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Mellow Mushroom: Stay Grounded or Schedulefly?¹

Was manual paper scheduling for employees the best option, or should the process of scheduling, giving up shifts, and requesting time off work go online?

One night in 2014, Mike, the head manager of Mellow Mushroom Tampa, paused from his exhausting evening to stare at the paper schedule posted on the wall. The schedule was covered in a mess of writing from employees drawing arrows to swap shifts, or asking others to pick up shifts. He had always tried to accommodate people's schedules, but the task was becoming stressful and exasperating. That night one of the employees scheduled to work had neglected to show up, and none of the other employees Mike called could cover the shift. This meant that Mike would spend the remainder of the evening filling in at the bar as well as covering a few tables. Meanwhile, he would still be dealing with customer questions and complaints. Mike wished this was a rare occasion, but at least once a month he would have no-shows, either due to a conflict with an employee's schedule, or because they did not even know they had been scheduled to work. Mike knew there had to be a way to fix the scheduling issues.

Usually employees covered for one another by swapping shifts, or adjusting the time they came in to work. However, that was not always possible. At times a "he said/she said" situation would occur, where one employee would swear he/she had switched shifts with another, while the other would be equally fervent in arguing that no such agreement had been made. Occasionally there would be text message evidence as a means of proof, but that did not happen often. Again Mike wished there was a solution to this problematic situation.

Recently, one of Mike's more reliable employees had brought up a possible solution. She had come to the Tampa location from a different Mellow Mushroom in Florida, where the entire scheduling system ran on a web-based service. According to the employee, everyone at her old location loved using the website, except the ones who had their overtime hours cut.

Mellow Mushroom Tampa had been using a paper method to schedule employees for nine years, so Mike knew he would have to make a solid argument to the owner if he was going to justify the change and added expense. The owner might think Mike was trying to make his own job easier at the expense of the company. Also, Mike would have to consider the potential problems with online software like glitches, costs and implementation issues. He would have to decide if this service was right for the Tampa location, and if so, how he could make a convincing argument for it to be implemented.

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Mellow Mushroom Franchise

Personnel management was a common obstacle for small franchises, as owners tended to have limited personnel management and scheduling experience. The difficulty of managing employee tasks and schedules becomes a constant burden for supervisors.

Franchises and the Restaurant Industry

Food franchises were considered to be the foundation of franchising. Approximately 57% of franchise industry employees worked in areas of quick service restaurants, full service restaurants, or retail food establishments, such as food trucks or catering companies. The consistent experiences of well-maintained premises, delicious food and fair prices in franchise restaurants provided customers good reasons to come back to these establishments again. After the recession of 2008, the food service spending in the United States decreased, but as economic conditions have improved in the past few years, more people have been dining out again. As per the “Consumer Expenditure Midyear Update,” from the *Bureau of Labor Statistics*, from July 2012 to July 2013, the average American household spending on away-from-home food was comparable to 2008 (“Food Franchise Industry Report,” 2014).

According to the *National Restaurant Association* (NRA), there was a 2,000 percent increase in the number of restaurants in the U.S. from 43,000 restaurants in 1919 to 990,000 restaurant locations in 2014 (Sweeney, 2014). Substantial growth in the food industry has resulted in businesses investing in technology software to improve the efficiency and accuracy of their businesses. The restaurant industry consisted of mainly small businesses that had a large impact on the nation’s economy. The NRA projected the industry sales to be a total of \$683.4 billion in 2014, which would account for about 4% of the US GDP (“Executive Summary,” 2014). The industry was also projected to employ 13.5 million people in 2014—about 10% of working Americans, in turn making the restaurant industry a large market for advancing technologies that optimized their operations.

Technology in the Restaurant Industry

Technology has been playing a vital role in the restaurant dining experience and weaving its way into the day-to-day operations of full service restaurants like never before. Customers have come to expect full service restaurants, franchised and non-franchised alike, to provide technology options that would make their visit efficient by providing them information to make decisions before they even walk through the door. According to research by the NRA (2014), 36% of consumers were willing to use technology more than they were two years ago, and 65% of them have noticed that restaurants have been providing these options much more than before. These options included online reservations, smartphone ordering and in-store kiosks. As these technologies have become more commonplace, customers have started recognizing the benefits. These options enhanced convenience, sped up services, increased order accuracy, and made restaurant interactions more fun for customers (see Exhibit 1 for smartphone restaurant activities).

Embracing new technologies was not always easy for restaurants. In many cases, the restaurant community faced challenges to offer customer-facing technology options due to implementation and per-usage costs. Smaller scale restaurants had difficulty investing heavily in technology options if they did not have the monetary resources. However, the franchising business model helped restaurant owners to share the burden of large investments across the franchising corporation. The software and hardware development industries have also been innovating technologies which were more robust and cost efficient.

In addition to customers having more technology options, many other operating technologies have been developed and used in the restaurant industry (see Exhibit 2: Restaurants Investing in Technology). Some were third party technologies, such as cloud computing software, and others were in-house technologies

developed by larger chain restaurants and franchise corporations. These systems provided users the ability to organize promotions, marketing information, social media updates and email blasts. These improvements could also speed up the ordering processes of inventory items, cut labor costs, and bring accuracy to restaurant operations like finance, accounting and payroll. Some of the systems integrated multiple operating aspects that increased the overall performance of restaurants from reducing operation costs to increasing customer traffic.

