenges your business faces, it's worth defining what your ideal solution looks like too. Of course you want to fix the functionality grievances, but if you had a magic wand, what else would your new workforce management solution do? Increase sales? Improve labour margins? Help with retention? You might assume software can't move the needle on goals like these, but a good workforce management provider should be able to speak to a broad spectrum of them

Better labour alignment has a direct, measurable link to customer experience, too. Sites are no longer left short-staffed during peak demand, or over-staffed with unmotivated teams during the quiet periods.



03 What Figures Can I Include in My Business Case?



It isn't enough to point at the obvious benefits. You need numbers. The most current, business-wide figures [Rotageek reports today](#) are a good place to start:

96%

say Rotageek is vital to daily operations

13%

weekly savings across labour cost and overtime

10%

increase in revenue

80%

reduction in manager time on admin

Below, those headline figures are broken down by benefit area, alongside real, named results from Rotageek customers.

Put People Where the Demand Is

This isn't about cutting headcount. It's about putting the right number of people in the right place, at the right time, so labour budget stops leaking into hours that don't add value. Get that right and it can unlock 13% in weekly savings across labour cost and overtime spend, using only a fraction of your existing staffing budget to get there.

[Lush](#) is a good example of this without cutting a single role. After moving off spreadsheets, one flagship store reduced staffing spend by 8% in a single quarter, simply by matching people to the site's real trading pattern rather than a fixed weekly template.

13%

saved across labour cost and overtime

8%

quarterly staffing cost reduction ([Lush](#))

Cut Schedule-Related Admin Time

Do you know how much time your teams spend creating rotas? Shift swaps, availability changes, gap-filling and amends across multiple teams add up fast, and it's time that could be reinvested elsewhere. Assisted scheduling gives most of it back: Rotageek customers report an average 80% reduction in manager time spent on administration.

The scale examples back this up. Across more than 460 stores and 7,500+ colleagues, [Pets at Home](#) store managers now build rotas in as little as 10 minutes using Rotageek's Autoscheduler, with more than 85,000 gap shifts filled to date. [Lush](#) saw a similar step-change after moving off spreadsheets: optimised rotas that used to take 2 to 3 hours to build manually are now created in around 30 seconds.

