**Small Business Policy Template**

Processes, procedures and standards explain how a business should operate efficiently and consistently. They should be used as training tools and standards for assessment of staff performance.

**Instructions:**

1. Document key operational procedures from first customer contact.
2. Utilise [government policies](http://www.eoc.sa.gov.au/eo-business/employers/employer-toolkit/eo-policies/small-business-policies-and-procedures) for legal requirements such as anti-discrimination.
3. Ground all policies, procedures and standards in the vision and strategy of your business.
4. Clarify general business procedures as well as role-specific ones, and keep documents short and concise.
5. Keep them live on a central drive accessible to all.
6. Design them to empower and inform, rather than constrain staff.
7. Review and update annually or more frequently if necessary.
8. Ask for feedback, particularly from frontline staff who use them day-to-day.

**Guide**

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| Title | A clear, searchable title. |
| Version control | Keep a consistent numbering standard across all policies. |
| Dates | * When policy came into effect.
* Any revisions.
* Approval by management.
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| Authorisation | Sign-off of authorised person, who is responsible for maintaining policy. |
| Use | The who, what, when, where, why and how. Keep it as a brief overview. |
| Policy/procedure/standard | This will be the majority of your policy and procedure. Create a step-by-step guide that’s logical and easy to follow for someone who has never completed the actions before. |
| Examples | Include screenshots and scenarios to make the policy/procedure/standard relevant and easy to understand. |

**Checklist**

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| Does the policy/procedure/standard adhere to all relevant laws? |  |
| Are all standards required for licensing and other regulations met? |  |
| Has the policy been walked through by operational staff to ensure it works and is relevant? |  |
| Are screenshots and other examples attached? |  |
| Has it been signed off by the relevant manager? |  |
| Is it clearly labelled and easy to find? |  |
| Has it been included in any induction and ongoing training schedules? |  |
| Does the policy work from a customer’s perspective? |  |