The Blissbook Policies & Procedures Companion Workbook

Welcome to your Policies & Procedures journey! Use this workbook as a companion to our policies and procedures guide. You'll find checklists, a communications cheat sheet, and even sample email wording.

Before we begin, check off your goals for this project:

- ☐ Review policies to ensure they're still compliant with updated laws.
- ☐ Revamp policies such as parental leave, remote working, data privacy, or others to achieve business goals (e.g. improve employee engagement).
- ☐ Better express your employer brand & company culture during onboarding.
- ☐ Upgrade your legal-speak (read: boring) policies to make them more interactive and friendly for employees.
- ☐ Company is going digital and it's a good time to review content.
- ☐ Fill in your goal(s) here:

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Who to Involve in Your Process

Plus a checklist for what to do with each party.

Executive Leadership

Getting early leadership buy-in will keep your project running smoothly and help you launch more quickly. Since Leadership is easily distracted by other projects, you'll also want to give them ample time to provide content input.

- [ ] Get budget approval for your project
- [ ] Define leadership's idea of a successful project
- [ ] Determine the best timing for launch (consider other initiatives or events)
- [ ] Discuss significant policy changes
- [ ] Update strategic communications (welcome letter or cultural content)
- [ ] Identify leadership's ideal level of involvement

Human Resources (HR)

The first step to a successful project is to know what criteria will be used to judge success. You need to find out what will make the head HR guru (you, maybe) think, "This project went perfectly."

- [ ] Your HR project team: decide who "owns" the project and who supports
- [ ] Define internal budget based on leadership budget
- [ ] Audit existing benefits, policies, and procedures for anything missing
- [ ] Research any changed laws that will impact your project
- [ ] Structure phases with timelines that make sense

Information Technology (IT)

IT's involvement depends on the tools you need and your chosen distribution method (check out the Distribution Methods work sheet for help).

- [ ] Determine how your policies & procedures will be distributed: print, email/PDF, or via software (:cough: Blissbook :cough:)
- [ ] Plan for and evaluate how you'll edit content going forward
- [ ] Decide how you'll collect and store acknowledgements from employees
- [ ] Think through how employees will access content

Legal

Engage your legal team to keep your policies compliant and ensure your policy processes and workflows are set up in a way to minimize litigation risk.

- [ ] Ensure your policies comply with employment law

Using software? Ask your legal team to help you:

- [ ] Evaluate the software from a legal/compliance perspective
- [ ] Read, understand, and/or sign a Master Services Agreement (MSA)

Marketing and Communications

From content to brand design to launch, your marketing and/or communication teams can help you design and launch your handbook.

Tip: Check out the included Communication Strategy Cheatsheat!

- [ ] Can someone help you write or edit policy copy intros or summaries with a conversational, non-legalspeak voice and tone?
- [ ] Obtain graphics, images, or other branding assets from the marketing team to support the design of your policies/handbook
- [ ] If you're going with a printed/PDF handbook, find out the scope and timeline to have it designed, and know how updates will be made
- [ ] Work with the communications team on a launch + distribution strategy (including finding out if there's a newsletter, upcoming event, or other public way to announce the launch)

Communication Strategy Cheat Sheet

Use this cheat sheet to help distribute & promote your handbook/policies.

Your communication strategy should include:

- [ ] A launch notification of your wonderful new employee handbook
- [ ] An invitation template for future new hire employees
- [ ] A template for employees who need a reminder to sign
- [ ] A base template for communicating changes to your policies

A few questions to refine your launch...

Given all the work that goes into updating your policies and creating a new handbook, you want your launch to be as successful as possible. It's a good idea to reach out to your communications team, if you have one, to discuss messaging.

Have them answer the questions below. They can also help you craft your messaging and can advise on the best way to inform people about your new handbook.

Who is the best sender for this email message?

Name

e.g. Acme People Team

Email

e.g. peopleteam@acme.com

Is there an upcoming event where this can be announced?

Don't let your hard work get lost in a sea of email. By making an announcement, your employees can be on the lookout.

Does your company have another channel for an announcement like this?

Take advantage of existing communication channels, like an intranet, employee self-service portal, or Slack. The more the merrier!

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Project Milestones Template

Use this timeline template to outline your project milestones.

Project Foundations

Kind of like getting a building permit... these are the nitty-gritty details to knock out before you can start the project for real.

	Item	Date	Who's Responsible?
☐	Obtain leadership approval to undertake project		e.g. HR
☐	Vendor & contract approval from IT & Legal		
☐	Paperwork is complete (e.g. W9s, vendor setup, initial payments, etc.)		
☐	Ask your software vendor (if you're using one) about vendor-specific tasks		

Content Creation, Editing, Review, and Approval

The most variable and likely the lengthiest part of your project. Timing depends on your team's motivation, current workload, the amount of changes you're making, etc.

	Item	Date	Who's Responsible?
☐	Create new or edited content		
☐	Request feedback from your HR team and make changes		
☐	Request a review by legal counsel and make changes		
☐	Request feedback from leadership and make changes		
☐	Repeat previous 3 steps as necessary...		
☐	Content approved!		

Distribution Prep

You will likely need to involve your IT department at this stage. These tasks can take 2 days or 2 months, depending on how you've decided to distribute your policies and the competency & workload of your IT department. Pro-tip: Do these tasks concurrently with the above content tasks as they're mutually exclusive.