The most common technology systems used in the industry were:

- Accounting systems
- Point of sales systems
- Order processing systems
- Reservation systems
- Restaurant seating systems
- Online ordering systems
- Human resource management systems
- Payment processing systems
- Mobile Apps
- Online social media presentation and information
- Cloud based software

About Mellow Mushroom

In 2014, Mellow Mushroom was a 40-year-old company, owned by Home-Grown Industries of Georgia, Inc. with a 98% franchise success rate. The company was founded in 1974 in Atlanta, Georgia at the prime of the hippie era, and had broad range name recognition as one of the most relaxed atmospheres of any franchise chain. The chain was known for its high-quality ingredients and delicious food. The menu included salads, hoagies, calzones and of course, pizza. Mellow Mushroom also has food options for vegetarians, vegans, and those who follow a gluten free diet. Furthermore, Mellow Mushroom was known for their wide selection of craft beers on draft and in the bottle. They have often carried craft beers from local breweries, and modeled their restaurant décor and specialty pizzas after the location of the restaurant. The over 150 Mellow Mushrooms across the country all looked different and had exclusive menu items you could only get at their specific locations. Each owner of the franchise was granted a large amount of autonomy with regards to how they ran the store and managed employees. The main standards they needed to uphold to honor the Mellow Mushroom name were using quality ingredients put together by a well-trained kitchen staff. Things like scheduling employees, employee attire and other rules varied greatly between stores.

Mellow Mushroom Tampa

The Tampa franchise location of Mellow Mushroom opened on Sheldon Road in late 2005 when owner Greg Warren noted that the city was a prime location for such an establishment (Thomas, 2014). While not in the immediate vicinity of Mellow Mushroom's typical college neighborhoods, the Citrus Park community was a residential area full of patrons who appreciated craft beers and specialty pizzas. Since its foundation in 1974, the brand has continued to provide quality food, beer and service to customers who sometimes came from miles away to sample their ever-changing selection of brews ("History of the Mellow Mushroom," 2007).

The restaurant modeled itself with a focus on an artistic, laid-back atmosphere complemented by specialty pizzas and craft beers. A highlight of the establishment was the ingredients used, such as vine-picked tomatoes, hormone-free meats and dough made from Appalachian Springs water. In keeping with the Mellow Mushroom way, customers were encouraged to relax with a beer from the wide selection of craft brews, many from the local area in Florida. Each location was encouraged to be unique, and the Tampa franchise's signature was a variety of in-house pizza recipes as well as a wall mural tribute to 1970s San Francisco (Thomas, 2014).

While there have been a number of independent and chain pizza places in Tampa, none provided the eccentric atmosphere, unique recipes, natural ingredients and quality service that Mellow Mushroom prides itself on. Customers who appreciated these qualities would not be satisfied with similar offerings from competitors. They have addressed a specific niche market for pizza and beer enthusiasts who desired a deviation from mainstream restaurants, instead choosing the specific drinking and dining experience offered by Mellow Mushroom. The Tampa franchise has capitalized on this demographic by providing those specific qualities, which were accentuated by the friendly and attentive service that the establishment was known for.

Given Mellow Mushroom's nationwide brand recognition and specific dining experience market, the restaurant seemed like a sound investment from the owner's perspective, but he had no desire to manage it himself. Over the first several years of operation, the Tampa Mellow Mushroom saw a number of managers come and go, until 2012 when Mike took over the position. Mike had come to Mellow Mushroom from a local area bar that he had managed. It was there that he and the owner, Greg, had met and established a friendship, leading to Mike being offered the job as head manager of Greg's Mellow Mushroom in Tampa. The year and a half since that time had gone well. Mike got along with front and back-of-the-house staff, and his experience allowed him to operate the restaurant successfully. However, one of the few areas that remained a persistent issue for Mike was scheduling employees.

Scheduling Issues

Mellow Mushroom of Tampa had continued success over the past nine years, and most things were routine and ran smoothly. However, scheduling employees seemed to be a consistent problem that lead manager Mike had not resolved. Among all his responsibilities, scheduling was the most taxing and unfavorable. The biggest problem Mike faced with scheduling was balancing who wanted what shifts during the week. Some employees had relatively set schedules and availability, while others who traveled a lot, or went to school were changing their availability more frequently. Being the compassionate manager he was, Mike tried to make a fair schedule that would make the majority of employees happy. Inevitably, there would be a couple of people who relentlessly complained about the shifts, or lack of shifts they were getting.

Though this issue was his responsibility, Mike was not alone in his frustration with scheduling. Employees were also getting tired of the reoccurring issues they were having. A little over 71% of employees given a "yes or no" survey about scheduling responded "yes" to having had problems with their schedule (see Exhibit 3: Employee Questionnaire about Online Scheduling). When employees wanted time off, they were to write their names in a calendar journal that Mike would look at before he put together the schedule. Time off was given on a first come, first serve basis, or in this case, whoever had their name written first in the calendar journal under the date they wanted off. This was a problem because sometimes people who needed the shift off for more pertinent reasons, like a school function or family event, were passed over because someone had a party they wanted to go to, or just wanted a random day off. Being unable to signify why the request for days off was taking place, was therefore a disadvantage for people who had important obligations elsewhere.

When employees did want days off and could not get them, sometimes they could switch shifts among themselves. This was done by people exchanging numbers and contact information previously, and then texting another person to see if they wouldn't mind picking up their shift. Alternatively, employees could write on the actual paper schedule to let others know what shifts they were giving or picking up (see Exhibit 4: Sample Mellow Mushroom Schedule). Usually this was an effective way for one person to get a day off, and the other person to make extra money. However, things did not always go to plan. There had been numerous incidences where someone said they were going to cover someone else's shift, and then never showed up. This would make the other person look irresponsible, and seem like they were letting their coworkers down. For Mike, it was hard not to believe someone when they said another had picked up their shift, but most shift swapping was done without Mike's consent. So, without hard evidence or proof, it put Mike in a tough position for which employee to punish. Having a paper trail or some sort of software that could track shift trading, and require approval by a manager, could easily solve some of these issues.

In a survey given and completed by approximately 75% of Mellow Mushroom Tampa employees, most of them expressed the following as top scheduling issues:

- Trading shifts
- Requesting time off
- Having the schedule posted on time every week
- Not remembering when they worked, or to take a photo of the paper schedule
- Other's being annoyed when the same people always called and asked when they worked

Though some of these issues seemed petty and insignificant--employees being late, not showing up for work, or being frustrated--all had a large effect on their work performance, and how they treated their customers. Therefore, solving these issues was a priority for Greg and Mike because they both wanted the restaurant to run as optimally as possible.

