Employee Handbook Preparation Checklist

☐ Collect all relevant policies and procedures that cover issues like recruitment, training, performance, promotion, discipline, recognition, termination, etc.

☐ Determine employee handbook format (for example, online or printed) and update policy (for example, via email notice with link to updated handbook).

☐ Gather content from contributors, including images and updated copy for each section of the handbook.

☐ Update the employee handbook with every revision of your company's policies, so the handbook is relevant and consistent with the company's policies.

☐ Organize the handbook sections chronologically, alphabetically, or in order of importance.

☐ Consider removing jargon, qualifying words (e.g., "very"), technical terms, and unfamiliar company terminology and acronyms in order to improve readability.

☐ Highlight valuable information with graphs and images.

☐ Use active, direct language and avoid passive statements.

☐ Delete repetitive information.

☐ Format for readability with proper spacing and clear headings that guide the reader.

☐ Use bullet points and tables to summarize and highlight significant information.

☐ Adopt the appropriate tone for an internal audience (for example, "we" instead of "the company").

☐ Remove clichés, buzzwords, or unnecessary phrases.

☐ Edit for brevity.

☐ Include only need-to-know information and delete unclear content or information better communicated with in-person training.

☐ Verify that headings and subheadings used throughout the handbook match the table of contents and page references.

☐ Include a conclusion to welcome the employee, promote the onboarding process, or describe desired outcomes for the employee.

☐ Add helpful links to additional resources, such as the company intranet or helpful websites. It is a good idea to include the URL for the online version of the handbook in all static and hard copies of the handbook.

- [ ] Include a separate signature page for employee and company file.

- [ ] Ensure that your legal team or attorney reviews and approves the final version of the handbook before publishing.