

# The effective<sup>HRM</sup>

## 2023

# HR CHECKLIST

You can't afford for anything to go wrong this year. It's 2023 and it's time to get your HR sorted



You know how important HR is, but as a busy business owner it keeps getting pushed to the bottom of your priority list.

2023 is the year you get this sorted, and have peace of mind knowing you, your business and your employees are protected in the correct way.

That's why I created this 2023 HR checklist.

It covers every aspect you need to know to ensure your business stays legally compliant, you're following your duty of care, looking after your employee's health and wellbeing, and creating a happy and efficient workforce.

**There's a lot to consider so if you need help, just give us a call and we'll be there to support you.**



# 1

## Are your contracts, policies and handbooks up to date?

It's really important to make sure all of these documents are up to date. To ensure this, reviewing them once a year is best practice.

This protects your business, your employees, and keeps you on the right side of the law.

### What documents are most important?

There are many forms of HR document. Which ones are right for your business may depend on the nature of what you do. Some may be formal, and some informal. But there are a number of essential documents that you must have as a minimum...

### A written statement of particulars

Usually part of an employment contract, this outlines details of a contract, such as salary and start dates.

Essential policies  
(Typically included in your employee handbook):

- Maternity/paternity/adoption
- Absence
- Performance
- Redundancy
- Equality and diversity
- Equal opportunities
- Data protection and security
- Bullying and harassment

### Disciplinary and grievance procedures

Not only should you have a policy that complies with the ACAS Code of Practice, but you should also keep details records of any cases that arise.

### Disciplinary and grievance procedures

You should ensure you have up-to-date job descriptions for every role within the business, recruitment process documents, performance appraisal documents, onboarding procedure documents, and employee management and record keeping documents.

### Exit documents

You may also wish to have clear documents and policies in place for when an employee exits the business.



## 2 Are you legally compliant?



**Compliance is vital for your business not only to ensure its smooth running, but also to avoid fines and even criminal charges.**

Your business should be committed to following the working standards set out by UK employment law. It affects your policies, procedures, and documentation, as well as your day-to-day responsibilities.

Statutory compliance is your legal obligation set out by legislation.

Regulatory compliance is a legal obligation by a regulatory body. Your health and safety would fall into this category, for example.

Contractual compliance is your obligation to your employee, and vice versa, as set out by your employment contracts.

Failure to comply with any of these could result in criminal charges.

## 3 Have you created a people plan to help you achieve your goals in 2023

**In order for your business to hit its goals in 2023, it's vital that you have a solid people plan.**

To create this, you'll want to understand the needs of your business, and the goals you've set.

Looking at strengths and weaknesses is important so that you can identify opportunities and threats, as well as spotting which of your people can grow and progress in certain ways with training and development.

One of the best ways you can learn which of your current employees may go on to develop and grow with the company is by conducting regular employee appraisals.



# 4

## Do you have a training plan in place for you and your managers?



Many business owners spend a lot of time upskilling and developing their teams, working on their business culture, and making sure they're taking mental health and wellbeing seriously.

But often, they forget to place a focus on their own development, and that of their managers.

You and your managers hold the business together. It's important to invest in your skills too.

As well as developing knowledge, there are many leadership skills you and your managers can work on.

These can be skills such as communication, awareness (mental health, diversity, etc.), and decision making.

All of which will make your people happier and more productive.

# 5

## Use internal audits and surveys to fix stuff that's broken

**Do you understand the areas of your business that need to be worked and improved on?**

That's not a trick question. Sometimes as business owners we are so focused on the bigger picture, that the smaller details escape us.



If you aren't sure, you may wish to conduct an internal audit, or even survey your people (which can be done anonymously) to discover any problems or issues you may not have noticed.

Most often, this may be issues to do with workplace culture. Problems around stress, bullying, or harassment often go unnoticed and unreported.

By giving your people an opportunity to highlight issues anonymously, you have a better chance of discovering the things that need your attention and working on ways to fix them.

# 6

## Work with an expert HR consultant to make sure you have the right support

**To work on all of this stuff alongside your usual job is going to be very time consuming.**

Some people may relish the challenge. But imagine spending all that additional time working on your business growth instead.

By working with experts (like me and my team) you can make sure everything is done exactly as it should be, everything is legal and compliant, and nothing is forgotten.

Can we help you get your HR in order this year? If you'd like to discuss what we could do, give us a call to arrange a conversation.



# NEED SOME EXPERT HR ADVICE?

Simply contact our team on 03300 414589 or email  
us at [hello@effective-hrm.co.uk](mailto:hello@effective-hrm.co.uk)