



**NUCLEUS
RESEARCH**

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WFM TECHNOLOGY VALUE MATRIX™ 2025

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THE BOTTOM LINE

Effective workforce management operations cannot be sustained with a “set and forget” approach. Instead, the dynamic nature of frontline organizations and their challenges require constant innovation, making the market for WFM solutions increasingly competitive. In addition to adding more industry-specific capabilities and solutions, vendors have continued to refine their offerings on several fronts. For example, compliance management updates continue to be a crucial point of investment to ensure that customers can confidently meet changes in regulatory environments. Employee experience has also come to the forefront of expectations, with features that give workers more control over schedules and engagement tools to lower traditionally high attrition rates among frontline industries. Additionally, while AI and machine learning have long been staples of labor demand forecasting, several vendors have invested in Generative AI, offering assistants that can answer employee inquiries and provide managers with actionable recommendations to accelerate and improve decision-making.



MARKET OVERVIEW

For frontline organizations, effective workforce management (WFM) is always a moving target. Considering fluctuations in labor budgets, regulations, and employee expectations, advanced capabilities and solutions for WFM have become increasingly crucial for driving both top and bottom-line results.

s more organizations seek to optimize their workforce management operations and avoid costs of unplanned overtime and attrition, the market for WFM software has become more competitive than ever before. To better meet the nuanced requirements across frontline industries, many vendors have put more emphasis on pre-configured, industry-specific capabilities to drive accelerated time-to-value and improved ROI outcomes for customers across sectors such as retail, healthcare, hospitality, and manufacturing.

Adoption is a make-or-break component of any technology deployment. However, the unique nature of frontline organizations leaves little time for formal training and requires consumer-grade mobile applications. Recognizing this, many vendors have made improvements to the user experience of their mobile applications, ensuring that managers and employees can quickly and effectively complete self-service tasks. Vendors have also continued to add elements of employee engagement, such as communications and the ability to set shift preferences, to combat traditionally high attrition rates among frontline-heavy industries. Cross-locational scheduling has also been a more significant point of focus as organizations seek to maintain efficiency amid labor shortages.

AI and machine learning have long been present in forecasting and scheduling capabilities across vendor offerings. However, many have invested in the next frontier of AI innovation in WFM. This includes Generative AI assistants to answer employee inquiries and AI-powered insights in analytics tools that deliver actionable nudges to help managers and other frontline leaders make quick, informed decisions. As always, the dynamic compliance landscape requires constant attention to regulatory changes, prompting enhancements to compliance management capabilities and increased integrations and partnerships with HR, payroll, and other enterprise systems to create unified systems of record.

For this year's Value Matrix, Nucleus evaluated WFM providers based on the relative functionality and usability of their solutions to assess the value that can be achieved through the use of the product's capabilities (X222 – Understanding the Value Matrix – December 2023). The report is intended to serve as a snapshot of the WFM technology market, highlighting the specific ways in which vendors are delivering value to customers and taking stock of what can be expected in the future based on current investments.

ZEBRA TECHNOLOGIES

Zebra's Workcloud software solutions optimize critical resources: employee time and activities, inventory, and budgets. These solutions are designed to improve task management, labor scheduling, communication, inventory management & visibility, and loss prevention. Workcloud enhances the daily operations and assorted functions of the frontline. With the added benefit of interoperability with Zebra mobile computers, Workcloud solutions boost productivity while enabling frontline employees to focus on their customers.

The vendor's offerings are best suited to the needs of organizations with large workforces and otherwise complex WFM requirements. Zebra offers industry-specific solutions for customers in retail, banking, healthcare, manufacturing, and hospitality, with more than 20 years of expertise in serving retail and banking organizations. Workcloud software solutions have built-in compliance, enabling organizations to navigate regulations at the federal, state, and local levels.

The Workcloud Workforce Optimization Suite includes functionality for scheduling, time and attendance, employee self-service, task management, compliance, and labor optimization, all underpinned by reporting, analytics, and mobility. Zebra's employee self-service functionality in Workcloud Shift enables employees to take a greater degree of control over their own schedules, leading to improved engagement and reduced attrition. AI-powered forecasting aligns scheduling to business needs to optimize labor investments and deliver a better customer experience. The vendor's forecast modeling functionality provides customers with more than a dozen forecasting models that use machine learning and AI to optimize labor planning and spend quickly and efficiently. Managers can generate schedules that align with their specific staffing goals, including the ability to align staffing with factors such as customer demand. Schedule generation also automatically factors in employee considerations and preferences, ensuring that their needs are accommodated. The vendor also offers multi-store scheduling, providing customers with the ability to schedule shifts across multiple locations and schedule cost calculation options using its Timekeeping pay engine.

- ▶ **New ESS UX**

- The Workcloud Shift employee self-service app has an overhauled UX design that dynamically fits any device or screen size with ADA compliance.

- ▶ **High Volume Data Hub**

- Zebra's High Volume Data Hub connects solution data to a customer's data warehouse enabling modernized, performant data extracts. This enables ETL pipeline setup and BigQuery APIs to support end-to-end processes.

▶ **Strategy Partnership**

The vendor has partnered with Strategy to deliver Next-Gen Workcloud BI, a modern, configurable reporting solution for frontline organizations.

▶ **Additional Enhancements**

Zebra has made several enhancements across capabilities including annual labor forecasting, workload rounding, role delegation, schedule calendar view, and day-level shift templates.