Statement

Fair Work Commission

Justin Gusset

Applicant

Apple Pty Limited

Employer

Statement of: Kyle Manis

Address: c/o Level 3/20 Martin Place Sydney NSW 2000

Occupation: Project Manager – Retail Operations

Date: 7 June 2023

I, Kyle Manis, say:

1.   I am employed by Apple Retail UK Limited, and previously Apple South Asia Pte Ltd, in the position of Project Manager and commenced in this position in January 2019. I have previously worked for Apple in store leadership positions and have worked at Apple for almost 11 years.

2.   In my position, I am responsible for the design, management, and execution of key projects and initiatives relating to scheduling, staffing strategies, and solving complex technical problems that relate to resource planning tools and technology for Apple retail. This includes:

    (a) to create, manage, and execute detailed project plans, key documentation, process maps, and schedules, with responsibility for task and team coordination;

    (b) to track project and deliverables, regularly coordinate and escalate high priority issues communicating status to global teams;

    (c) to develop and maintain key partnership with the field including Regional Directors, Market Leaders, Store Leaders, and store teams sharing key projects and initiatives by traveling to markets, hosting forums, conducting calls, and creating a feedback and communication outlet;

Filed on behalf of	Apple Pty Limited
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(d) to work closely with the Employee Relations and People teams to ensure that all Resource Planning programs land successfully with relevant approvals;

(e) to work closely with and maintain key partnerships with the Systems and Technology teams to identify and resolve systematic issues that may negatively impact Apple Retail Stores; and

(f) partner with peers and the field to maintain awareness of global initiatives, compliance, systems, technology, and current day climate within stores.

The People Planning Operations team at Apple

3. Apple calls rostering employees into shifts "*scheduling*". I use "*rosters*" and "*schedules*" interchangeably in this statement.

4. Scheduling for Apple's 22 retail stores throughout Australia is completed by a centralised scheduling team, the People Planning Operations (**PPO**) team.

5. There are currently around 560 number of employees in the PPO team globally, and around 25 in Australia. Almost all of the PPO team have previously worked in an Apple retail store before taking up a position in the PPO team.

6. Prior to August 2021, Apple retail stores planned and processed their own schedules for their local workforces. However, a decision was taken by Apple to centralise this process with the PPO team holding this function for the global retail business.

7. The decision to centralise the scheduling processes was taken by Apple because it would improve its operations, deepen expertise in human resources planning and workforce management, and has resulted in is a generally consistent approach across the Apple retail business globally.

8. When scheduling was carried out by each individual store, there were a number of organisational risks and issues which are eliminated by centralised PPO. There was only one person responsible for scheduling in a store and this was sometimes carried out the by the Store Leader. This meant that each store had its own scheduling practices and so the business was inconsistent in its rostering from store to store. This made it very difficult for the person responsible for scheduling to take leave and, if an error occurred, because the person was solitary this created a single point of failure in the system.

9. Because Apple stores have different departments, varying skills, qualifications and experience including repair work and have a large number of employees being scheduled weekly in each store (generally over 100), Apple's scheduling system is seen within Apple as an integral part of its operations and that there are no viable alternates to scheduling for Apple.

WorkJam and retail employees

10. On commencement, employees inform Apple of their availability into an application "WorkJam".

11. WorkJam is not exclusive to Apple and is not developed by Apple.

12. It is a communication and rostering platform that allows employees, their managers and colleagues to review schedules, manage shifts trades and communication between store leadership and co-workers about shifts.

13. I am aware from my employment that Apple retail employee receive specific training about WorkJam during their onboarding process. In addition to onboarding training, the following resources are available to all Apple employees:

    (a) an overview of the WorkJam application, which is annexed and marked "**KM-1**"; and

    (b) a guide on how employees submit availability into WorkJam, which is annexed and marked "**KM-2**".

14. An employee's availability means what days they choose to work in a week-long period from Saturday to the following Friday.

15. Employees can choose to be available on each day in the week. Employees can also select days that they are unavailable. For example, a full-time employee can select one weekday that they are unavailable, or a part-time employee can select one or two weekdays that they are unavailable. The number of days that an employee is unavailable will typically follow this pattern, although employees can be unavailable on a higher number of days including weekends through partnering with their manager to request this availability. This availability would require the specific approval of the employee's manager but is possible from a systems perspective.

