# PROCESS OVERVIEW

Goodwill's Forecasting will only be used by Retail. UKG WFM uses 6-week historical data from each store to help generate optimized schedules. These optimized schedules are designed to help managers control costs for labor and working hours.

Understanding Forecasting

A. UKG WFM uses **Volume Drivers, Hours of Operation, and Special events** to general a **volume forecast** per store.
   1. The **volume drivers** Goodwill of Colorado uses are:
      a. Production Budgets (total items produced goals)
   b. Number of Transactions
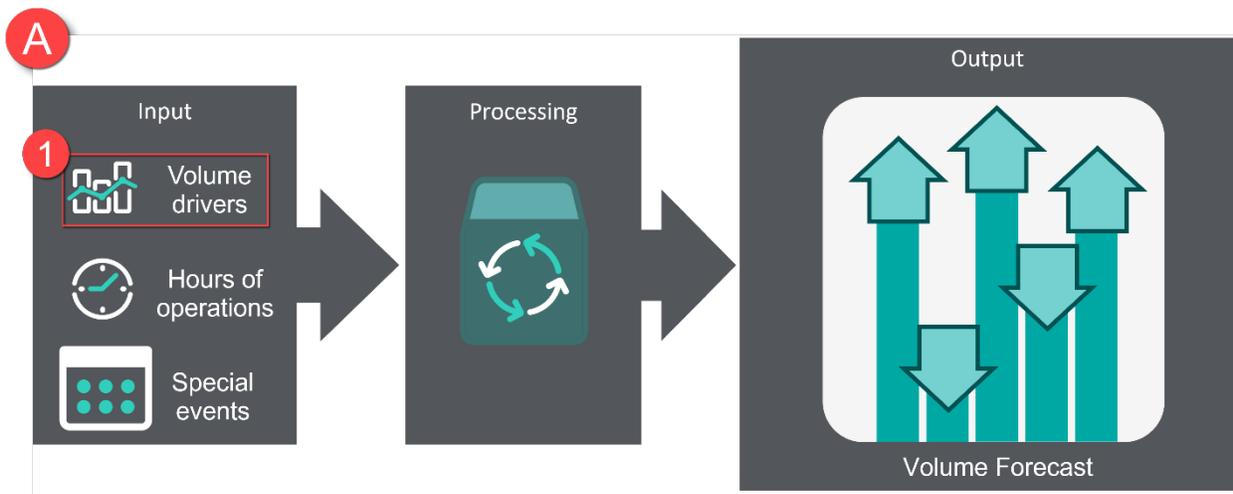
B. The **Volume Forecast** for a store helps decide **how many labor hours are needed** for the **upcoming schedule.**
   These hours are then used to figure out how many people are needed for **each job, each day,** and at **different times.**

   1. **Volume forecast:** Labor needs are based on how much work is expected.

   2. **Custom labor drivers:** Extra labor hours not included in the forecast can be added using custom inputs.

   3. **Labor standards and limits:** These help decide how much labor is needed based on the type and amount of work required to meet business demand.

Labor Forecast

		SUN	MON	TUE
		38	36	40
		40	40	42
		36	40	42
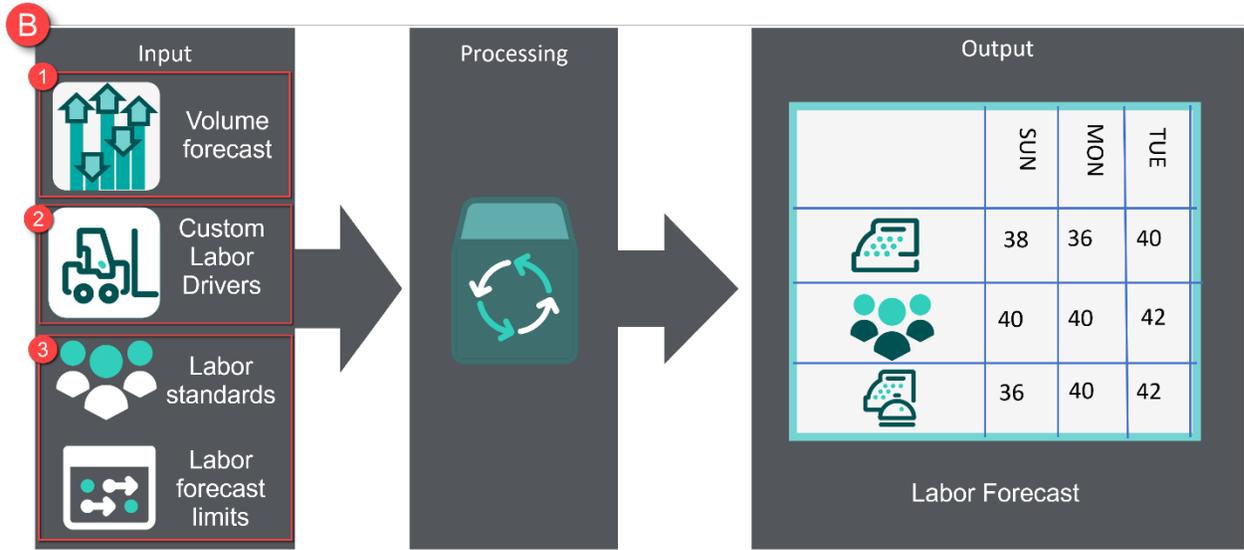
C. After the labor forecast is created, the scheduling system **builds an optimized schedule**. It follows rules like **shift length limits** and considers **employee availability** and **job roles**.

