

# How to Streamline Staff Management

Running a successful business requires more than having great products or services. It also demands a high-performing workforce.

But juggling staff management and high levels of productivity can be difficult. Especially when you have manual or outdated processes.

We're here to help. We've put together a step-by-step guide to streamlining staff management with Homebase

## Need an account?

If you haven't signed up for Homebase yet, before you jump into Step 1, you'll want to do that here.

Just follow the prompts, answer a few simple questions, and you'll be on your way

## STEP 1:

### Set up your Homebase account

To begin using the platform, create your business profile. This sets the foundation for your Homebase experience. Start here to set yourself up for success with staff management.

Here are a few things to know and do as you get started with Homebase:

#### Adding your team

When your team is imported, you'll be ready to start taking advantage of Homebase's powerful scheduling, time tracking, and workforce management capabilities.

**But there's one more action to take before you start digging into those features.**

Assign roles, access levels, pay rates, and other details for each team member. Then, you can invite team members to join the platform.

#### Using the dashboard

Once configured, you'll land on the intuitive dashboard that serves as your central hub.

Take some time exploring the layout, and understanding where features live. This is key for really taking advantage of what Homebase offers.

Getting familiar with the platform during this first phase will help you get up and running faster when you set up processes.

#### Things change

As your business grows, things might change—we get it. You can come back and make changes to your account setup at any time.

#### Starting with staff management

Now, think about what scheduling processes you or your employees struggle with the most.

Then you can identify the Homebase tools that can streamline your current processes, so you start seeing ROI right away.

For staff management, schedules are a good place to start. Navigate to that section to take the stress out of scheduling.

## STEP 2:

### Manage schedules

Homebase makes scheduling straightforward and stress-free. Our shift planning software program helps you manage your schedule. Build it within minutes from any device.

Here's how to schedule in Homebase:

- **Select 'Schedule' in the menu on your left.**
- **Hover over the day of the week and the employee you want and click 'ADD +'**
- **Choose Custom Shift, Common Shift, or Time Off.**
- **For a Custom Shift, enter the employee's shift details, including: Start and end time, the employee's role, days of the week, and any shift notes.**
- **Click the 'Add' button to add the shift to the schedule.**
- **To edit scheduled shifts, simply hover over the shift in the schedule. You can then move, edit, add, copy, or delete that shift.**

## STEP 3:

# Try time tracking

Do you have trouble making sure that timesheets are completed on time and accurately? In the timesheets area of Homebase, you'll find time-tracking capabilities. Homebase has 3 types of time clocks to choose from

## Mobile Time Clock

Let employees clock into their shifts right from their phones. By using the Mobile Time Clock, you can also access features such as GPS Snapshots and Geo-fencing to reduce time theft and stay on top of your labor costs.

## Web Time Clock

Turn any device or browser into a time clock. All you need to do is log into your Homebase account and launch a Shared Time Clock for your team.

## Tablet Time Clock

Similar to an old-school punch clock, you can mount a shared iPad or Android tablet within your business so employees can easily clock in and out.

### Here's how to update your time clock settings:

- Select 'Schedule' in the menu on your left
- Select 'Time Clock Options' under 'Time Tracking'.
- Follow the steps to enable the time clocks and settings that you want to use for your team.

## STEP 4:

# Enhance team communication

You can improve team communication by ensuring that your staff members are readily available and accessible when required. That means everyone is well-positioned to answer questions and provide updates on their availability.

### Here's how to use Homebase messaging:

- Open the Homebase app and navigate to the messages section.
- Select "New Message" and choose a group or individual
- Choose "start" to type and send your message to the workforce.
- Select the eye icon to access read receipts for your messages.

### Get organized with groups

Homebase will preconfigure groups for your business, like everyone working today or managers. Use these groups to get the word out about scheduling questions or changes faster.

## STEP 5:

# Monitoring performance and compliance

Legal compliance is crucial to properly running your business. Homebase will help you stay compliant in many areas of employment law. We also give you access to HR experts for any of your compliance questions. That way, you can tackle staff management with confidence.

### Here are some things to keep an eye on when it comes to compliance:

#### Time on the clock

Homebase allows you to meticulously track breaks, overtime, and calculate break penalties, ensuring accurate and fair treatment.

#### Complete reporting

With Homebase, all your data is compiled in reporting dashboards and summaries, offering a clear view of labor costs, sales, and productivity metrics, and highlighting potential compliance risks.

#### Alerts

Custom notifications can be set up to alert you about staff management issues before they escalate, promoting a proactive approach to workforce management.

## STEP 6:

# Maximizing features and integrations

Now that you're set up with all the basics for staff management, you can maximize the value of Homebase and discover new ways to improve your workflow.

### Once you're ready to uncover more capabilities, consider these options:

- Seamlessly integrate Homebase with your existing systems for smoother operations.
- Connect the platform with integrations to access more technologies easily.
- Use our dedicated support to connect your tools effortlessly. No tech expertise required.