



5 steps to the perfect handbook



Karen Mathie

HR advisor at CharlieHR

What is a company handbook?

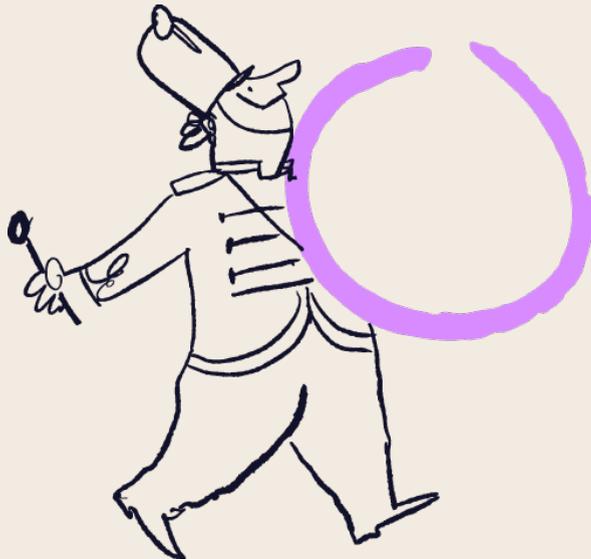
Your employee handbook encapsulates who you are as a company and how you operate. It covers all aspects of working at your small business including:

- Your policies
- Your HR processes
- Your core values and mission

When you're getting started as a business, writing your first handbook gives you a chance to consciously craft your company culture from the beginning.

Far from being a collection of stagnant policies, as time goes by your handbook will be a living expression of your team's norms and processes. It will change and grow with your business, and it will be a constant reference point for you and your team to build on your culture.

In this guide, we look at the 5 essential steps to building a company handbook that reflects your unique culture — so that you can use it to attract, retain and motivate the best talent.



Getting started:

From ticking off legal requirements to following best practice

If you're just getting started at your small business, the first thing you need to do is ensure you are on the right side of the law.

UK employment law requires all businesses, no matter how small, to have three policies on file:

- A Health and Safety Policy
- A Disciplinary/Dismissal Policy
- A Grievance Policy

Ticking off these legal requirements is the first step in building your company handbook. Without these policies, you are left unprotected from legal action, which could mean paying out large amounts in compensation.

So, how do you go about writing these compliance policies?

If you don't have an HR team, you may be tempted to simply copy and paste policies downloaded from the internet. However, these generic templates won't cover your company's specific circumstances.

For example, to create your Health and Safety policy, you'll need to carry out a H&S assessment – an examination of the way your company's work is carried out.

So generic templates that don't exactly reflect the way you work may leave you vulnerable to legal troubles.

The only way to ensure your handbook will protect your company from legal repercussions is to tailor your 3 compliance policies to the way you work as a team.

Want to go even further? Write these policies to fit with your company's tone of voice. Yes, these are legal requirements, but that doesn't mean they should be filled with legal jargon.

You may want to get professional HR Advice on how to craft HR policies that are bespoke to your business while also being legally compliant.

Once that's ticked off, your dedicated advisor will help you choose and create other HR policies to set out how you work. We'll talk more about this in Chapter 3.

Need help crafting your first HR policies?

Talk to our HR advice team today

Book a call



A handbook you and your team can rely on

Your handbook is the place where all of your company's policies and processes live. It is therefore vital that your team can trust the contents of your handbook to be accurate, truthful and actionable.

A first step is to avoid the common mistake of using ready-made handbook templates you can find online. Here's why:

- There is a good chance these are not aligned with current law requirements. How do you know they'll protect you from a legal point of view?
- There is no way for you to find out how these templates compare with today's HR best practice in your industry.
- Even when they are legitimate, most times another company's policy will not be a good fit for your own business.

For your handbook to be actually useful for your business, you must ensure it reflects the way you work, what you believe in and what your team members really need.

Creating a personalised handbook is definitely more effort than just recycling a standard template. But if you want it to play an active role in crafting your company culture, that's the only way to go.

With HR Advice, you get your qualified HR advisor to create the policies your team really needs, tailored to your company's unique context and following HR best practice and employment law. Your dedicated advisor will get to know what sort of culture you're building, and be able to reflect that in your handbook.

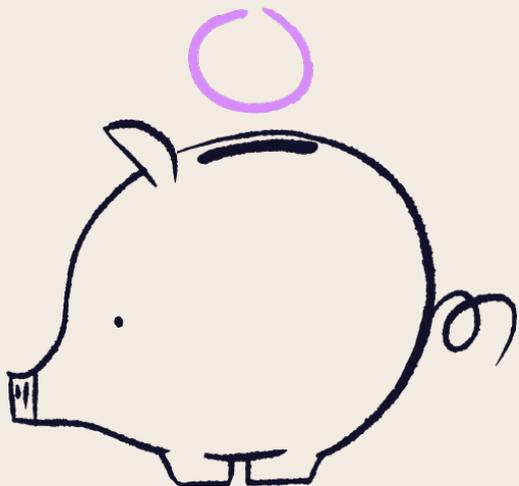
Who should write your handbook?

