

THE ULTIMATE GUIDE TO ROSTERING



Building the perfect staff roster takes more time than you'd probably like to admit. Just when you think you've got it sorted, something changes. A staff member calls in sick, there's a surprise event in town or you realise you've forgotten about an upcoming public holiday. And that's before you've double-checked all the modern awards, staff preferences and cost pressures.

For small and medium-sized enterprises (SMEs) especially, getting your roster right can mean the difference between a profitable week and running at a loss. Our recent [Hiring Snapshot Report](#) revealed that 89% of SME leaders are currently facing staffing shortages, adding even more pressure to creating an effective roster that strikes the right balance.

Whether you're new to staff scheduling or looking to improve your current system, we're here to help you master the art of rostering.

We'll show you how to:

- ✓ Create efficient and effective rosters that work for everyone
- ✓ Forecast your labour needs with confidence
- ✓ Handle seasonal changes and busy periods
- ✓ Make rostering easier with the right digital tools



Ready to master rostering?

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Why is rostering such a challenge?

Keeping the doors open is a challenge in itself for many businesses. Our [Hiring Snapshot](#) found that 56% rely on employees working overtime, while 30% turn to family and friends for help.

Staff shortages, rising wage costs and evolving employee expectations around work-life balance only add to these pressures. Layer in economic uncertainty, complex modern awards and constant changes to employment law and it's clear that getting rostering right is critical to staying afloat.

To strike the right balance, you need to factor in multiple things:

- Understanding and applying the right modern awards
- Predicting business demands across different times
- Managing staff availability and preferences
- Navigating public holidays and penalty rates
- Adapting to local events and weather changes
- Meeting training and qualification requirements
- Following break rules and minimum shift lengths
- Balancing labour costs against expected revenue

Miss just one of these and you could find yourself overstaffed during quiet periods or scrambling for coverage during peak times. And the worst case? You open yourself up to costly compliance breaches that could have been avoided.





The hidden costs of poor rostering

When your roster isn't working efficiently, it has the ability to create a knock on effect that can impact every aspect of your business.

At the top of the list are all the extra unnecessary costs that come with a poorly managed roster. Your bottom line suffers through unnecessary wage costs when you're overstaffed or you risk lost revenue when you don't have enough people during busy periods. And unfortunately, your staff feel the effects too. Poor scheduling often leads to stress, burnout and could result in higher staff turnover. Our [Wellness at Work Report](#) shows that 66% of employees already report feeling burnt out at work, with understaffing often cited as a key factor.

Then there's the admin burden of constantly fixing roster problems, taking valuable time away from growing your business.

What you need to consider when creating a staff roster



Let's talk about making rosters that work for everyone. Creating a roster means balancing legal requirements, team preferences and your business needs, all while keeping costs under control. Here's what you need to know to get it right.

Understand the legal basics

Modern awards and enterprise agreements might not be exciting, but they're essential for compliant rostering. Each award has specific rules about how you can schedule your team and getting it wrong can be costly. In 2023-24 alone, The Fair Work Ombudsman recovered [\\$473 million in underpayments](#), with many cases stemming from rostering mistakes.

Take retail and hospitality as examples. Most retail workers need at least 3 hours per shift, while some hospitality staff only need 2 hours. Then there's casual loading, plus any industry-specific rates you need to factor in.

Make breaks work for everyone

Getting breaks right keeps your team energised and your business running smoothly. Consider how breaks fit into your business operations. For restaurants, you'll want to stagger kitchen breaks so you're not caught short during service. Retail stores need to plan around delivery schedules and peak shopping times.

Manage public holidays

Public holidays need careful planning. You're dealing with higher wages, different minimum hours and your staff's right to refuse work (yes, they can say no if they have reasonable grounds).

Here's what you need to know about [public holiday pay rates](#):

- Full-time and part-time staff rates vary, however usually get between 25% and 50% on top of their normal rate ([check here for specific rates](#))
- Casual staff usually get their usual casual loading plus the public holiday rate
- Some awards have special minimum hours just for public holidays
- You might need to sort out alternative arrangements for staff who normally work on that day

Hero tip: To make public holiday rostering easier, try setting up a volunteer system. This helps you figure out who's keen to work (and earn those higher rates) while keeping things fair for everyone. You might also want to look at tweaking your operating hours based on how busy you usually are. There's no point staying open late if history shows it's not worth it.



Work with your business patterns

Every business has its rhythm of busy and quiet times. Understanding these patterns helps you create rosters that actually work.

Look at your sales data from the past 12 months. When do you need more hands on deck? When could you run a smaller team?



Hero tip: Employment Hero's [time and attendance features](#) help you track patterns and make informed decisions about staffing levels. Plus, our powerful [reporting tools](#) can help you spot these patterns and plan accordingly.

Keep an eye on costs

Every rostering decision affects your bottom line, especially the ones that come from being understaffed. To bridge the gaps, you could be left heavily relying on overtime, which can quickly escalate expenses.

