

How a homecare software provider automated schedule exception handling with Aspect



At a glance

The Challenge

A fast-growing homecare software provider supported an operation of roughly 130 to 150 people with a lean workforce management team. Attendance exceptions required analysts to review reports from their ACD vendor and reconstruct sign-in and sign-out activity.

The Solution

Using Automatic Schedule Updates within Aspect Intelligence™, the provider connected availability statuses from its ACD vendor with schedules in Aspect Workforce™. Aspect Intelligence created exception segments after configured adherence alarms cleared, giving analysts a consolidated place to begin their review.

Customer

A fast-growing homecare software provider

Industry

Homecare software

Number of agents

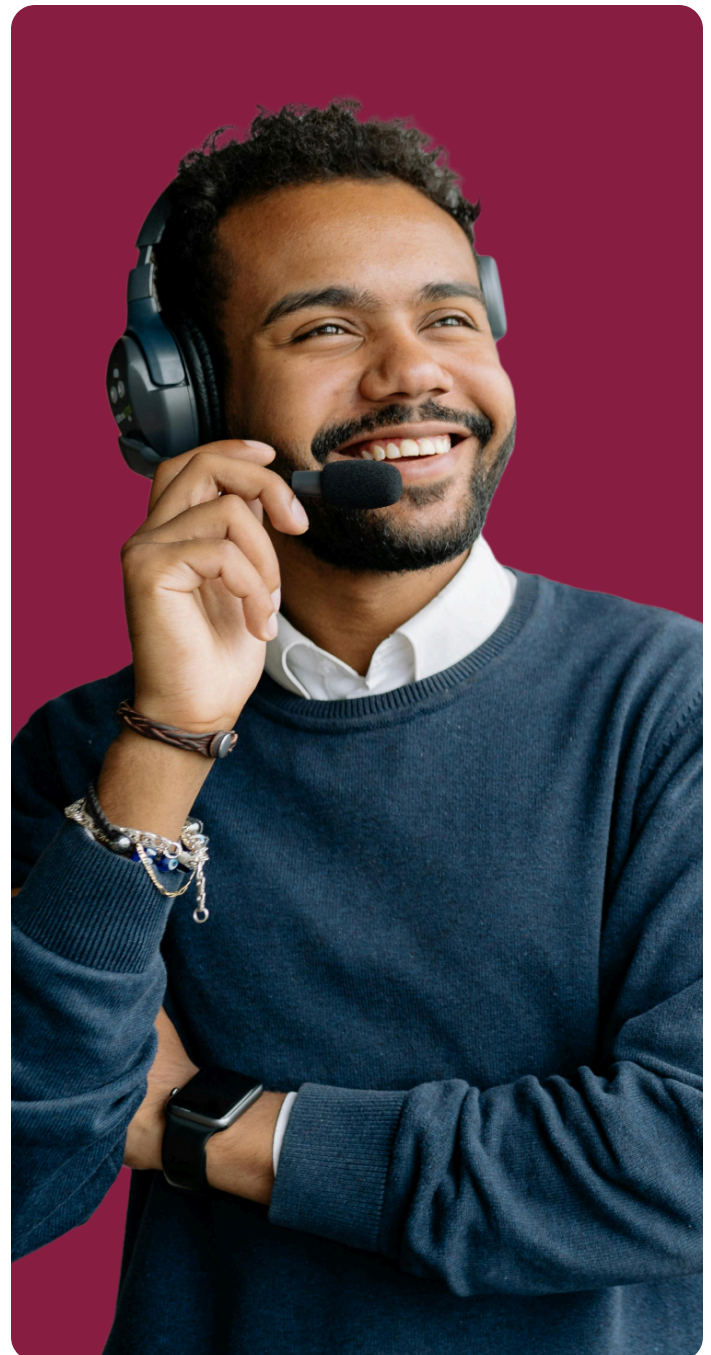
Approximately 130 to 150 people in the operation

Aspect solutions

Aspect Workforce™ and Automatic Schedule Updates within Aspect Intelligence™

The Impact

- ✓ **Automatic update volume**
The system recorded **3,717 automatic schedule updates** from May through August 2026.
- ✓ **Automatic share**
Automatic updates represented **64.2% of 5,790 total schedule updates** during the four-month period.
- ✓ **Sustained adoption**
The automatic share was **64.7% in June, 65.3% in July, and 63.9% in August.**
- ✓ **Operational coverage**
A workforce management function of two analysts plus its manager supported approximately **132 active users** at the time of the customer conversation.