Schedulefly

Cloud Computing

So what was "the cloud"? There were different types of clouds, however, the basic idea was that specific packets of data would leave a device, and then moved onto the network cloud comprised of different servers and wires. For instance, when an email was sent, the information or data was broken down into specific data packets. From the time the data or packets left one device, and until it reached its destination, it was in "the cloud." Data pieces were then reassembled on the receiving end. Frequently, all of these packets would not travel across the same pathway through the network cloud (Beal, 2014).

Cloud computing also took advantage of the ability to reduce data into specific packets. If there was a math problem with one hundred distinct steps, and each step took one second for a computer to solve, then it would take one minute and forty seconds for a single computer to "compute" the answer to the entire problem. Yet, if we linked or networked one hundred computers, and assigned each of them one separate part of the math problem, then they would solve the problem in one second.

Any networked servers or computers could potentially be used to enable cloud computing. Rarely was any single computer or server operating at its maximum computing or storage capacity, therefore there

were often additional packets of data that could be processed or stored on a server. One email, for instance, with all of its packets of data, was not processed on one server; it was separately processed across numerous servers. This processing by numerous different servers was the basic idea of cloud computing. Furthermore, if different sets of servers were used to store data, this was called cloud storage.

Cloud storage took the same technology of separating data down into small packets, and then distributing the small packets across a set of servers. By storing data this way, there was potentially no need for organizations to maintain servers of their own. An organization's data could be stored offsite for a simple storage fee rather than paying for servers and the associated maintenance and technical costs.

By incorporating cloud technologies, a business could outsource the cost of maintaining networks for storage or computing power. The organization would just need a device that had access to the network, such as a laptop or tablet with high speed internet access. The ability to scale the needed computing or storage power quickly was one of “the cloud’s” greatest assets (“SAP Data,” n.d.).

The ability to connect customers to businesses and businesses to their employees was another great asset of cloud computing. Furthermore, decentralizing and dis-integrating the organization’s information systems’ users cloud based software allowed users, whether employees or customers, to access the data or computing power they needed to interact and accomplish their goals. With software as a service (SAAS) on the cloud, the user got the necessary data on the smallest and cheapest platforms, but if they needed major computing power to answer an analytical or technical problem, then the cloud could enable scalable computing as well. So, Mellow Mushroom employees could use a cloud based service to access their schedule from home or their mobile device, and not have to be at the restaurant to modify the schedule. In addition, Mike could also have real-time access to the schedule and its current updated state 24/7.

Still, there were numerous obstacles and concerns with the adoption of a cloud based computing and storage system over a traditional server based system. The greatest of these, for Greg, was likely the need for high speed Internet access, and the associated question of contractual liability that goes along with a cloud vendor. The need for high speed access would decrease the cost of onsite computing hardware, but it also removed the ability for the organization to control how fast its data or computing power would come back “online.” If Schedulefly’s site crashed or was inaccessible for some reason, the Mellow Mushroom would have very murky legal recourse for redress of grievances. This potential unreliability of Schedulefly gave rise to management concerns in the adoption of cloud computing services.

Another fear Mike had was the possible lack of data security in cloud systems. Due to the lack of in-house control, another individual could potentially gain access to proprietary or sensitive data. Again, this would become very difficult to litigate, especially when considerations of jurisdiction came into play. If Schedulefly was hosting the service in a foreign country to take advantage of reduced cost, the lack of liability and independent data security could cause Mellow Mushroom Tampa to lose its data.

Cost was another concerning factor. Often franchises feared that the promised savings would not materialize due to vendor cost creep. As cloud computing became the industry standard, businesses feared that their data might be held “ransom” without having physical servers. Another cost was the changeover from servers to Cloud vendors. This was likely to be recouped in time as replacement servers were no longer required to be purchased or maintained.

Online Scheduling Software

Online scheduling software stemmed from the human aspect of Enterprise Resource Planning (ERP). ERP was the term coined in 1990 to refer to the advancements made on Materials Requirements Planning software designed to handle materials in an industry (“What is ERP?”, 2001). ERP software extended

beyond materials into areas such as accounting and human resources. While employee scheduling software was usually part of an ERP package on a company's internal server, online scheduling allowed members to utilize that software via cloud computing, and gave access to employees over the internet.

As industries became more acquainted with the use of online resources from the late 1990s to the early 2000s, scheduling services became available at various points during this period. One such website, HotSchedules.com, boasted of providing this service to managers since 1999 ("About Us," n.d.). Other providers included Workschedule.net, ShiftPlanning and Schedulefly, most of which began operations in the early 2000s and marketed primarily to restaurants (see Exhibit 5 for 2014 best employee scheduling software).

As seen in the aforementioned exhibit, Schedulefly was not even in the top 12 of online scheduling providers. The number one site, ShiftPlanning, boasted of being "incredibly easy to use," while offering a variety of services, from payroll to vacation management, time clock tracking and of course, scheduling ("Product Tour," 2011). However, this site would cost an extra \$27 per month ("Pricing," 2011). Additionally, due to in-depth employee profiles, ShiftPlanning would take longer to set up than most other options ("ShiftPlanning," n.d.). With the second highest rating ("Nimbleschedule," n.d.) Nimbleschedule charged \$75 per month (\$35 higher than Schedulefly), and offered fewer reporting options than a number of their competitors ("Pricing," n.d.).

WorkSchedule.net, on the other hand, charged \$15 less per month on an auto-renewal basis, with prices dropping to as little as \$18.75 per month with an annual subscription ("Pricing," n.d.). While these prices were enticing, the required one-year obligation could be too great of a commitment for a laid-back Mellow Mushroom franchise owner. It was also worth mentioning that these prices did not include phone support or training, which were an extra charge. Additionally, this service did not track labor cost, nor did it provide a mobile app (Workschedule.net, n.d.). In a work environment where most employees used mobile devices for the better part of their internet usage, the lack of a mobile app was a significant disadvantage. Therefore, based on price, conduciveness and history with the corporate company, Schedulefly remained the most appropriate choice for the Mellow Mushroom franchise if they decided to use an online scheduling program.