16. If an employee is unavailable, Apple will never schedule the employee to work during those days or hours. These days are "*blacked out*" and the system, which I describe below, will not give an employee a shift on a day that they are not available to work.

17. Employees can update their availability in WorkJam as they wish during their employment. Once submitted, the request would route to the employee's store leadership team for review in WorkJam. The store leadership team can either approve the request or return to the initiator if is not approved or deny the request, all in the WorkJam application. The date from updated availability takes effect will depend on when in the scheduling cycle they submit it and when it is approved. It may take 2 or more weeks for an employee's new standing availability to come into effect once approved and forms a repeating pattern in the system for that employee.

18. Annexed and marked "**KM-3**" is a screenshot from Apple's People site that describes how managers in retail stores respond to availability updates from employees in WorkJam. This resource is accessible to all Apple store management globally.

19. Once an employee's availability is entered into the system on commencement, and as approved by the store leadership if updated after commencement, this availability becomes the weekly basis for scheduling the employee to work as described below.

20. Within the employee's availability, the employee is then required by the WorkJam application to express shift preferences by the employee selecting one of two types:

    (a) "*preferred shifts*", which allows the employee to select the preferred hours of work within each day or period of availability; and

    (b) "*preferred days off*", which allows the employee to select up to two preferred weekdays off, and the hours they prefer to work on weekend days.

21. An employee's "*preferred shifts*" are clear days that the employee is likely to be scheduled within.

22. An employee does not need to select "*preferred days off*". If unavailable days are "*blacked out*" and "*preferred shifts*" are clear days, then "*preferred days off*" are the "*grey*" hours of work that an employee would prefer not to work but is available to work.

23. To give a hypothetical example of how this works, a part-time employee:

    (a) must indicate they are not available to work on Tuesdays or Thursdays, because the employee has personal activities or commitments that are the same each week on these days; and

    (b) can indicate that their "*preferred shifts*" are Friday to Monday; or

    (c) can indicate that their "*preferred day off*" is the Wednesday, so that they do not work for three consecutive days. However, they are available to work Wednesdays and so it is possible for the employee to be scheduled on Wednesdays.

24. In this example, "*preferred shifts*" and "*preferred day off*" are two options and an employee can select one of those two options in WorkJam as their preference option.

25. Employee can set chose to have each day in the week as an available day and the default in WorkJam is for a day to have "*all day*" availability, meaning that the employee is available for an entire 24 hour period. Even when an employee sets all day availability, the hours that a shift could be scheduled to cover is dictated by the store's opening hours as well as their job tasks required within or close to those opening hours.

Scheduling principles for Apple retail

26. Apple's scheduling goal is to match staffing levels to customer traffic.

27. The overarching aim is to provide consistent service levels, which is intended to improve both the Apple team's experience and customer experience.

28. Scheduling employee shift times and shift length depends on forecast customer traffic in each area or zone that the employee works in. As a retail business, weekends and evenings are Apple's busiest time with the majority of customer traffic and demand occurring at these times.

29. Apple retail stores contain different "*departments*", being specific areas where different tasks, work and sales are carried out. The different departments are the Product Zone, Genius Bar and Forum, Operations and Management.

30. The types of work, known as the "*job tasks*", and departments that an Apple retail employee works in is limited by the position the person is employed to work in (for example, a Specialist) or the job family that has related or similar job tasks that can also be carried out by that position (for example, a Specialist can readily perform 'on point' work, which is greeting customers on entrance to the store).

31. One department in an Apple retail store is the Product Zone where customers will enter the store and generally browse and purchase products and is largely staffed by Specialists. Specialists are customer service and sales employees. The Product Zone relies on traffic-based forecasting, referrable to the volume of foot-traffic into an Apple store by customers or potential customers who require assistance from a team member to learn about and purchase products on sale at Apple.

32. Another department is the Genius Bar, where primarily repair work is carried out by Geniuses. This department is different to the Product Zone because it relies on bookings made by an appointment-based system, which is integrated into scheduling systems. Unlike the Product Zone, for instance, scheduling for the Genius Bar is informed by demand for appointments instead of general customer traffic to a store.

33. In both instances, staffing levels are a significant driver that enable acceptable wait times for Apple's customers. Acceptable wait times is treated by Apple as the starting point for a good customer experience and is critical to Apple's retail business model.

34. As I referred to above, an employee's job tasks operate as an anchor point for employees' physical location within the store, and the work they are performing. This then informs how an employee is scheduled and what additional shifts may be taken up by an employee who is looked for additional shifts outside of their scheduled shifts.