The organization

Over several years, the number of users eligible to use Aspect Cloud new workforce experience grew from roughly 50 to nearly 150. At the time of the customer conversation, approximately 132 users were active in the new workforce experience, with invitations pending for additional employees.

The operating model remained lean as that user base grew. Two workforce analysts and their manager supported scheduling and attendance processes for a group that fluctuated between roughly 130 and 150 people.

Agents were trained to use the new workforce experience interface, which gave the organization a consistent schedule experience while the workforce management team handled adherence and exception review.

Motivation for change

Growth increased the volume of attendance activity that a small workforce management team needed to monitor. The organization was large enough for the work to become difficult for two or three people, but not large enough to justify a six-to-seven-person WFM department.

Before the automated workflow, analysts reviewed their ACD vendor reports to understand sign-in and sign-out activity. They worked backward through the records to determine what had happened and whether a schedule needed correction.

The process became harder to sustain as the user population approached 150. The team needed a more direct way to find late starts and related exceptions without first reconstructing each event across separate reports.

This created several challenges:

- ✓ Growing exception volume
- ✓ Report-based investigation
- ✓ Limited analyst capacity
- ✓ Scattered sign-in and sign-out records
- ✓ Manual schedule corrections
- ✓ Continued attendance-line reconciliation



It's not enough to justify a workforce management team of six seven people, but it's large enough that the work can become overwhelming for two or three people. So that has had a good positive impact for us around the automated changes.

Technical Customer Support Operations Manager
Homecare software provider



Why Aspect

The organization already used Aspect Workforce's new workforce experience as the schedule interface for its agents. Automatic Schedule Updates within Aspect Intelligence built on that foundation, using mapped Amazon Connect availability statuses to initiate schedule changes in Aspect Workforce.

That foundation supported a focused change in the exception workflow. In Aspect Intelligence, administrators could select an alarm definition, assign employee groups, choose the exception segment, set thresholds and rounding rules, and publish the workflow. Aspect Intelligence then applied those rules when the relevant alarm cleared.

The goal was not to remove workforce management judgment. It was to give the team a structured record of potential exceptions so analysts could spend less effort finding the events that required review.

The team's goals were to:

- ✓ Consolidate attendance exceptions in the schedule
- ✓ Reduce report-by-report investigation
- ✓ Apply schedule updates through configured rules
- ✓ Preserve analyst review for ambiguous events
- ✓ Support continued workforce growth with a lean team

The Results

01 Automated 3,717 schedule updates in four months

The customer used Aspect Intelligence's Automatic Schedule Updates based on Adherence to turn scattered login and adherence data into visible schedule exceptions. This helped its three-person WFM team systematically identify, audit, and review attendance issues across an operation of roughly 130 to 150 employees.

The workflow connected adherence events directly to the schedule. When an agent did not log into Amazon Connect at the scheduled start time, Aspect Intelligence created an exception segment after the configured alarm cleared.

From May through August 2026, the provider recorded 3,717 automatic updates and 2,073 manual updates. Automatic updates represented 64.2% of all 5,790 schedule updates recorded during that period.

Automatic share of all schedule updates, May–August 2026

64.2%

Automatic updates

3,717

Manual updates

2,073

Total updates

5,790

Schedule updates by month

■ Automatic ■ Manual



These figures measure adoption of automated updates. They do not establish labor savings, adherence improvement, payroll accuracy, or financial return.

02 Made exception review easier to audit

The generated schedule segments gave analysts a consolidated starting point for daily review. Instead of beginning with individual Amazon Connect reports, the team could open the schedule, review late-start segments, and determine which events were valid.

Analysts still compared the generated segments with the attendance line. They also investigated whether an employee was absent, late, or affected by a system issue before applying the final code.

- ✓ **One schedule view**
Potential exceptions appeared as schedule segments for review.
- ✓ **Focused investigation**
Analysts started with identified events rather than searching for them individually.
- ✓ **Clearer audit trail**
Sign-in and sign-out patterns could be reviewed alongside the employee's schedule.
- ✓ **Human control**
The WFM team retained responsibility for validation and final coding.

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Whenever somebody comes in ... and they're not here on time, having the automated segment [from Automatic Schedule Updates] show up on the schedule for us has been super helpful because we can audit those segments to validate what actually happened and why that person hasn't shown up.

Technical Customer Support Operations Manager
Homecare software provider

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We can look at the segments [created by Automatic Schedule Updates] and make a determination: this person had seven segments throughout the day. Let's investigate why.