Schedulefly

Schedulefly started in 2007 when founder Wes Aiken used his programming skills to create an online service for restaurant employee scheduling ("We're 5 Guys," n.d.). Having worked in restaurants years before, Aiken understood the frustrations managers faced in filling out schedules for their employees. After establishing his brand, Aiken and his team tried a variety of traditional approaches in spreading the word about what their service had to offer restaurant managers, but to little avail. Deciding that the mainstream methods were far too conforming, his group began to instead market themselves as an independent brand for independent restaurants. The look and feel of their current website was meant to proclaim exactly what they were; "5 guys in North Carolina." With this laid-back appeal, Schedulefly promised to make life easier by enhancing communication amongst restaurant workers in a user-friendly web service.

As with other online scheduling services, Schedulefly functioned via cloud computing software. The schedule was created and monitored by the restaurant manager, who held the master account. Employees then registered under their employer, and created subordinate accounts, which they could log onto from anywhere they had internet access, including both computers and mobile devices. Once logged on, the

employees could check the schedule and make various requests, but only the master account holder was able to alter the set schedule (“We’re 5 Guys,” n.d.). The manager was therefore able to approve and keep records of shift changes, while at the same time monitoring overall labor efficiency.

Essentially, this program would allow employees to go online to check schedules, give notices for time off, request and accept shift changes, and record when these postings occurred. Additionally, Schedulefly would give the managers a composite understanding of labor costs based on the hours and wages of each employee scheduled.

Schedulefly’s pricing structure reflected the simplicity of the system itself. For restaurants with nineteen employees or fewer, the required payment was \$30 per month (“Pricing,” n.d.). With each increment of ten employees, the price increased an additional ten dollars. For restaurants with eighty or more employees, though, a price must be agreed upon via direct contact with Schedulefly programmers. Many restaurant owners and managers likely felt they saved the respective amount in the cost of scheduling issues that would have occurred without using the online system.

The attitude and appeal of Schedulefly went very much hand-in-hand with the ideals broadcasted by Mellow Mushroom. Both organizations had a mentality of easy-living and enjoyment through what they offered (see Exhibit 6: Schedulefly’s 10 Reasons to Use the Software). And while Mellow Mushroom might have been a fairly established corporation with locations in states all across the country, they encouraged independent decor at each location in order to set a unique mood in every restaurant. Thus, it was not surprising in the least that Mellow Mushroom utilized Schedulefly at numerous locations. Schedulefly’s anti-establishment attitude was undoubtedly a major attractor for a pizza company whose mascot was an inebriated cartoon mushroom.

The Schedulefly team was confident in their delivery of easier management, as they boasted a free first-month trial (“Pricing,” n.d.). They did not require contracts and encouraged feedback on how they could be of better service. Ultimately, they wanted customers to be pleased with their service, and they specialized in independent restaurants. While some Mellow Mushroom locations were more than happy to use Schedulefly services, the question remained as to whether the Tampa franchise owner or manager would feel the same way.

Making the Change

Staff Opinion about Paper versus Online Scheduling

There were several pros and cons of both paper and online scheduling so it was important to get feedback from the owner, manager and employees about what they thought of the two scheduling systems. In an interview with owner Greg, he said that he saw the potential benefits of using an online scheduling site. Greg himself was a server for many years, and always loved being a part of the restaurant industry. Consequently, he knew many issues that surrounded scheduling employees, so he was empathetic to the situation Mike and his staff were experiencing. Learning that Schedulefly was already being used by some Mellow Mushroom’s made Greg seem open to the idea of changing things, especially because the cost would be a nominal \$40 a month. The main concerns he expressed were making sure that every employee had access to the online schedule, and that implementing the change might be difficult since paper scheduling was the norm for the past nine years. Greg’s final comment on the matter was, “If online scheduling was what his employees wanted, then I have no problem with it. I don’t write the schedule, Mike (the manager) does.” So, Greg felt that he would not be directly affected by the change.

Lead manager Mike had some different opinions and concerns of his own. Mike had been in the restaurant industry for twenty years, and was used to dealing with employee complaints and requests.

Anything that made his job and the life of employees easier was an idea that needed to be considered. Throughout all his years in the restaurant industry and as manager in other restaurants, Mike had never used online scheduling before. He felt that it was something used by large scale companies with a substantial amount of employees, not by smaller companies that had less than thirty-five employees like Mellow Mushroom of Tampa. Nonetheless, Mike said that he would be open to trying a different way of scheduling if it would make things easier for the employees he managed. During the interview with Mike, he mentioned that an online scheduling site would make staff more accountable for their shifts because they could not use the excuse that they did not know when they worked. Also, the online site could track when shift swaps were occurring, so he would know what was going on, and have a say in who worked what shifts by approving or not approving shift changes. The concerns Mike had were: (1) making sure everyone had reliable internet access before considering such a change, and (2) asking employees how they felt about the possible changes. For Mike, the change in the scheduling process would be time consuming as he learned the online scheduling system, but it could provide him with better efficiency in the future by spending less time dealing with employee complaints and more time working on other tasks.

To determine how employees felt about online scheduling, they were given a survey that had space where they could anonymously indicate three positive and three negative outcomes of using an online scheduling system. The top answers for positive outcomes of using online scheduling software were easier access to the schedule (95.2%), an increase in communication between employees (61.9%), making people more accountable for their shifts (33.3%), and it being an environmentally friendly option (9.5%). Being able to view when others were working a shift from an employee's laptop or phone would make it easier to ask people to trade shifts and contact people. Then when shifts were traded, there would be an electronic trail of who was responsible for coming into work that night. The fact that employees gave these similar responses independently made it evident that they recognized benefits of using an online scheduling system over their current paper schedule.