80%

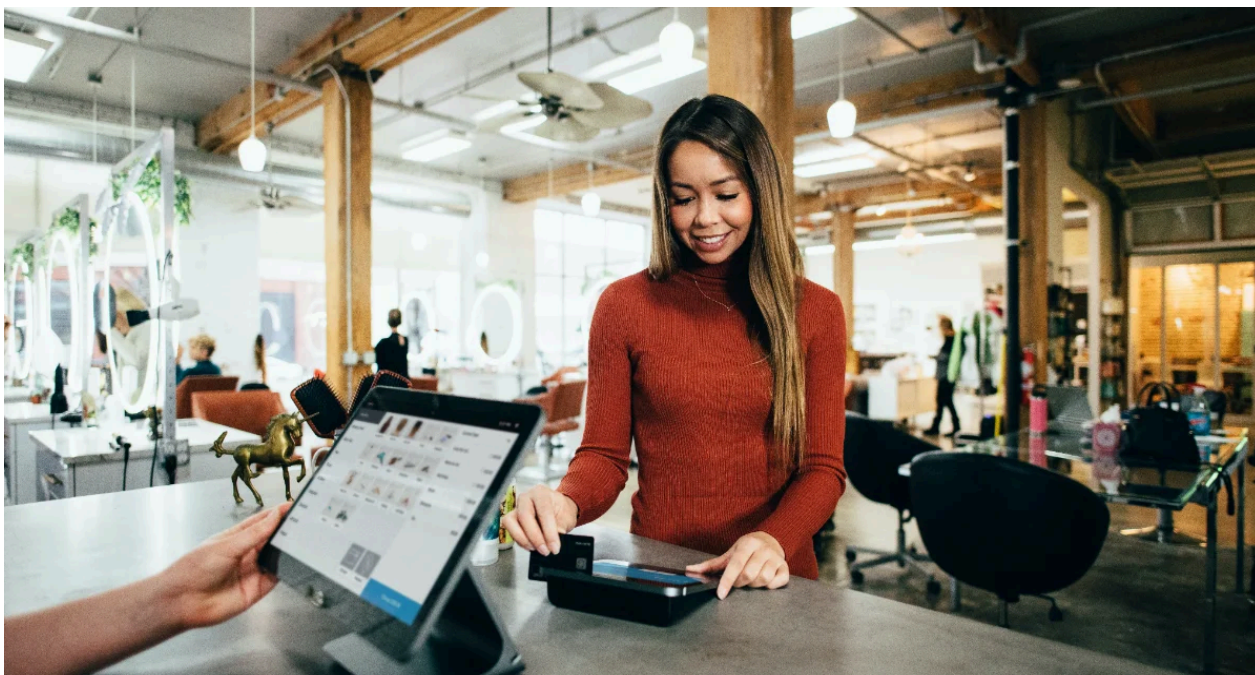
reduction in manager admin time

~10 min

to build a store rota ([Pets at Home](#))

~30 sec

vs. 2–3 hrs manually ([Lush](#))



Improve Customer Demand Match and Revenue

Every improvement in labour matching, whether by week, day or hour, directly affects a site's average transaction value. Automatic scheduling produces rotas that match customer demand far more closely than manually built ones: Rotageek customers report a 10% increase in revenue on average.

Lush's Birmingham flagship store put this into hard numbers via their [case study](#): a 16% increase in productivity in a single month, worth an extra £83K in sales at that one store alone, nearly £1m in additional annual sales once extrapolated across the year.

10%

average revenue increase

16%

productivity increase in one month (Lush)

£83K

extra sales in one month, one store (Lush)

For multi-market operators, better demand forecasting also unlocks better demand match at scale. [Sephora Middle East](#) integrated Rotageek's autoscheduling with its footfall data across more than 75 stores in five markets, so rotas are now built directly from real shopper traffic patterns rather than guesswork. Their flagship store, in Dubai Mall, is separately ranked as the highest-performing Sephora store in the world.

**Nearly £1m in additional annual sales,
from better labour matching in a single
flagship store.**

Reduce Turnover, Absenteeism and Payroll Error

Unfair or inflexible rotas remain a leading driver of turnover and absenteeism. Fairer, more transparent scheduling (visible on mobile, with self-service swaps and leave requests) measurably improves retention: Rotageek customers have reported up to a 5% reduction in unplanned absences week on week.

Time theft is a related, often overlooked cost. In an earlier illustrative example, one retailer was losing an average of 1.5 hours per store every week across more than 100 locations. Automatic scheduling paired with geofenced [time and attendance](#) eliminated this, saving £100,000 immediately, by only allowing staff to clock in and out for shifts on site.

1.5 hrs

lost per store, per week, before

£100k

saved immediately, after

Payroll accuracy is another quiet win. Manual timecard processes are prone to error, and errors carry cost and sometimes compliance risk. Scheduling software that integrates with payroll removes most of that risk: hours worked and confirmed are the hours submitted.

Reduce Compliance and People Risk

This one is worth its own line in the business case, especially if you sit in HR or legal. Manual rotas make it hard to prove, after the fact, that rest breaks, maximum weekly hours and fair distribution of unpopular shifts were adhered to. An automated system enforces those rules at the point a schedule is built, and keeps a clean, exportable record if you ever need to demonstrate compliance.

ONE LINE FOR THE BOARD

Every hour of admin removed, every unfilled peak covered and every payroll error avoided is a number you can put in front of finance. Put them side by side and the case stops being a preference and starts being a calculation.

04 What if You Already Have a Solution in Place?



Every business we work with is different, and that's the point: whatever the sector, from retail and hospitality to healthcare, leisure and public sector operations, demand has always been hard to predict. But the nature of that unpredictability has changed. It's no longer a handful of big, known peaks like Christmas. Organisations now deal with dozens of smaller, less predictable "micro-peaks" through the year, driven by payday weekends, weather, local events, term dates and absence.

That fragmentation is exposing the limits of older scheduling platforms, whichever sector you're in. A common weakness in legacy or semi-digital scheduling tools is a lack of accurate, responsive forecasting: the system assigns a fixed set of predefined shifts to staff, with little ability to adjust as demand shifts week to week. The result tends to go one of two ways: unnecessary labour cost from overstaffing, or poor service and stretched teams from understaffing.