Technical Customer Support Operations Manager
Homecare software provider



03 Supported exception management with a lean team

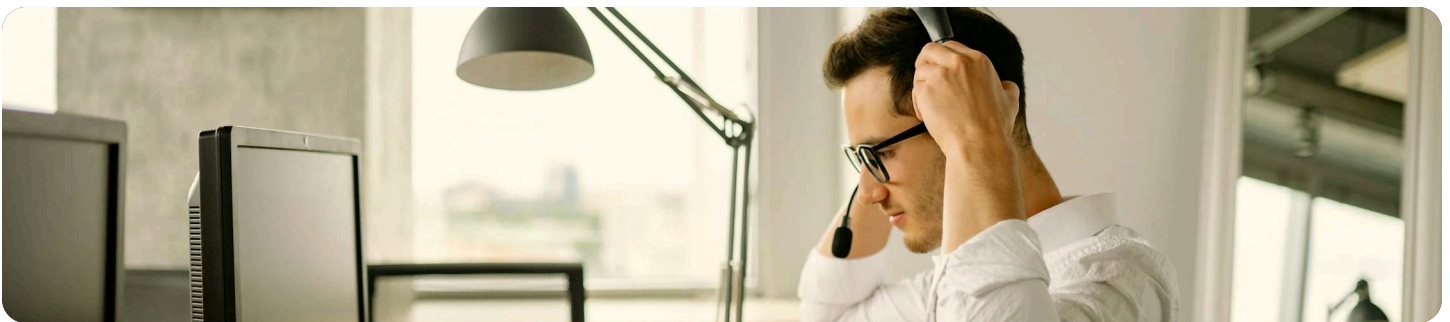
The customer described the automated changes as having a positive impact on its workforce management team. The workflow addressed a practical capacity problem: the operation was approaching 150 people, while the WFM function remained two analysts plus its manager.

The evidence does not quantify time saved or operating-cost reduction. It does show that the team adopted automatic updates for most recorded schedule changes during the four-month period and used the resulting segments in its daily process.

- ✓ **Lean staffing model**
Two analysts plus a manager supported the operation.
- ✓ **Active population**
Approximately 132 users were actively using the product.
- ✓ **Growing scope**
The potential user group grew from roughly 50 to almost 150.
- ✓ **Positive customer assessment**
The customer reported that automated changes had helped the team manage the work.

What stood out

- ✓ **Visible exception records**
Automatically generated segments gave analysts a defined set of events to review.
- ✓ **Configurable automation**
Aspect Intelligence allowed administrators to select alarms, employee groups, exception segments, thresholds, and rounding behavior.
- ✓ **Connected status data**
Amazon Connect availability statuses mapped to the employee's scheduled activity.
- ✓ **Operational judgment remained central**
Analysts continued to reconcile attendance information and investigate system issues.
- ✓ **A consistent agent experience**
Agents used WFX to view schedules without relying on the legacy interface.



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We're having a really good experience with this and it's really helping us out. So, you know, as we continue to grow, I think we definitely want to lean on aspect. I think this is a really good partnership overall.

Technical Customer Support Operations Manager
Homecare software provider

Key learnings

01

Start by making exceptions easier to find before trying to automate every decision.

02

Connect status data to schedules so analysts can review events in operational context.

03

Preserve human validation when absences, late arrivals, and system issues can produce similar signals.

04

Measure automatic and manual activity separately to understand workflow adoption.

05

Design automation around the capacity of the team that must operate it each day.

06

Keep current capabilities separate from requested enhancements when communicating results.



About Aspect

Total amount saved annual by
some enterprise-level clients

\$9.5M

Fewer schedule change
requests

40%

Hours saved annually in
manual admin work

4,500

About Aspect

At Aspect, people come first. That's why we created powerful, intuitive workforce management solutions with humans at the forefront. Built upon more than 50 years of industry-leading experience, we're shifting sights to redefine workforce management.

Our Technology

With Aspect, you will transform your contact center with our enterprise workforce management. Plan smarter and act faster with enterprise workforce management powered by real-time intelligence — unifying AI forecasting, dynamic scheduling, and performance analytics.

About Aspect Intelligence™

At Aspect, we believe AI should empower people, not replace them. Our vision for AI reflects a simple but powerful idea: technology should strengthen workforce capabilities, reduce friction, and deliver measurable improvements to every aspect of workforce engagement management (WEM) — all while maintaining the human connection that is at the heart of exceptional experiences.