Though they shared many of the same responses for positive outcomes, they also shared responses for negative outcomes of using online scheduling software. The most frequently written negative outcomes were possible internet issues, or someone not having internet (76.2%), glitches that may occur with the software (33.3%), waiting for managers to approve shifts (9.5%), and less likely to get overtime (4.8%) (see Exhibit 7 for employee opinion pie charts). At Mellow Mushroom of Tampa, one employee did not have internet access they could rely on, nor did they have a phone that had internet that they could depend upon. So in that case, they were hesitant about doing an online schedule, but noted that they could print it off the store's computer. Another concern for employees was glitches that may occur within the software. Having the schedule online meant that if they did not have it texted or emailed to their phone, employees would always have to have internet to access the schedule. And if the website ever malfunctioned, then it would be a hassle to figure out when they worked. Employees also did not like the idea of having to wait for a manager to approve shift swaps, when they usually just did it amongst themselves.

Implementation Issues

The reason for some massive failures in the implementation of technological solution adaptations were as varied as they were costly. Some of the most common causes of a technology implementation failure were: the failure to identify the complete needs of an organization, and the failure to select the appropriate program or technology. In Mike's case, these factors were more profound, as the small size of the franchise and the limited resources to implement a holistic ERP system severely deterred complete solutions. The difficulty often comes between what was promised, and what was delivered by the IT vendor--in this case, potentially Schedulefly.

Vendors would often promote the cost and time-saving benefits of their applications or products without fully explaining the total cost of the implementation of the solution. Mike also worried about hidden costs down the road that would severely reduce the utility of the scheduling application. Vendors often bid low initially to take advantage of change orders in the future to recoup funds. If implementation took longer than expected, or there were obstacles requiring changes, then the vendor benefit might be reduced as a result of increased costs due to accommodating those changes. Mike was also concerned about his staff's ability to accept and embody the change due to their inexperience with these types of systems.

Some organizations would spend years implementing new applications and procedures only to find they did not solve the initial problems without creating new obstacles; or they find that their personnel were not willing to use the new system. Training and buy-in were vital to successful implementation of new technology and processes. Despite being essential to the successful adaptation, appropriate and adequate training was often neglected in the budgeting process. Mike had no way to verify that Schedulefly would fix the scheduling issues at the restaurant, but keeping some of the implementing challenges in mind might help to overcome potential obstacles.

In a survey of 163 different companies conducted by *Pmsolutions*, 92 percent of companies surveyed felt that a project manager's skills were the key to the success of a project (Project Management Solutions, 2011). Mike had a lot of experience in the restaurant industry as a manager, but he had no IT personnel and no project managers to facilitate the change. Mike would have to be the face of the change, and be knowledgeable and open enough with employees for the switch to an online scheduling system to be possible.

One fear was that a failed implementation might create a culture of resistance to future attempts to adopt technology. However, not adopting may have put Mellow Mushroom at a disadvantage when trying to retain talented employees. One factor was amazingly clear, if the Tampa Mellow Mushroom was going to implement Schedulefly, it would need the management and owners' full support. A lack of owner or management support was by far the most significant obstacle to any technology implementation. Not unlike Mellow Mushroom, often the end users who would benefit the most from technology implementation, were the ones to bring the new process or software to the attention of the owners or management. Without management's authority to implement, and support throughout the process, a technology implementation would be more likely to fail. Mike and Greg needed to be willing to devote resources and most critically, time and funding to implement the new technology.

Overcoming Obstacles

On the other side was the dedication and enthusiasm of the end users, in this case the employees. These employees could also have an overwhelming impact on the success or failure of the implementation. The users must put forth the time and effort to make the new system work for them. If the staff felt that a digitized schedule would make it easier for Mike to manage hours to avoid paying overtime, then they might have rejected the new system and preferred the old paper schedule. Conversely, if they felt the online schedule would promote communication, and make their schedules easier to access, then they would be on board for the change.

Additionally, if Mike was going to seriously consider this cloud based scheduling, he would need to reach out to others who had used Schedulefly, and find out how their implementation had gone. If making the changes worked well and solved problems for other stores, then Schedulefly might also work for the Tampa location. Likewise, if there were difficulties in implementation at other stores, then Mike could learn from other franchisee's experiences before starting the process with his employees.

Conducting thorough rehearsals and walkthroughs of potential changes was one way Mike could mitigate the possible pitfalls of implementing Schedulefly. Often vendors of labor management systems would minimize the importance of training in the adoption of their technology. These training sessions should often be comprised of rehearsals led by management parties to walk through different scenarios that might arise during implementation. By conducting rehearsals prior to implementation, many of the perceived drawbacks could be overcome, and potential obstacles could be identified and mitigated.

If Mike decided to adopt Schedulefly, then the paper system must be dropped immediately after the training sessions to prevent employees from reverting to their old habits of dropping and picking up shifts on the paper schedule. This would aid in compliance and adoption of the new system by having no competing system to the new online schedule. The paper copy could be left up until the training was completed with all employees, but then must be immediately removed leaving no alternative ways of accessing the information other than the Schedulefly site (see Exhibit 8 for image of Schedulefly homepage).

The Decision

While pondering about the scheduling issues, Mike realized there was more to his decision than just a yes or no to using online scheduling software. Mike must keep in mind employee opinions about the matter and the cost to the business—not only the scheduling system, but also the time and resources put into implementing the change. Before deciding, Mike needed to consider how much the staff valued the change and whether they were willing to work together to make the cloud based scheduling system change happen. If not, then the paper schedule should stay because it had been used for the past nine years.

Schedulefly claimed to have revolutionized the employee scheduling process. It was marketed as the next generation of employee scheduling, enabling companies to forecast labor costs and apply simple updates to employee schedules. As Mike looked out over the Saturday night crowd at Mellow Mushroom of Tampa, he needed to decide—stay grounded or Schedulefly?