Creating a schedule

35.   A schedule that matches customer demand as projected for the roster period is created in the following way. A roster period is one week long.

36.   Firstly, the system accounts for employee availability. Apple's employee availability is the first and most important input for scheduling, as this provides the time frames for how employees are rostered to work.

37.   Secondly, any leave that has been requested by team members which has been approved by leaders in the employee's store is accounted for. Generally, leave must be submitted and approved 5 weeks before a schedule for that week is being created to be taken into account. This includes paid leave, like annual lave, as well as unpaid leave, which is known as "*requested time off*" or an RTO. Paid leave is limited by the employee's accrual of that leave from time to time, whereas RTOs are not limited.

38.   This does not preclude leave from being accessed by employees after this time, but it will not be accounted for in creating the schedule.

39.   Then, store leadership and the PPO team will meet on a weekly basis to discuss any particular planning requirements for the store at their local level. For example, there may be particular training for employees in a particular week that must be added into the schedule for each employee or the store leader may seek a store meeting, or know of team meetings within a department. Some of these requests are submitted or referred to the PPO team throughout the week and the meeting serves as a confirmation of the information provided by the store leadership to the PPO team.

40.   The PPO team create a scheduling plan for that week. This scheduling plan is maintained by PPO, but is a collaborative document informed by store leadership and contains the specific details and requirements for scheduling the store.

41.   The scheduling plan is then paired with a budget for staff hours based on different job tasks for the week. Apple's finance team provides an allocated of budgeted payroll. This budget does not identify any particular employee in the store and takes an average hourly rate of pay for each position within a department that would perform the job tasks to create an overall store budget for that week.

42.   Scheduling is done for particular stores. This means that employees are connected to one retail location only. There may be rare situations, based on a temporary need in another store, where employees will be scheduled to work other than their home location for a few shifts or for a month of two. However, all scheduling including scheduling adjustments I describe in this statement refer to the one store for each employee only.

43. This data is then put into Apple's forecasting system, which is called the Hourly Investment Engine (or **HIE**), by the PPO team.

44. HIE then automatically combines the hours budgeted to specific job tasks with the demand indicators previously described for each job task and department within the store. This produces the target scheduling coverage needed for each job task for every 15 minute increment within a specific roster week that is being created. For example, target scheduling covering to take Mac reservations at a store's Genius Bar (being a job task) requires 2 team members on Tuesday from 10 am to 10.15 am.

45. Apple uses a software program known as UKG Workforce Central (previously known as Kronos) that combines this forecast data (which is the target scheduling coverage needed for each job task I described above), individual employee attributes (being availability, approved leave, job position, status, store) and compliance rules for scheduling (such as break requirements, shift length, hours, days, time between shifts) to create the baseline set of shifts for each employee for the given week.

46. PPO then adjust the details of these shifts to include detailed activities agreed upon with the store to finalise the schedule details. For example, a department meeting.

47. A schedule is published 2 weeks before it commences, so the employee can see 3 weeks of shifts at any time (being the current week and 2 future weeks as rostered).

The WorkJam application and adjustments to the schedule after publication

48. Once schedules are published to team members, they become visible in WorkJam. This process is automated and so will always happen at 12.01 am on Saturday.

49. After publication, there may be adjustments to the schedule.

50. Employees may choose to make the following shift changes through WorkJam:

(a) "*shift swap*", which means where two employees seek to work a different shift and trade their assigned shifts with each other;

(b) "*shift release*", which means where an employee elects not to work a shift they were available and scheduled to work and offer it to another employee (the **second employee**) to work, which then transfers the shift to a teammate with the second employee's consent and approval. This means that the second employee has an additional shift, but the employee who was originally scheduled to work has lost this shift (because they have given it away). The employee does not need to find the second employee before they can release it but, unless a second employee takes up the shift, the employee will still have this shift in their schedule; and

(c) "*pick up shift*", which means where a part-time employee can opt to pick up additional shifts visible to the employee in WorkJam. This shift is not one allocated to another employee when it is picked up but is an additional shift created by a Manager or PPO, for whatever reason.

51.   Managers, leads and a People Operations Planner in PPO can submit requests by way of a ticket system to adjust published schedules more than 7 days into the future. The PPO team receives these tickets, or requests, from stores and aims to resolve each request within 24 hours.

