



NUCLEUS
RESEARCH

Zebra ZONE 2025: The Connected Frontline

ANALYST

Charlotte Belke

The Bottom Line

Zebra Technologies is bringing software and hardware capabilities together to support a connected frontline experience, as highlighted in announcements at ZONE 2025. The event detailed an integrated approach to operational management, covering schedule optimization, compliance, inventory visibility, and task coordination. New capabilities include rule-based shift assignments, split and fixed shift scheduling, ADA compliance features, and a mobile-first platform for associates to manage schedules, time-off, shift swaps, and accruals. Management tools feature exception handling, dynamic search, centralized task management, and expanded analytics for labor forecasting and inventory control. The acquisition of Elo expands Zebra's device portfolio, pairing touchscreen displays and point-of-sale hardware with operational management in retail and hospitality. The unified ecosystem also supports device onboarding, reporting, and dashboards for store and regional leaders. Zebra's continued investments and product development reinforce its role as an integrated provider for organizations seeking to manage complex, distributed operations from a single platform.

Overview

At Zebra Technologies' Annual Customer Conference and analyst day, Zebra ZONE, presentations focused on workforce management challenges. These challenges included schedule optimization, compliance, inventory visibility, and improving alignment between the central office and frontline staff. Zebra announced the release of Workcloud Scheduling v45, introducing rule-based shift assignments, split and fixed shift scheduling, and new ADA compliance features for large, multi-location clients. Additionally, Zebra updated the Workcloud Shift app as a mobile-first solution for associates to manage schedules, time-off, shift swaps, and accruals directly from their devices. For management, exception handling and dynamic search are now built into the mobile experience. Attendees also saw the expansion of Zebra's Workcloud Task Management platform, designed to simplify communication, coordinate operational tasks, and expand real-time feedback between store teams and leadership.

Zebra ZONE 2025 featured product launches aimed at unifying task management, scheduling, and analytics within a single operational platform.

AI and Analytics

Zebra expanded its focus on AI and analytics, deepening automation in labor forecasting, scheduling, and inventory management. The Mobile Computing AI Suite, featured throughout product sessions, enables organizations and partners to tailor frontline workflows and reporting without requiring bespoke development. Customers benefit from faster and more accurate labor allocation, simplified compliance controls, and immediate access to insights, from in-store inventory visibility to predictive scheduling adjustments. These enhancements are designed to reduce manual overhead, boost in-store productivity, and help retailers adapt in real time to changing operational priorities.

Live demonstrations included dynamic shift rules, labor forecasting tools, and new mobile-first interfaces to support employee self-service and compliance automation.

Zebra's acquisition of Elo, a provider of touchscreen displays and point-of-sale hardware, expands its device portfolio for retail and hospitality workforce management. The integration of Elo's hardware with Zebra's workforce management software establishes Zebra as an integrated platform provider. In fact, Nucleus found that organizations using integrated platforms achieve a higher ROI compared to those using separate departmental solutions. By investing in end-to-end automation and analytics, Zebra positions its customers to move beyond legacy manual processes and realize practical gains from data-driven workforce management.

Workforce Management Capabilities

Zebra invested in updating its workforce management platform, a point emphasized by leadership and reflected in Chief Product and Solutions Officer Joe White's remarks on increased R&D and collaboration with customers. New features include policy-driven scheduling, shift splitting, multi-level approval workflows for time-off, and enhanced exception management within the manager dashboard, all added to simplify and automate complex scheduling processes. Associates now have expanded self-service capabilities, enabling them to access schedules, swap shifts, and update availability from their own mobile devices. This change eliminated traditional bottlenecks and reinforced Zebra's marketing message of empowering the frontline worker. Customer feedback directly shaped both the redesigned interface and workflow features, with field pilots leading to specific usability and feature adjustments ahead of launch.

The upcoming Digital Access Hub, expected in 2026, will streamline device provisioning through QR-based onboarding, reducing IT burden and accelerating technology rollouts. Reporting and analytics modules break down labor and compliance trends by location, team, and task, and are fully integrated with payroll, time clock, and HR systems. Out-of-the-box dashboards powered by Strategy give store and regional leaders direct visibility into allocation, compliance, and schedule adherence, helping managers make proactive decisions and quickly identify issues. Zebra's commitment to investing in field-driven design and platform extensibility positions customers to realize greater transparency, fewer manual touchpoints, and faster results across large, distributed environments.

Frontline work moves from signal to completion in one system with expected gains in onboarding speed, schedule accuracy, open-shift fill, and compliance visibility.

Workcloud Sync and Shift keep instruction, assignment, coverage, and proof in one flow, so managers publish faster and stores execute more consistently.

Looking Ahead

Zebra's recent announcements point to a single system for frontline execution with Sync at the center, Shift providing coverage, and handheld capture for proof. This approach is expected to convert signals into tasks, route work to the right teams, and keep instruction and completion in one record. As Workcloud BI and a unified access and time capture experience arrive, managers should gain a clearer view of who is on shift, what is assigned, and what is completed while reducing day-to-day friction. Customers should expect practical gains, including shorter onboarding as new hires follow guided steps, faster schedule publication with fewer edits after release, and open shifts that reach qualified staff sooner and fill at higher rates. Compliance is expected to improve through records of work and proof of completion sitting in the same

system. Multi-site operations should see steadier execution across locations, quicker rollout of policy and merchandising changes, and less switching between tools. Overall, Zebra's direction aligns with the shift toward mobile-first and data-informed workforce management. The combination of Workcloud software, purpose-built devices, and expanding integrations positions the vendor to deliver faster decisions on the floor and measurable improvements in schedule accuracy and task completion.