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Exhibit 1: Technology Trends

TECHNOLOGY TRENDS							
Smart(phone) Restaurant Activities							
Consumers who say they would be likely to use a smartphone or tablet for restaurant-related activities							
	All adults	Age 18-34	Age 35-44	Age 45-54	Age 55-64	Age 65+	Children under 18 in household
Look up locations or directions	67%	88%	78%	63%	60%	31%	80%
Order takeout or delivery	52%	74%	62%	45%	39%	20%	67%
Use rewards or special deals	50%	70%	58%	47%	38%	21%	65%
Make a reservation	46%	59%	60%	38%	40%	22%	56%
Look up nutrition information	42%	55%	46%	38%	35%	23%	54%
Pay for your meal	24%	43%	22%	16%	16%	9%	32%
Source: National Restaurant Association, Technology Innovations Consumer Survey, 2013							

Source: Executive summary: 2014 Restaurant industry forecast. (2014). Retrieved from <http://www.restaurant.org/Downloads/PDFs/News-Research/research/2014Forecast-ExecSummary.pdf>

Exhibit 2: Restaurants Investing in Technology

Restaurants Are Investing in Technology

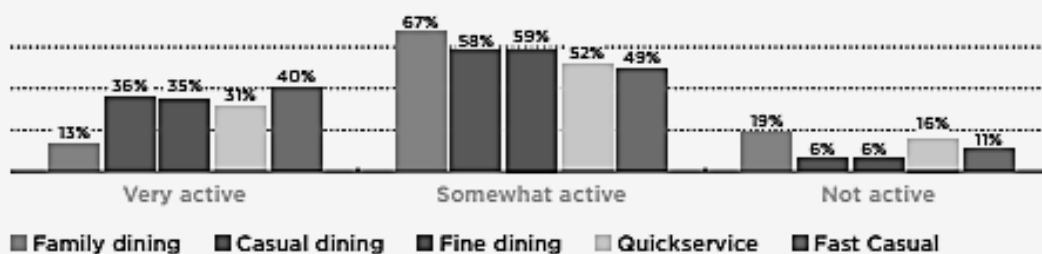
Restaurant operators who say they will devote more resources to technology in 2014

	Family dining	Casual dining	Fine dining	Quick-service	Fast casual
Customer-facing technology	41%	50%	51%	43%	57%
Front-of-the-house technology	28%	35%	23%	39%	47%
Back-of-the-house technology	24%	30%	19%	33%	38%

Source: National Restaurant Association, *Restaurant Trends Survey*, 2013

Restaurants are Socially Active

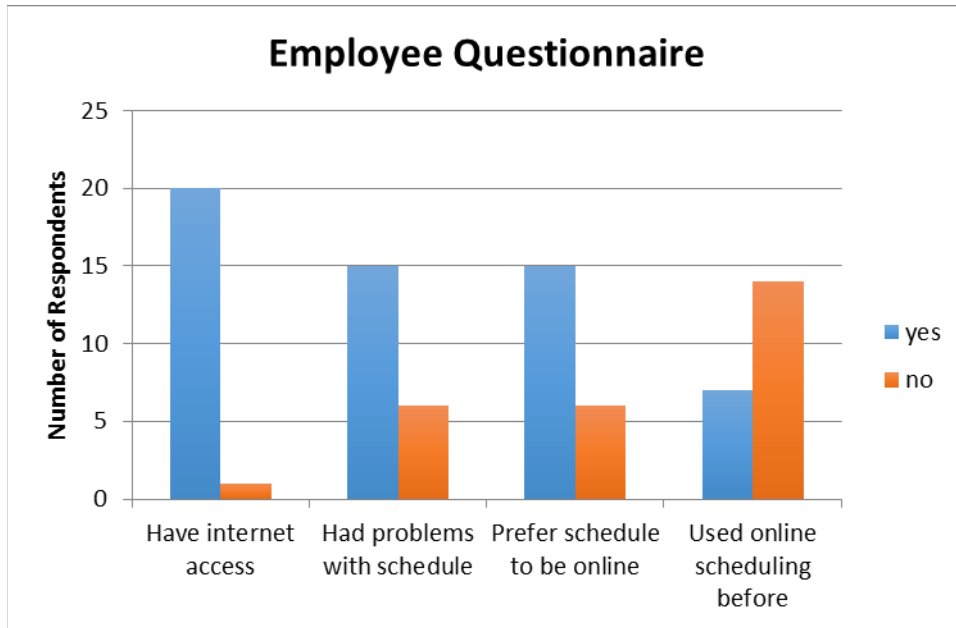
Percentage of restaurant operators who are currently active on social media



Source: National Restaurant Association, *Restaurant Trends Survey*, 2013

Source: Executive summary: 2014 Restaurant industry forecast. (2014). Retrieved from <http://www.restaurant.org/Downloads/PDFs/News-Research/research/2014Forecast-ExecSummary.pdf>

Exhibit 3: Employee Questionnaire Answers



Source: Survey conducted by Lauren Craton. All participants answered anonymously. Total survey size was twenty-two participants who were currently working at Mellow Mushroom Tampa, which was roughly 75% of all employees working at that specific location.