52.   Within the current rolling 7 day period, managers and leads in store can make direct schedule adjustments using a separate application used by managers called Schedule Manager. Schedule Manager is a tool developed by Apple specifically for store operational needs. When a manager or lead makes any schedule adjustments in Schedule Manager, because of the integration of this application with WorkJam, the adjustments are visible to employees in WorkJam almost instantly because of the automated integration of the two systems. When I say a "*rolling 7 day period*", by way of example, I mean within the week from Wednesday before the following Tuesday.

53.   Apple does not make adjustments to the schedule after it is published to adds shifts to an employee's schedule. Although employees can select additional hours of work, it is their choice to do so in accordance with the above processes. Apple does not direct or require additional shifts to be carried out; if a particular need arises to ensure coverage in an area because, for instance, an employee is unwell or because of a new product launch, then this may give rise to a local level and ad hoc request. If this was the case, managers would consult with employees about their interest and preferences for any additional shifts and take this into account before changing a published schedule. Other than those rare instances, from a scheduling perspective, Apple does not add extra shifts to employee's rosters after they are published.

Employee choice to adjust the schedule

54.   After the schedule has been published, employees can swap shifts, release shifts, and pick up shifts when eligible. I have set out this process above.

55.   The timing, and scope, of the schedule change impacts on whether a shift swap is approved automatically, requires review or is automatically denied. This is because there are a number of compliance rules that prevent some adjustments being automatically approved by WorkJam.

56.   Up to weekly caps, part-time employees can proactively or reactively pick up shifts that align with their role in-store. Part-time employees can use WorkJam to accept additional

hours, even in circumstances where this shift is outside of their availability and shift preferences in WorkJam, if they desire.

57.   If an employee requires a scheduling adjustment and cannot find a shift swap, or a second employee does not elect to pick up a shift that the employee has released, the process for the employee to follow to obtain the scheduling adjustment is to speak with their manager to discuss what the adjustment they would like and see if a schedule adjustment to their schedule is possible. The manager would assess the impact of the employee's request in conjunction with staffing levels for the day and any potential customer impact to determine whether to approve or deny the adjustment request.

58.   Where a scheduling adjustment removes an employee from a shift (because of an employee request, or a leave type), that shift is transferred to the "*open shift pool*". This shift is automatically visible to other employees in WorkJam if those employees work in the same position required by the shift.
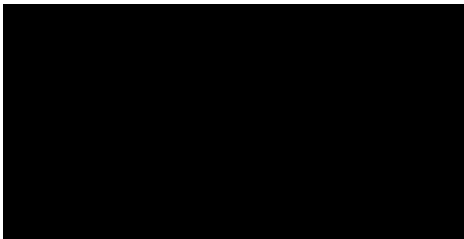
June 7, 2023

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Signature of witness

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People How-To > Timecard and Scheduling > WorkJam Overview

WorkJam Overview

Learn how to navigate WorkJam.

Getting started

Sign in to WorkJam. (Views may vary slightly by group.)

