New Dynamics

Policies and practice

How to write and maintain an employee handbook

Take a handbook from policy inventory through drafting, local review, employee testing and maintenance.

Practical guidance · Worked examples · Printable worksheet

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Inside this guide

Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Take a handbook from policy inventory through drafting, local review, employee testing and maintenance. This practical guide to how to write an employee handbook brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Begin with an inventory

Collect the policies, contracts, process notes and existing handbooks employees already use. Record the owner, last approval date and intended audience of each item. Mark duplicates and contradictions before drafting a new document.

Ask employees and managers which questions are hardest to answer. Use those questions to shape the contents. The project should produce a reliable route through work, not simply a longer document with a new cover.

Decide what belongs in the handbook

Separate navigation from detailed policy rules. The handbook can explain how to request leave and link to the approved policy that contains local entitlements. This reduces the risk that two documents describe the same rule differently.

Agree which information is global and which belongs in a local appendix. Confirm the legal entity, worker groups, languages and accessibility needs. Ask the relevant reviewer how the handbook relates to employment contracts and which changes require consultation or agreement.

Draft in employee language

Use a consistent pattern: what the topic covers, what the employee should do, what happens next and where to ask for help. Put the action near the start. Explain unfamiliar terms once and use them consistently.

Replace vague claims with instructions. Instead of “we promote transparent communication,” name the channel for a routine question and the separate route for a sensitive concern. Keep internal administrative detail out unless it helps the employee make a decision.

Worked example: replacing old remote-work guidance

Illustrative scenario: a handbook still describes an emergency pandemic arrangement. The editor checks the current approved working policy rather than simply deleting the date.

HR confirms eligibility and approval routes; IT checks equipment guidance; the relevant local reviewer checks employment implications. Employees test whether they can understand how to request an arrangement and where exceptions go. The revised handbook links to one current policy and records when the old section was retired.

Drafting and approval worksheet

- **Topic and user question:** What should an employee be able to find out?
- **Authoritative source:** Which approved policy or process supplies the answer?
- **Draft owner:** Who writes and checks the operational facts?
- **Specialist review:** Who checks local law, privacy, security or payroll where relevant?
- **User test:** Can employees find and explain the next step?
- **Approval:** Who authorises publication and the effective date?
- **Maintenance:** What event triggers an update, and who owns it?

Track unresolved decisions separately from the publishable draft. Do not leave internal comments, placeholders or contradictory appendices in the final employee version.

Publish with a maintenance rhythm

Communicate the main changes and where the current handbook lives. Provide accessible alternatives and a way to report a broken link or unclear answer. Give managers a short briefing on changes they need to explain.

Schedule periodic checks and event-driven updates when a policy, system or requirement changes. Keep version history and approval records. Sample common tasks after publication to confirm that the handbook remains useful in practice. Start with the employee handbook framework if you need a contents structure.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Create a contents inventory from existing documents and common employee questions. Mark each item as current, conflicting, missing or awaiting approval. Assign a topic owner. This exposes decisions that need resolution before writing and prevents the editor from silently inventing policy to fill an attractive contents page.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Draft one complete section using a consistent pattern: purpose, employee action, next step and contact. Review operational facts with the owner and legal implications with the appropriate specialist. Ask a reader unfamiliar with the process to explain what they would do. Revise language they cannot interpret confidently.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Introduce a policy change while the handbook is still in review. Decide which draft changes, who rechecks it and whether approval must be repeated. Also test a broken source link. The workflow should prevent a polished handbook from publishing outdated instructions simply because a page was approved earlier.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Prepare a release checklist covering approval, accessible formats, current links, communications and archived versions. Give managers a summary of the changes they need to explain. Identify who receives corrections after publication and how urgent errors are fixed without losing the version record.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

Should we start from a handbook template?

A template can provide a contents structure and drafting prompts, but it cannot establish your organisation’s rules. Check every section against approved policies, actual workflows and local requirements. Remove irrelevant material and fill gaps deliberately. A shorter accurate handbook is more useful than a comprehensive-looking template containing terms, contacts or promises that do not apply.

Who should review the draft?

Use topic owners for operational accuracy and the relevant specialists for employment, privacy, security or payroll questions. Include employees and managers to test whether the instructions are understandable and accessible. Name a final approver and a central editor who resolves inconsistencies. Review should have a clear purpose; circulating a draft widely without decision ownership can create conflicting comments and delay.

How should we handle several countries or entities?

Identify the common information and separate local terms and procedures where they differ. Make the applicable audience obvious so employees do not follow the wrong appendix. Use local review for legal and contractual content. Maintain ownership and version control across the whole set, and avoid implying that a single global paragraph overrides requirements or arrangements in a particular location.

Review the first cycle

Review how many employee questions the new handbook resolves without further explanation and where readers still reach the wrong document. Check whether policy owners are notifying the editor of changes. Improve the maintenance workflow as well as the wording; a well-written handbook becomes unreliable quickly if ownership is unclear.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

New Dynamics connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete guide library for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation’s approved records. This page is for your own working notes.

Topic and user question: What should an employee be able to find out?

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Draft owner: Who writes and checks the operational facts?

Specialist review: Who checks local law, privacy, security or payroll where relevant?

User test: Can employees find and explain the next step?

Approval: Who authorises publication and the effective date?

Maintenance: What event triggers an update, and who owns it?

Discuss your next step with New Dynamics: contact@new-dynamics.com