Exhibit 4: Sample Mellow Mushroom Tampa Employee Schedule

Will work 34-41%

	15-Sep	16-Sep	17-Sep	18-Sep	19-Sep	20-Sep	21-Sep
	MON	TUES	WED	THURS	FRI	SAT	SUN
SERVER							
[REDACTED]	3BD	5:30CL	10AM	5CL	3BD	10AM	R
[REDACTED]	x	x	x	x	BAR	BAR	BAR
[REDACTED]	x	5:30CL	BAR	BAR	3BD		10AM 12PM
[REDACTED]	5CL	4BD	10AM		4BD	5CL	4CL
[REDACTED]	10AM	x	x	10AM	x	12AM	3BD/Bar
[REDACTED]	R	BAR	BAR		BAR	BAR	10AM
[REDACTED]	5CL	x	5CL	x	5CL	4BD 10PM	3BD
[REDACTED]	x	10AM	OFF	3BD	10AM	5CL	12BD
[REDACTED]	10AM	3BD	x	10AM	5CL	3BD	12AM 10AM
[REDACTED]	x	x	x	R	12BD/P	4BD	x
[REDACTED]	10AM	10AM	5CL	4BD		4BD	BAR
[REDACTED]	BAR	R	x	x	R	x	x
[REDACTED]	x	x	4BD	BAR	x	x	4CL
[REDACTED]	R		3BD		4BD	3BD	R
[REDACTED]	4BD	BUS	TG	TG	10AM	R	
[REDACTED]	TG	TG		5CL	TG	12BD/P	
BAR							
[REDACTED]	4CL	R	x	x	R	x	4CL
[REDACTED]	x	x	x	x	10:30BD	4CL	10:30AM
[REDACTED]	R	4CL	10:30AM		4CL	10:30BD	10:30am
[REDACTED]	10:30AM	10:30AM		4CL	x		x
[REDACTED]	x	x	FLR	4CL			
[REDACTED]			4CL	10:30AM			
HOST							
[REDACTED]	5TG	5TG		FLR	5TG	FLR	
[REDACTED]	R		FLR		FLR	FLR	FLR
[REDACTED]	FLR	BUS	5TG	5TG	FLR	R	R
[REDACTED]	x	x	5HOST	x	5CL	5TG	4TG
[REDACTED]	x	x		5HOST	12AM	4CL	12AM
[REDACTED]					4BD	x	
[REDACTED]	5HOST	5HOST	x			12BD	4CL
BUS							
[REDACTED]		6CL			6CL	5CL	5CL
[REDACTED]							
BBCK							
[REDACTED]					5CL	5CL	
[REDACTED]							
[REDACTED]							
* NOTE: THE REQUEST OFF BOOK ALL SHIFT CHANGES MUST BE APPROVED BY MANAGER							

Will pick up Tuesday night!

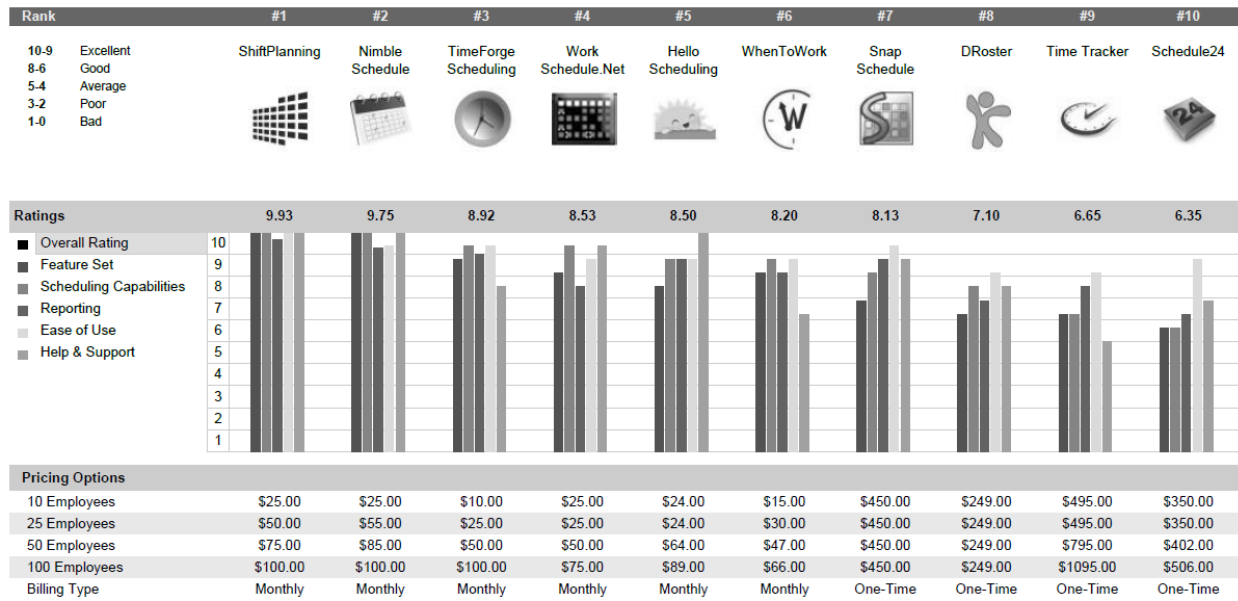
Will pick up Wednesday in Friday Night!!

Will pick up Saturday!

Source: Mellow Mushroom Tampa wall where actual paper schedules were posted.

Exhibit 5: 2014 Best Employee Scheduling Software

2014 Best Employee Scheduling Software Comparisons



Source: NimbleSchedule. (n.d.). Retrieved from

<http://employee-scheduling-software-review.toptenreviews.com/nimbleschedule-review.html>

Exhibit 6: Schedulefly's 10 Reasons to Use the Software

Ten reasons your life will be easier...

Set Yourself Free

Create staff schedules from anywhere.
Deliver to everyone with a touch (or click).

No. More. Calls!

Your team checks their schedule from
their phone, tablet or laptop.

Bye Bye Scrap Paper

Time off requests and shift trade requests
happen here. Really, no calls or paper.

Connectedness

Everybody loves the Message Wall.
Think "Facebook for work".

Planning Is A Cinch

It couldn't be easier to forecast labor costs.
We tally up the dollars as you go.

Burn Your Paper Logbook

Fly Notes keeps managers in synch.
Assign ToDos, set reminders.

Get Organized In The Cloud

Store your restaurant's documents with us.
You won't lose them and you'll print less.

Hiring Just Got Simple

The Job Post tool is so simple you'll laugh.
Never lose another resume.