This is where assisted scheduling earns its name. Using demand data, it factors in availability, work preferences, fairness rules and legal requirements simultaneously, producing a plan that works for the business and the people on the rota.

The goal isn't to remove the manager from the decision. It's to give them a strong starting point, and the visibility to adjust with confidence.

BEYOND RETAIL

Nando's

Replaced a 15-year-old internal system across 19,000 employees, and now moves resource from quiet periods into peak trading as demand shifts.

Merlin Entertainments

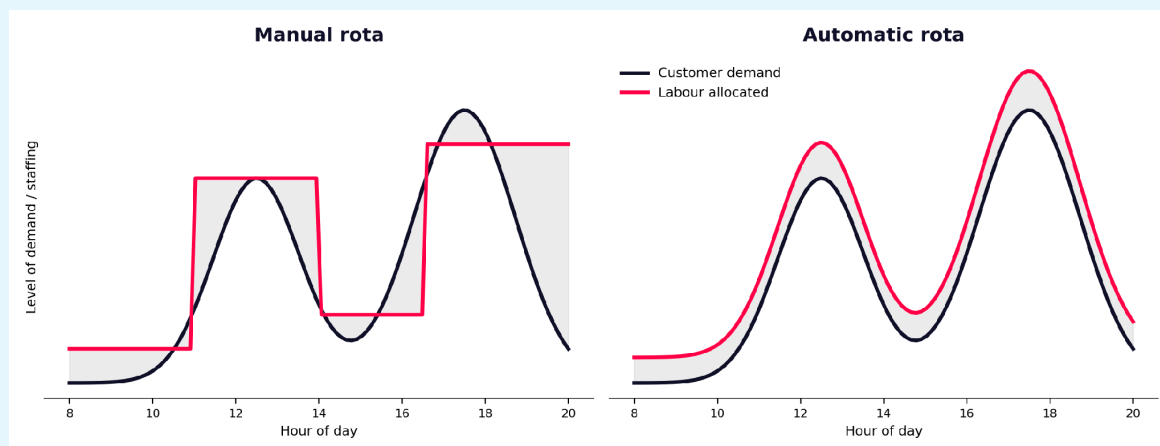
67 million visitors a year, and a week a month of rota-creation time saved with Autoscheduler.

Life Leisure

One consolidated view of rotas across 15 sites and 550 staff, with 4,600+ gap shifts filled to date.

Demand Forecasting, as It Should Be

A manager building rotas manually typically struggles to match labour to a demand curve that peaks and dips through the day, leading to a wide gap between staff on site and actual footfall. An automated approach closes that gap significantly, staffing accurately for peaks without wasting labour spend when things are quiet.



Illustrative example: labour allocated (**red**) versus customer demand (**navy**). A manual rota (left) tends to lag behind real demand; an automatic rota (right) tracks it far more closely.

How This Shows Up in Performance

In the case study behind the original version of this guide (an unnamed UK high-street retailer), an automated scheduling approach matched staff to target 14% better than manual rotas, translating into a 4 to 8% reduction in labour spend. The same retailer saw a 7% improvement in Net Promoter Score, along with measurable gains in conversion, basket size and total revenue.

14%

better demand match vs.
manual rotas

4–8%

reduction in labour spend

+7%

improvement in NPS

A Simple Solution to Flexible Working

Flexibility in a deskless workplace is easier said than done. Remote working isn't an option in a customer-facing environment, and shifts still need to be filled in advance, yet the need to meet employee needs hasn't gone away: the majority of staff now actively request flexible hours.

Thankfully, automatic scheduling provides the balance. By scheduling overlapping shift lengths to accommodate footfall, the technology dynamically creates varied start and end times. This allows more precise labour matching, and gives employees far more say over when they work.



A Fully Optimised Workforce

A typical scheduling system handles shift generation and shift assignment as two separate steps. Shifts get created, but aren't reliably filled, since there often aren't employees available without breaking a business rule somewhere.

When shifts go unfilled, the schedule was never really optimised in the first place.

An automatic scheduling solution does both at once, combining shift generation with shift assignment, so the important shifts and tasks are covered without violating a single scheduling rule.