Our [Hiring Snapshot Report](#) revealed that 56% of businesses turn to overtime to manage workloads, which can quickly inflate wage costs and strain already tight budgets. Over-reliance on overtime not only impacts profitability but can also lead to employee burnout, further exacerbating your staffing issues.

To mitigate these costs, you want to prioritise forecasting carefully so you can reduce dependence on overtime and avoid the last-minute scramble to fill shifts. With staffing shortages showing no signs of easing, keeping a close eye on rostering and overtime costs is essential for long-term sustainability.

Essential considerations checklist

Before finalising your roster, make sure you've covered these key points:

- ✓ Double checked award requirements and pay rates
- ✓ Confirmed staff availability
- ✓ Planned adequate break coverage
- ✓ Reviewed historical data for busy periods
- ✓ Balanced labour costs against revenue
- ✓ Built in handover time between shifts
- ✓ Distributed shifts fairly
- ✓ Created backup plans for unexpected changes
- ✓ Communicated clearly with your team
- ✓ Set up a system for managing shift swaps

How to predict and plan your staffing needs

Getting your staffing levels right is crucial for any business. According to our [State of Recruitment Report](#), 84% of businesses struggle with efficient staffing, often because they're not sure how to predict their needs accurately. Let's fix that.

The truth is that most businesses already have the data they need for good planning, but it needs to be put to work. Your point of sale data, timesheets and customer feedback all help paint a picture of when you need more staff and when you could run a leaner team.

The key is matching your staff levels to your actual business needs. Too many businesses either guess their staffing needs or just copy last year's patterns without considering what's changed.



Understand your daily patterns

Look beyond just your customer-facing hours. Think about prep time, admin work, training needs and clean-up time. Even quiet periods will need minimum staff levels to maintain basic operations and safety standards.

Take a look at your:

- Sales data by hour
- Customer counts throughout the day
- Time spent on different tasks
- Regular deliveries or stock tasks
- Admin or cleanup time needed

Remember to factor in setup and closing time too. Having enough staff to prep properly can make your busy periods run much more smoothly.

Build flexibility into your planning

Your staffing needs change throughout the year. A retail store might need extra staff on weekends, while a restaurant might be busier in the warmer months. Most businesses also see seasonal changes.

Consider these factors when planning:

- Local events and festivals
- School holidays
- Tourist seasons
- Competitor activities
- Weather patterns
- Public holidays

Make the data work for you

Businesses have access to more data than ever, but the trick is knowing which numbers matter for staffing decisions. Sales or output per labour hour shows you how productive your team is during different periods. This helps you spot when you're overstaffed (costs eating into profits) or understaffed (team stretched too thin and service suffering as a result).

Customer satisfaction scores also are really valuable when you map them against your staffing levels. A pattern of lower scores during certain shifts or times often points to staffing issues that need attention.

Overtime trends can also reveal hidden staffing problems. While some overtime is normal during busy periods, consistently high overtime usually means you need to take another look at your basic levels of staff and increase your headcount.

Make your forecasts work in real life

The difference between a good forecast and a great one often comes down to how well it works in practice. Businesses with efficient staffing practices will often see lower labour costs while maintaining or improving service levels. This comes from matching staff levels to actual needs, having the right skill mix available and being able to adapt quickly when things change.

When putting your forecasts into action, consider these key areas:

- **Training needs:** Make sure you have experienced staff working with newer team members.
- **Skills mix:** Have the right combination of skills on each shift.
- **Break coverage:** Make sure you can cover breaks without compromising service.
- **Setup and closing:** Allow enough time for proper preparation and cleanup.

Learn from experience

Your forecasts will get better over time as you learn more about your business patterns. Keep track of when your forecasts work well and when they need adjustment. Was that quiet period really unexpected or does it happen every year? Did you actually need those extra staff for the local festival or could you have managed with your regular team?

Get your team involved

Your staff often have the best insights into workload patterns and staffing needs. They know when they're rushed off their feet and when they're standing around with nothing to do.

Create ways for them to share this feedback. It could be as simple as a quick chat during shift handover or notes in your team communication system.



PLANNING CHECKLIST

Use this checklist to make sure your staffing plan covers all bases:



- Analysed historical data for patterns
- Identified peak trading periods
- Planned for seasonal changes
- Considered training needs
- Built in flexibility for unexpected changes
- Got team input on busy periods
- Checked public holidays and local events
- Reviewed labour costs and budgets
- Created contingency plans
- Set up regular review periods

How to manage rosters during busy periods



During peak periods, you need the right people, with the right skills, at the right time. Whether you're preparing for Christmas trade, school holidays or a big local event, your rostering strategy can make or break your success in these busy times.

Smart planning starts early

Start your busy period planning at least 8-12 weeks ahead. This gives you time to hire and train new staff if needed or upskill your existing team. Historical data should be your first stop. Look at your previous years' sales data, customer patterns and staff productivity levels to spot trends. You might notice that Fridays are consistently busier than expected or that school holiday periods need double the usual staff coverage.

Major events in your local area can significantly impact your staffing needs too. Create a calendar that includes public holidays, school terms, local festivals and tourist seasons. The earlier you can identify these busy periods, the more prepared you'll be.