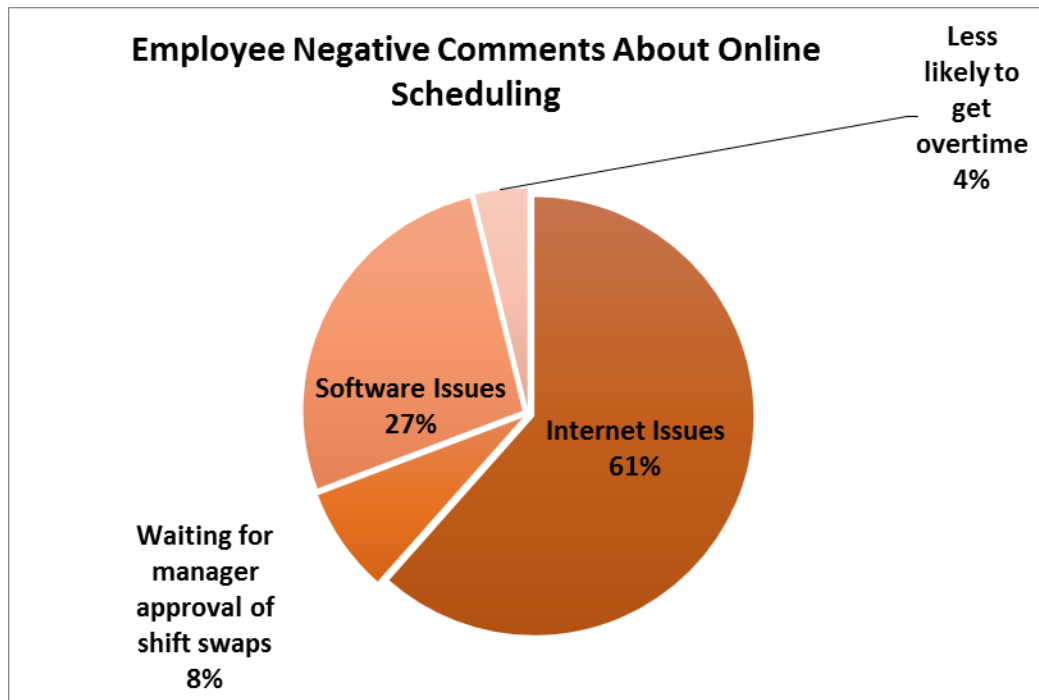
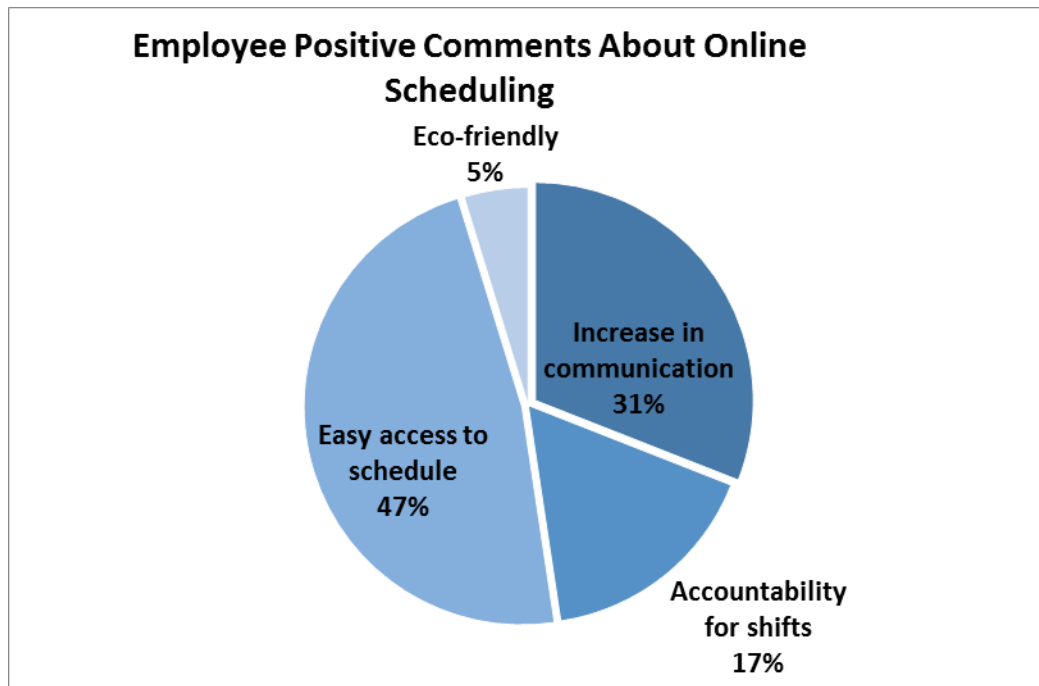
Connect On The Fly

Our mobile web site is scary good.
One app works on all devices.

Be Prepared For The Day

Your daily crib sheet and any reminders
you've scheduled arrive via email each day.

Source: Schedule Fly, Inc. (2014). Retrieved from
<http://www.schedulefly.com/employee-software.htm>

Exhibit 7: Employee Opinion Pie Chart (Percent of Respondents)

Source: Pie chart created from survey conducted by Lauren Craton. All participants answered anonymously. Total survey size was twenty-two participants who were currently working at Mellow Mushroom Tampa, which was roughly 75% of all employees working at that specific location.

Exhibit 8: Schedulefly Website Homepage 10/5/2014

Schedulefly is a web-based restaurant staff scheduling and communication software



[Free Trial](#) [Learn More](#) [Pricing](#) [Our Story](#) [Blog](#) [Sign In](#)

Life is Easier at Over
4,400 Restaurants with Schedulefly.

We help awesome people like these feel more organized,
in sync and connected with their restaurants...

They work at great places like these...



Source: Schedule Fly, Inc. (2014). Retrieved from
<http://www.schedulefly.com/employee-software.htm>