Getting started on iOS ⌄
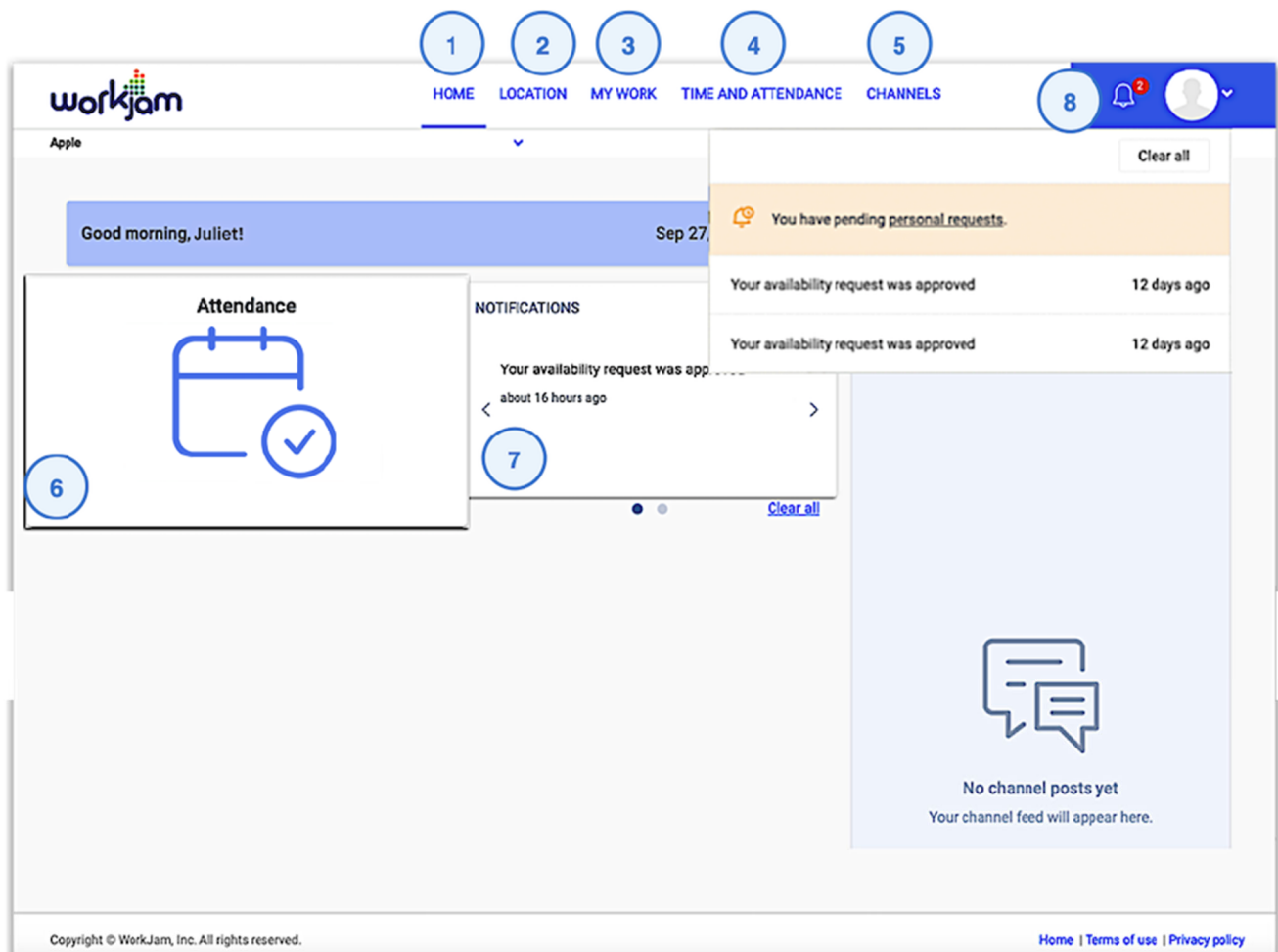
① **Home**
This page displays your work location and the dashboard.

② **Location**
View the status of your current availability and historical timecard requests in **My active requests**.

See all previous requests in **My archived requests**, in addition to a record of your timecard edits (for editable-timecard users only).

③ **My Work**
Select "Schedule" to see an overview of the schedule segments in place and availability.

Some groups may see:

- Training
- Surveys
- The open shift pool

④ **Time and Attendance**
View your complete timecard details for current and past pay periods.

⑤ **Channels**
Find internal announcements (for AppleCare and Retail only).

⑥ **Attendance Dashboard card**
This displays **Attendance** (for AppleCare and Retail only).

⑦ **Notification Dashboard card**
View the status of availability requests and timecard edits.

⑧ **Notifications**
After you click the icon, "notification status" appears. Click "personal requests" to view the request.

Was this page helpful?   Yes   No   2 people found this page helpful.
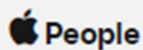
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The People site is intended to provide key business and benefits information relevant to you. You are also welcome to read the detailed legal plan documents, contracts, and policies that govern your benefits. In case of any conflict between the People site content and the official plan documents, contracts, or policies, the latter will govern.

For instructions on how to get these documents, contact People Support.

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Apple Benefits Portal	REST	People Support	Careers at Apple
Employment Verification	Cigna Global	Global Security	Apple Travel
Time Away Request	International SOS	How-To Library	IS&T
	E*TRADE	Apple Start	
		Apple University	

Discounts	Connection
Product Savings	Accessibility
The Source	Inclusion & Diversity
QPromo	Employee Giving Portal
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Request Availability in WorkJam

Learn how to create new availability requests in WorkJam.

Getting started

Sign in to WorkJam.