	Item	Date	Who's Responsible?
☐	The audience for your new policies has been determined and the tasks to ensure that audience can successfully access the policies after launch have been completed. Using software? ☐ Upload/sync your employee list ☐ Set up Single Sign-On ☐ Set up custom domains		
☐	Check and make sure your launch email will be delivered successfully (won't be caught by spam, etc.) and, if using software, adjust any necessary settings		

Project Milestones Template (cont.)

Content & Design Implementation

You may need to involve your marketing team, although that varies greatly by project.

	Item	Date	Who's Responsible?
☐	Send content & branding guidelines to vendor or 3rd party, if you're using one		
☐	Review resulting design with marketing team		
☐	Circulate final design within HR for feedback		
☐	Send final design to leadership for feedback		
☐	Repeat previous 3 steps as necessary...		
☐	Your policies are designed and ready to launch!		

Launch

The big day! Pick a day and time when your audience will pay attention.

Your Handbook Launch Day

	Item	Date	Who's Responsible?
☐	First signature reminder is sent (e.g. a week before it's due)		
☐	Second signature reminder is sent (e.g. on the due date)		
☐	Third signature reminder is sent (e.g. a couple days after the due date)		

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Email Templates

Use these email templates to distribute and promote your new handbook.

① Sample Email Launch Notification

When you launch your new handbook to your existing audience, you've got to tell them about it!

> Hello,
>
> We're excited to announce the launch of our brand-new digital Employee Handbook! It has everything you need to know about working at Acme and, because it's digital, you can access it 24/7 from any device.
>
> Please take a moment to read through the Employee Handbook and acknowledge your receipt within.
>
> You can access the Employee Handbook here: [insert link]
>
> If you have any questions, let us know.
>
> Have a great day,
>
> Your People Team

② New Employee Invitation

After the initial launch, you'll be onboarding new employees to your handbook constantly. Instead of crafting a new email every time someone new joins, have a template ready to go!

> Hello,
>
> Welcome to Acme! We know you're curious about how things work around here, so please take some time to view your digital Employee Handbook. After you've reviewed the content, confirm your acknowledgement by signing the form within.
>
> Since the Employee Handbook is digital, you can access it 24/7 from any device by signing in at [insert link].
>
> If you have any questions, let us know!
>
> Have a great day,
>
> Your People Team

③ Sample Acknowledgement Form Reminders

There's a good chance some employees will need a reminder to sign their acknowledgement. Or maybe several!

> Hello,
>
> Don't forget! The Employee Handbook still requires your signature. Please take a moment now to read it and sign the digital acknowledgement form within.
>
> You can access the Employee Handbook by logging in here: [insert link]
>
> If you have any questions, let us know!
>
> Have a great day,
>
> Your People Team

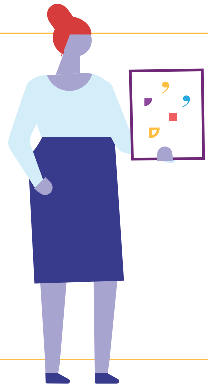
④ Sample Change Communication

Updates are inevitable – whether dictated by the legal landscape or your company's internal rules. When changes arise, you need to be sure all employees receive (and sometimes acknowledge) the most up-to-date information.

> Hello,
>
> We've made some updates to our Employee Handbook. Please take some time to view this most recent version of it.
>
> Make sure you check out these sections:
>
> Name of section (hyperlinked): Short summary of change; be specific, but concise.
>
> Example Telecommuting: Telecommuting arrangements will now be reviewed annually instead of every six months.
>
> Example Inclement Weather: Changed phone number for inclement weather closings.
>
> Example EAP: We have partnered with EmployeeHelp to offer an employee assistance program.
>
> After reviewing the changes, please acknowledge your receipt within. [only include if you're asking for acknowledgement]
>
> If you have any questions about the updates, let us know.
>
> Have a great day,
>
> Your People Team

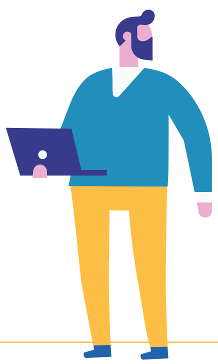
Distribution Methods

A checklist of considerations for each policy distribution method.



Printed Handbook

- [ ] Make sure the company name, version #, and the date are on **every single page**
- [ ] Include chapter titles and page numbers on every page
- [ ] Ask IT or marketing if your internal printers can handle the volume / quality needed
- [ ] Research outside vendors to compare costs
- [ ] Ask outside vendors about print turnaround time + shipping and delivery



Digital / Electronic Document

- [ ] If using a PDF, always link to it instead of attaching in an email to ensure employees are looking at the most current version
- [ ] Check document for places to add clickable links
- [ ] Ask IT where your handbook file should live and the best way to distribute it
- [ ] Ask about access control or permissions on the document
- [ ] Set up a system/workflow for future edits (version control, how to communicate, etc.)
- [ ] Identify your signature collection software and do a dry run of the workflow

Software / External Vendor (Like Blissbook!)

This is the recommended form of delivery, as it's efficient, reduces risk, and provides the best employee experience. Plus, depending on the software you choose, you can use video, gifs, read-more buttons, or other design elements to make your policies less of a drag for employees to read and sign (electronically, we hope).

- [ ] Ask IT about approved vendors or the process for approving vendors
- [ ] Ask about Single Sign-On to ensure it's easy for employees to access
- [ ] Ask IT about a custom domain if possible through the software
- [ ] Research vendor's capabilities for distribution and acknowledgement

Be a Handbook Superhero.

Blissbook is everything you need to create, distribute, and maintain an online employee handbook.

Visit us at blissbook.com