Boost Your Employee Wellbeing

Flexibility matters, but employees want more, and rightfully so. They want control over their working hours, and a faster, simpler way to swap shifts or request leave than a chain of messages and manual sign-offs, something that saves managers time too, not just employees. A scheduling platform might put shifts in place, but a proper [workforce management app](#) takes a more holistic approach, giving employees real autonomy over their work-life balance.

71%

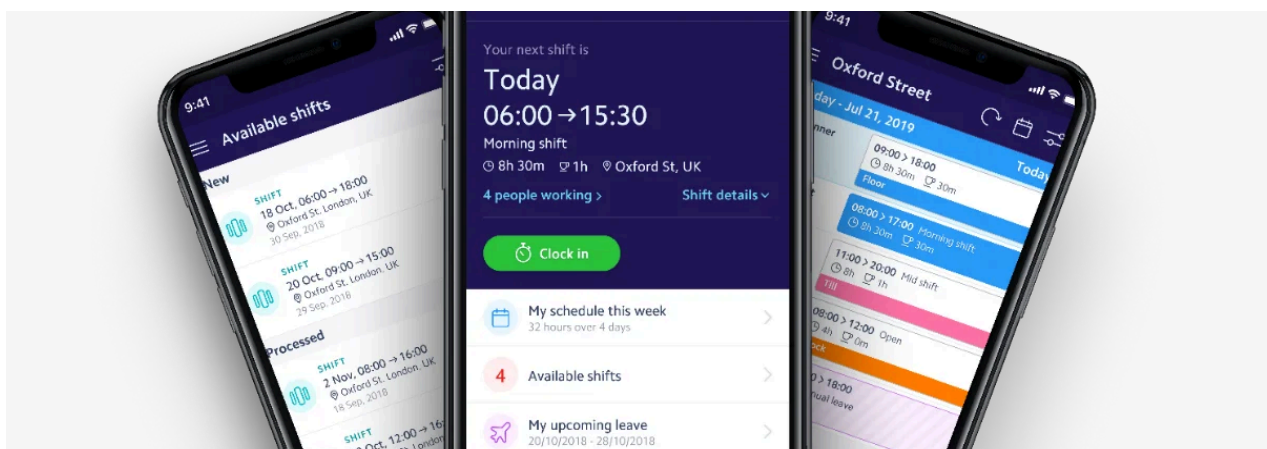
of frontline workers describe their scheduling as reactive, shaped by last-minute changes and fluctuating staffing levels

76%

would trust AI or intelligent scheduling in some form, as long as it's done with them rather than to them

That's from [Rotageek's own research into retail employee engagement](#), and the first figure directly affects service quality and customer experience. The same research found employees aren't against smarter scheduling, they're asking for it.

The self-service side of this is cloud based, making it accessible on a mobile app across a variety of devices. Staff can view, swap and request shifts on the go, which takes pressure off managers as much as it benefits employees.



05 Validate Your Case With a Scheduling Impact Analysis



The steps above will get you a strong, well-evidenced business case built from your own challenges, stakeholder input and industry benchmarks. Before you take that case to your leadership team, it's worth pressure-testing it against your own data, and that's exactly what a Scheduling Impact Analysis is for.

Rather than replacing the work you've just done, think of it as the validation step. Rotageek's team builds a tailored, board-ready report using validated, sector-specific benchmarks to model your likely labour waste, peak coverage gaps and the commercial upside of closing them. Head to the [Scheduling Impact Analysis](#) to get started.

Footfall patterns
typical for your sector

Payroll budgets
matched to your estate
size

Trading hours
standard for your format

It turns the business case you've built into a business case with numbers specific to your business. A much easier conversation to have with finance.

No data uploads, IT tickets or compliance sign-off required. The example figures below are illustrative annual estimates, but the methodology is the same one used to analyse your business.

16.5pp

demand-fit
improvement

77%

reduction in overstaffed
hours

2.2×

peak coverage
improvement

ILLUSTRATIVE EXAMPLE

£16k

annual opportunity per store

£2.6m

annual estate-wide opportunity

Here's Exactly How It Works, in Three Steps

- 1** **Share the basics:** your name, company and a rough headcount. No files or system access needed.
- 2** **Rotageek models the impact:** their team builds your baseline report using sector benchmarks matched to your estate.
- 3** **Review your findings:** together, on a 15-minute call, with an executive-ready summary you can take straight into your own business case.

