



# Winery Scheduling Starter Pack

A simple, low-cost system to plan coverage during harvest and steady-state operations. Built to work in Google Sheets or Excel and to support bilingual teams (EN/ES).

## What's inside

- **Scheduler Template (XLSX)** with Staff Roster, Availability, Coverage Targets, Auto-Assign (starter), and a printable Week View.
- **Tasting Room Procedures (EN/ES)** quick-reference for opening, service, breaks/timekeeping, closing, and escalation.
- **Manager Checklist** that keeps harvest staffing predictable week-to-week.

## Quick start (15 minutes)

- Fill the **Staff Roster** (roles, languages, min/max weekly hours).
- Collect **Availability** (Y/N by day/slot).
- Set **Coverage Targets** (staff needed + bilingual needs per slot).
- Use **Auto-Assign** to draft the week; copy to **Week View** to print/share.
- Share procedures and expectations with the team (EN/ES).

## What you get (deliverables)

For a typical 30-day winery engagement, Branchline can tailor this starter system to your roles, hours, seasonality, and bilingual coverage.

- **30-day plan** for staffing, onboarding, and manager cadence.
- **Policy templates** (timekeeping, breaks, swaps, and procedures) in plain English; bilingual summaries as needed.
- **Manager checklist** for weekly coverage review and communication.
- **Scheduler template** (Sheets/Excel) configured for your coverage targets.

**Note:** This is general guidance, not legal advice. Confirm Washington labor rules (breaks, overtime, minors, etc.) with qualified counsel for your county/city and business.



# Manager Checklist — Harvest Cadence

Use this as a lightweight rhythm that keeps staffing predictable without turning your life into an endless group chat.

## Week 0 (before harvest)

- Confirm roles, max hours, and bilingual coverage expectations per shift.
- Publish the basics (EN/ES): timekeeping, breaks, swaps, procedures, escalation.
- Collect availability and set coverage targets for Week 1.

## Weekly (15 minutes)

- Review under/over coverage and add cross-trained staff where needed.
- Confirm bilingual coverage for guest-facing slots.
- Publish Week View by Thursday; finalize swaps by Saturday.

## Daily (5 minutes)

- Opening huddle (EN/ES): specials, ID checks, responsibilities, break plan.
- End-of-day notes: no-shows, volume spikes, issues to adjust next week's targets.

**When to upgrade:** If you're scheduling 25+ staff or need forecasting/payroll integration, move to a scheduling platform. The template keeps your rules portable so you can migrate cleanly.