Getting started on IOS ⌄

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1   View your schedule.
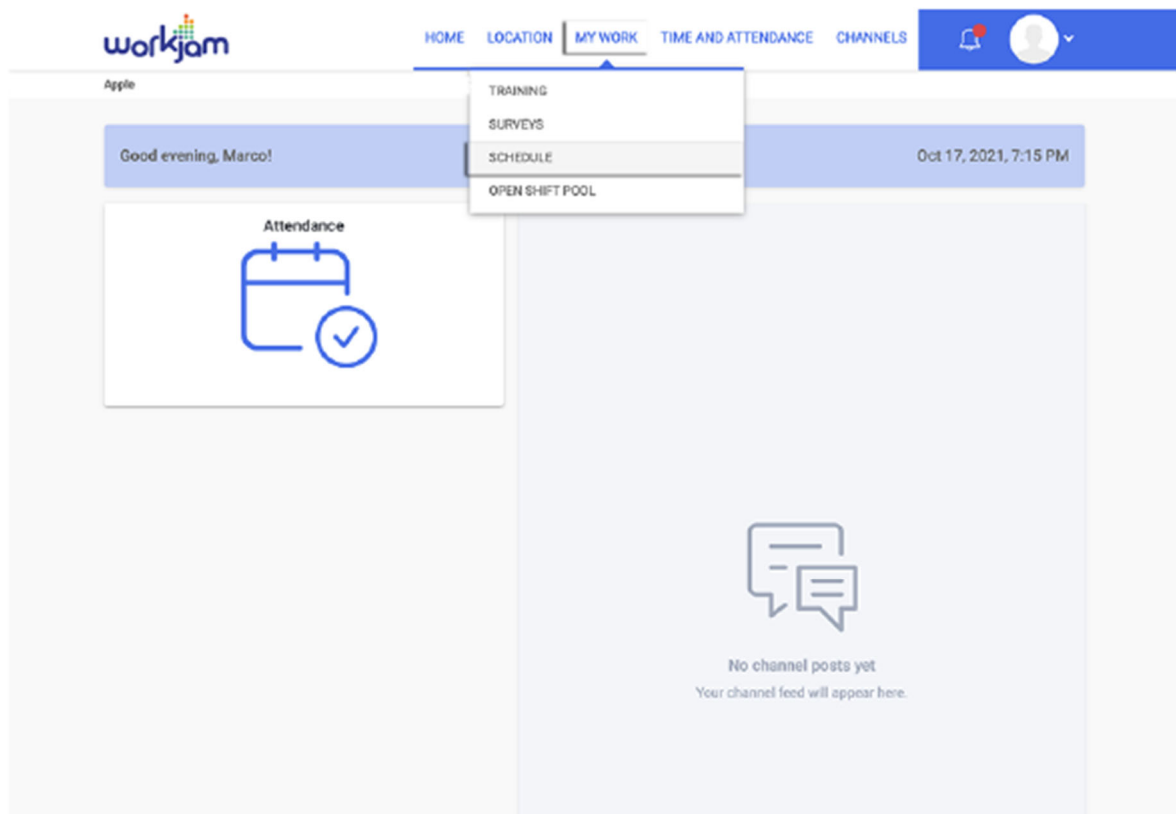
1. Click **My Work**, and then choose **Schedule**.

   > ⚠ You should see the current schedule and availability (if any) by default.

2. Click **Submit availability** above your schedule to open the window on the right side of the screen.

On IOS ⌄

2 Choose a start week.

1. Choose the start date for the new availability.
2. Select the first day of each scheduled week.

⚠ The updated availability takes effect after the next scheduling period begins, which may vary by country and business group.

On IOS ∨

3 Choose a preference option.

1. Choose one of two options from the menu:
   - **Preferred Shifts.** Select the preferred hours of work within each day of availability.
   - **Preferred Days Off.** Select up to two preferred weekdays off, and the hours you prefer to work on weekend days.
2. Click the arrow to see the **Availability Rules** for each option.

On IOS ⌄

4 Set your weekly availability.

⚠ You receive an error message and cannot save your day and time preferences if your availability conflicts with the **Availability Rules**.

1. Click **Days available** to set the day or days you're available.
2. Deselect **All day** if you have specific hours of availability. **All day** is selected by default to indicate availability for an entire 24-hour period.
   - If you deselect **All day,** enter the timeframe you're available to work in the **Starts** and **Ends** fields. You can set multiple time segments on the days you selected.
3. Select your availability type:
   - Choose **Available** to provide the exact times and days you're available to work.
   - Choose **Preferred available** to provide a timeframe for your preferred work schedule.
4. (Optional) You can add another time segment on the same day or days you selected. Simply click the plus sign (+) next to your availability type.
5. (Optional) To add availability details for different days of the week, click **Add another availability** and select your days and timeframes.