No data uploads, no IT tickets. A board-ready view of what better scheduling is worth to your business, in **15 minutes**.



Estimated labour waste

Uncover the hours likely being deployed when they add the least value.



Peak coverage gaps

Identify where your busiest trading periods are currently under-served.



The commercial uplift

Quantify the exact financial impact of optimised labor deployment across your estate.



An executive business case

Uncover the hours likely being deployed when they add the least value.

06 What Does Implementation Actually Look Like?



This is usually one of the first questions finance asks, right after “what will it cost”: how long before we see any of this? It's worth answering it in the business case itself, rather than leaving it for the vendor conversation.

Rotageek's own onboarding is built around getting to value in weeks, not quarters. Implementation is discussed and agreed before contract signature, so there are no surprises on scope or timeline once you're in. From kick-off, rollout to location-wide go-live typically takes a matter of weeks, led by a team who have done this before rather than a generic project plan.

INCLUDED AS STANDARD

Support doesn't stop at go-live: ongoing, high-quality support covers every user, from head office to frontline managers, with no premium tier to negotiate for. The team also reviews how the platform is being used and feeds back practical recommendations to improve rota efficiency and compliance over time.

Weeks

to value, not quarters

All users

get top-tier support as standard

07 What About Data Security and Compliance?



If IT, information security or procurement are among the stakeholders you've engaged, this is very likely the first thing they'll ask about, so it's worth a line in the business case itself rather than waiting to be asked.

Rotageek's platform is GDPR compliant, and is ISO 27001 certified for information security, ISO 9001 certified for quality management, and Cyber Essentials certified, per Rotageek's own terms of service. Rotageek is also ISO/IEC 42001 certified, the international standard for responsible AI management, covering its AI-driven forecasting and autoscheduling tools.

GDPR compliant	ISO 27001 information security	ISO 9001 quality management	ISO/IEC 42001 responsible AI	Cyber Essentials certified
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For anything specific to your industry or business (particular certifications, data residency, or authentication requirements), your IT team can confirm the current detail directly with Rotageek's team as part of the vendor conversation.

08 About Rotageek



Rotageek is a data-driven workforce management platform that helps businesses build fair, demand-matched staff schedules using cloud-based technology.

Beyond core [Digital Scheduling](#), the platform spans demand [Forecasting](#), [Labour Modelling](#), [Autoscheduling](#), and [HR functionality delivered in partnership with ELMO](#), giving workforce teams one connected place to plan, schedule and manage their people.

Rotageek is built for multi-site, shift-based organisations of 400 or more employees, across retail, hospitality, leisure, entertainment, healthcare, care homes and beyond, including public sector teams. See more results across sectors on our [customer stories page](#), or read more on [why teams choose Rotageek](#).

09 Ready to Build Your Business Case?



Whichever stage you're at, here are your next steps.

01 • COMPARE

Free RFP template

Build an itemised, functionality-based comparison of vendors.

02 • RESEARCH

Buyer's Guide to Scheduling & WFM

What to look for before you switch systems.

03 • VALIDATE

Book a Scheduling Impact Analysis

A tailored, board-ready view of what better scheduling is worth. No data uploads required.

04 • TALK IT THROUGH

Book a demo

Or [speak to a Geek](#) first if you have a specific question.

Go and build the case for a smarter, more productive, more profitable scheduling solution.

10 Business Case Template

Use the template below to pull everything in this guide into a single one-page summary you can share with your leadership team or finance function.

1. The Challenge

Current scheduling method:

Biggest pain point(s):

Metric(s) that prove it (e.g. hours on admin, labour cost %, absence rate):

2. The Stakeholders

Sponsor / budget holder:

Key users consulted (ops, HR, frontline managers, employees):

Common theme from feedback:

3. The Goals

Primary goal (cost, revenue, retention, compliance, all of the above):

What good looks like, in one sentence:

4. The Numbers

£ <u> </u> estimated annual labour cost saving	<u> </u> hrs manager admin time saved per week	£ <u> </u> estimated annual revenue upside
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5. The Ask

Recommended next step (RFP, demo, Scheduling Impact Analysis):

Timeline to decision:

Budget range:

6. Notes