Understand your legal obligations

Peak periods often mean longer operating hours and more complex rosters. But it's crucial to stay compliant with your employer obligations while meeting your business needs. Wage theft claims can increase during busy periods, often due to incorrect payment of overtime and penalty rates.

Here's what you need to know about managing staff during peak times:

- Under the [Fair Work Act](#), employees have the right to request annual leave, but employers can refuse these requests on reasonable business grounds. Be transparent with your team about leave request deadlines for peak periods and how you'll prioritise these requests.
- For public holidays, remember that employees have the right to refuse work if the request is unreasonable. You'll also need to factor in public holiday rates as per relevant awards or enterprise agreements.

Build a resilient team

Don't wait until you're in the midst of a busy period to realise your team needs additional training. Consider implementing regular training sessions where staff can learn different roles or stations. This not only helps during busy periods but also provides your team with valuable professional development opportunities.

Learn from experience

Once your busy period ends, it's tempting to move straight onto the next challenge. However, taking time to review your performance is crucial for future planning. Look at your wage costs as a percentage of revenue, customer satisfaction levels and staff feedback. What worked well? What could be improved? This information is gold for planning your next busy period.

Benefits of digital rostering

Still using paper rosters and WhatsApp messages to manage your team's schedules? There's a better way. Digital rostering is transforming how businesses manage their staff scheduling. Let's look at how making the switch could help your business.

Save time (and stress) with streamlined scheduling

Instead of spending hours on the phone or sending messages, let technology do the heavy lifting. Take our [EH Work app](#) for example, where staff can manage their own availability and shift swaps, saving you valuable time.

With a powerful rostering tool you can also prevent double-booking, scheduling conflicts and have fewer misunderstandings before they happen. In Employment Hero, you'll receive notifications any time it flags potential issues, so you can fix them before they become problems.

Keep costs under control

Managing labour costs is crucial for any business. Digital rostering helps you optimise your spending by:

- Matching staff levels to demand patterns
- Warning you about potential overtime
- Tracking costs in real-time
- Preventing expensive roster mistakes
- Identifying opportunities to reduce spending



Don't risk non-compliance when managing modern awards

The stakes for getting compliance wrong are high. The [Fair Work Ombudsman's latest report](#) shows that workplace law breaches resulted in \$473 million in unpaid wages being recovered last financial year.

With robust rostering software like Employment Hero, you can be informed of potential issues by:

- Calculating award rates automatically
- Managing breaks
- Tracking overtime
- Handling public holiday provisions
- Monitoring staff qualifications

Plus, our system maintains a digital trail of all roster changes and communications which is essential if you ever face a Fair Work audit.

Make data-driven decisions

Digital rostering gives you valuable insights into your business operations that go far beyond just scheduling shifts. By tracking and analysing data on labour costs, productivity metrics, attendance patterns, coverage requirements and cost projections, you can make more informed decisions about your staffing needs.



EMPLOYMENT HERO MAKES ROSTERING EASY

After taking a look at the ins and outs of staff rostering, you might be wondering how to put all of this into practice. Here's how the Employment Hero platform helps take the headache out of staff scheduling.



Say goodbye to modern award interpretation stress

To say modern awards are complicated would be an understatement. With constantly changing rates and requirements, it's easy to make costly mistakes. That's why we've built smart award interpretation right into our rostering platform.

The system updates with the latest award changes and calculates penalty rates, overtime and break requirements in real-time. This means you can focus on creating great rosters and not on decoding modern award entitlements.

Create rosters in minutes, not hours

Remember spending hours juggling Excel spreadsheets and responding to staff messages? With Employment Hero's Employment Operating System, you can create and adjust rosters quickly and easily. Our customers continually tell us they **save hours per week** on roster admin by:

- Using drag-and-drop roster creation
- Saving favourite roster patterns as templates
- Matching employees to shifts based on skills
- Automatically accounting for leave
- Managing shift swaps through our mobile app

Keep your labour costs in check

Making informed decisions about staffing levels is crucial for any business. Our real-time cost tracking shows you exactly how much each shift will cost before you publish the roster. Track department budgets, compare projected versus actual costs and spot opportunities to optimise your labour spend.

Put the power in your team's hands

Best of all, employees have real power over their schedules. With employee self-service through the [EH Work mobile app](#), your team can easily swap shifts and receive instant updates when important news needs to be shared.

The EH Work mobile app gives your team the freedom to:

- View their upcoming shifts anywhere, anytime
- Submit their availability and leave requests
- Swap shifts with qualified team members
- Communicate directly with managers

READY TO TRANSFORM YOUR ROSTERING?

Employment Hero's suite of [rostering tools](#) takes the complexity out of staff scheduling. Our intuitive platform helps you create and manage rosters, while staying across modern awards through built-in rules. Your team can also access their schedules anytime through our mobile app, making it easy to manage availability and leave requests on the go. Plus, our time and attendance features give you real-time visibility of who's on shift, while our cost tracking helps you stay on top of your labour spend.

Take the first step towards simpler, smarter rostering and [book a demo](#) with one of our business specialists today.