Optimized Schedule

	SUN
	8-4
	7-11
	7-11
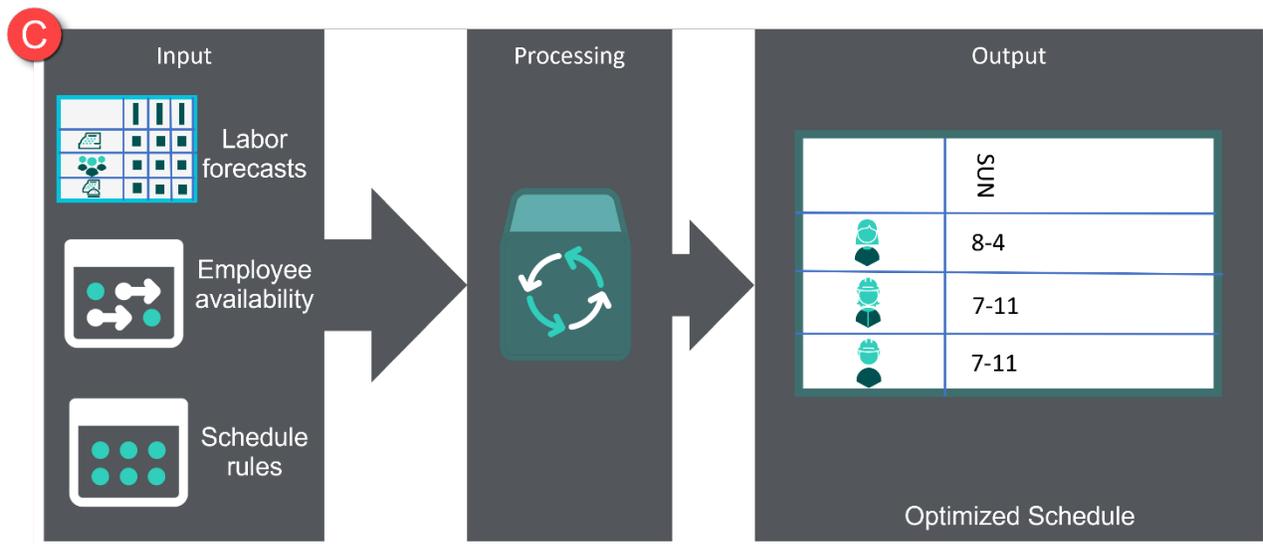
D. Once the schedule is generated, managers review the schedule to ensure it meets coverage needs and follows rules.
   1. Managers can adjust the generated schedule based on need and knowledge.

   2. Once approved, they post the schedule, making it visible to employees.

## Using Forecasting to Create Schedules

⚠️ **IMPORTANT**: **Retail leaders don't need to check the forecast planner often,** but they are responsible for making sure the data they provide is accurate.

A. To use the forecasting data to generate a schedule, navigate to the **Schedule Planner.**

1. Select the hamburger menu at the top of the screen.

2. Click **Schedule.**

3. Click **Schedule Planner with Absence Calendar.**
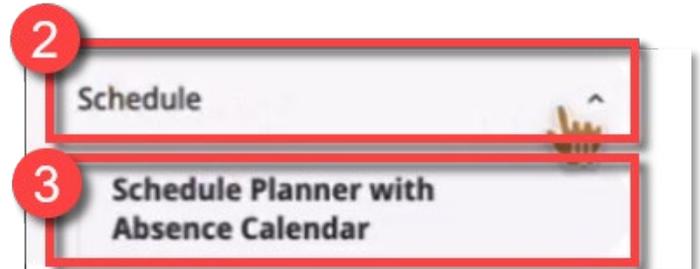
B. Click the button that says Generate Schedule on the toolbar.