On IOS ⌄

5 Verify your availability and submit your preferences.

⚠️ If you need to make corrections to an unapproved request, click either **Edit** or **Retract Availability**.

1. Verify your availability preferences, and then click **Submit**.
2. Select a reason when prompted, and then click **Submit** to view a summary of the details for your availability request.

On IOS ⌄

Was this page helpful? [Yes] [No]   1 person found this page helpful.

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Discounts	Connection
Product Savings	Accessibility
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People How-To > Timecard and Scheduling > Manage Availability Requests in WorkJam

Manage Availability Requests in WorkJam

Learn how to approve availability requests from team members in WorkJam.

Getting started

Sign in to WorkJam.

Getting started on IOS ⌄
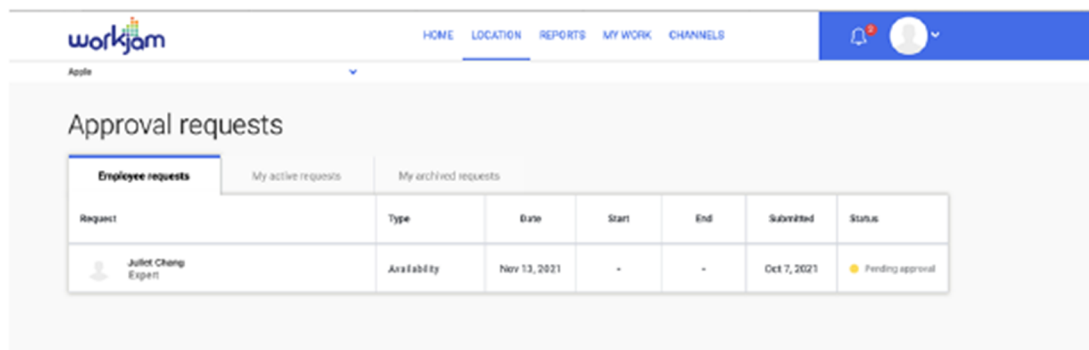
1 View availability requests.

On IOS ⌄

Click the **Location** tab and select **Approval requests,** or select the **notifications Icon** from the top-right corner to view Availability requests from your team.
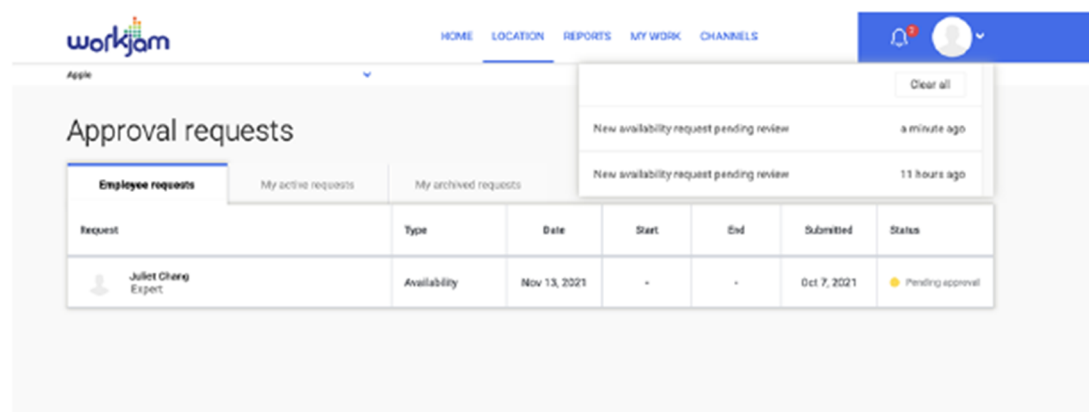
⚠ The **My active requests** tab is visible by default. Select **Employee requests** to view the availability request from the team member.

2

Select the team member.

On IOS ⌄

1. Click the team member's name.
2. Review the request.

3 Respond to the availability request.

On IOS ⌄

Click **Deny**, **Request Changes**, or **Approve**. The form status changes from Pending to the status you choose.

≡ Additional resources

Request Availability in WorkJam ›

WorkJam Overview ›

Timecard and Scheduling ›

Was this page helpful?   Yes   No   0 people found this page helpful.
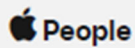
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