If you don't have an HR background, it will be difficult for you to build a handbook that is fit for purpose.

On the other hand, an employment lawyer may be familiar with legal requirements, but will struggle to create a handbook that reflects your culture and resonates with your team.

If nobody in the team has expertise in both employment law and HR best practices, you might want to consider delegating the creation of your handbook to a dedicated HR expert.

Talk to the HR Advice team today



A handbook to help you grow your team and scale your business



Basic compliance policies alone (see Chapter 1) don't cover some of the most common HR needs you'll encounter once you start growing your team.

As your small business scales, it'll become more and more important for your handbook to reflect the diverse needs of the talent you want to attract.

Are you planning to bring in new people in the team? This is your chance to craft your company culture from the start – so be proactive and ask yourself:

- What type of people does my business need to grow?
- What HR policies and processes will these people need in order to thrive?

The answers to these questions will inform any necessary updates to your handbook – they'll help you understand what policies and processes you'll need to set out to make your company a great place to work for your new hires. Let's make a couple of examples:

- Are your new team members going to be from an age group when they'll likely be building a family soon? Create a progressive parental leave policy for your handbook.

- Do you want to attract remote talent from around the world? Make sure your flexible working and remote working policies are competitive enough to do so

When you're growing your team and realise your handbook is not up-to-standard, it can be hard to figure out what improvements you need to make and how.

With HR Advice, you'll have a dedicated HR expert advise you on the best policies to attract the right talent to your business.

Not only will they write the policies for you, but you'll have the opportunity to have a new handbook created from scratch to use when onboarding new team members.

Need help crafting your first HR policies?

Talk to our HR advice team today

[Book a call](#)

Making it easy for your team to find and use your handbook

Writing a handbook for your small business is only the first step in the process. It's equally important to ensure your team can easily find it and access it.

It is very common for handbooks to get lost in shared drives, hidden in forgotten subfolders where no one can find them.

When this happens, it becomes impossible for team members to self-serve if they need to check something on your handbook. If your handbook is too hard to find, they'll come straight to you for an answer, which is definitely not the best use of your time.

To avoid that, make sure you store your handbook somewhere your team is familiar with — ideally on a platform they use every day, so that it's handy in case they need it.

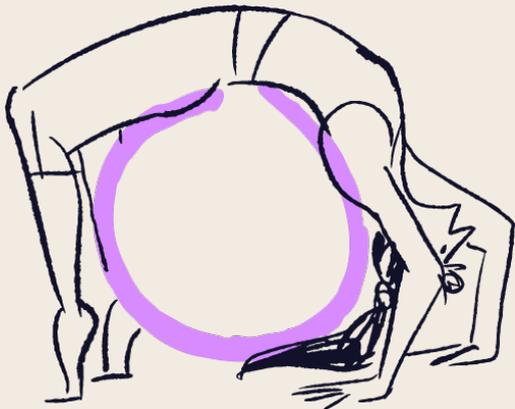
For example, we've made it possible to store your employee handbook directly inside Charlie's HR Software. This way, our software customers and their teams can browse their handbook from the same place where they book time off and complete their performance reviews — and they can do that independently, whenever they want.

Top tip

Don't underestimate the importance of a comprehensive and progressive handbook in attracting and retaining the best talent.

These days, people expect a workplace that runs seamlessly and in a way that is fair, productive and supportive.

Your company handbook is the best tool you can use to show new starters your company is a great place to work.



Keeping your handbook up-to-date

No matter how much effort you put into creating your first employee handbook, that doesn't mean you won't need to touch it ever again.

The needs of your team change all the time – so should the policies you set up to address them. Your handbook serves as the living, breathing embodiment of your company's culture.

So you should always be looking out for ways to make it better and to future-proof it for what's ahead – whether you are growing your team, opening a new office, or trialling flexible working for the first time.

On top of that, the government's annual changes in HR regulations mean that you'll face legal repercussions if you fail to keep your handbook up-to-date.

With HR Advice, your personal advisor will advise you on any changes to your policies, depending on your team's unique circumstances and on HR best practice – so you know your handbook is always the best it can be.

They will also be in touch on a regular basis to inform you of any new legal requirements, so you know you're protected at all times.



Our HR Advice team can help you create the perfect handbook for your business.

[Book a call today](#)

Save time on HR admin

Automate all your repetitive HR tasks and save yourself hours every week to focus on your most important work.

Start our 7-day free trial now



Need help crafting a bespoke holiday policy for your business?

Book a call today

