

HR Essentials Checklist

When it comes to HR, getting the basics right protects both your business and your employees. Small businesses don't need to be overwhelmed – start with the essentials first, and build on them as you grow. This checklist helps you prioritise key HR actions, stay compliant, and create a positive workplace culture.

Area	Action	Done
Building the foundations – employment contracts	Essential: Provide new starters (even casual/part-time staff) with a written statement of employment particulars, setting out the main terms of employment, such as: • Employee and employer names; • Job title; • Pay; • Working hours; • Holiday entitlement; • Place of work; and • Notice periods. As of April 2020, employers are legally required to provide this information from day one.	☐ ☐ ☐ ☐ ☐ ☐ ☐
	✳ Recommended: While a simple contract can be enough, consider adding additional information (e.g. probation period details, confidentiality clauses, flexibility clauses, etc.) to provide clarity and help prevent disputes.	☐
	Make sure you're using the right type of contract for different categories of workers: • Permanent (full- or part-time): For ongoing employment with no fixed end date. • Fixed-term: For a set period or specific project, such as maternity cover or seasonal work. • Zero-hour or casual contracts: For work with no guaranteed hours, offered as needed. Ensure these are used fairly! • Apprenticeship agreement: For employees completing apprenticeships, often supported by government funding.	☐ ☐ ☐ ☐
	Review contracts regularly as roles or laws change. ℹ Remember: When contractual terms change – for example, after a successful flexible working request – there's no need to issue a new contract. A 'Variation to Contract' letter confirming the changes and the effective date will suffice. ★ Tip: Use standard contracts to ensure consistency, save time and make updates easier as your business grows.	☐



WorkNest's Employment Law and HR experts can provide you with a suite of compliant, professionally drafted contracts that protect your business, reassure staff, reduce disputes, and demonstrate credibility.

Building the foundations – basic policies

Essential: Ensure you have the following essential policies in place:

- Disciplinary (legally required)
- Grievance (legally required)
- Health and safety (legally required if you employ more than five people)
- Leave (absence, holiday, family, i.e. maternity)
- Equal opportunities / anti-discrimination
- Bullying and harassment
- Data Protection (UK GDPR and Data Protection Act 2018)

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★ **Tip:** These policies don't need to be lengthy or complex!



WorkNest can help produce your business' essential HR policies, ensuring they are simple, compliant, and fit for purpose.

Building the foundations – basic policies

★ **Recommended:** Consider implementing the following 'nice to have' policies:

- Flexible working
- Social media / IT use
- Performance management
- Remote/hybrid working

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Create simple template letters for warnings, absence reporting, etc.

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Develop clear process maps/flowcharts.

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Set policy review dates.

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Create an employee handbook – a single, accessible document that outlines your company's rules, policies, procedures.

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Essential: Reference key policies such as disciplinary, grievance, and absence.

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Outline basic standards/expectations.

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Building the foundations – employee handbook

★ **Recommended:** Strengthen your handbook by including:

- Your company values and mission;
- An FAQ section for new starters; and
- Signposting to support/resources.

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📌 **Remember:** When it comes to contracts, policies and handbooks, 'nice to have's' can be added over time – don't let perfect be the enemy of good!



WorkNest can provide you with a legally compliant employee handbook that's consistent with your contracts and provides clear guidance on your policies, expectations and procedures.

Recruiting and onboarding staff	Avoid costly hiring mistakes by: • Taking your time – define the role and what you really need. • Avoiding hires who are ‘just like you’ – diversity brings fresh strengths and perspectives. • Checking references and confirming right to work.	☐ ☐ ☐
	Create clear job descriptions: • Be specific about duties, skills and expectations. • Include straightforward language. • Avoid jargon and ‘buzz words’ there for the sake of it.	☐ ☐ ☐
	During interviews: • Ask about values and work style – not just the CV. • Tie your questions to what makes your company tick and find people who’ll thrive in your culture. • Score fairly, keep it equal, and ditch the bias.	☐ ☐ ☐



WorkNest’s fixed-fee recruitment support takes care of everything – from reviewing job descriptions and preparing adverts to shortlisting candidates, arranging interviews, and conducting post-offer checks.

Recruiting and onboarding staff

Create a clear induction plan to help new starters get up to speed, reduce the risk of early leavers, and build engagement.

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★ **Tip:** A structured first day and week makes all the difference, but don’t overcomplicate it. Focus on the basics: IT access, introductions to the wider team, assigning a buddy or mentor, and scheduling check-ins with the line manager.



Managing absence and wellbeing	Manage short-term absence (up to four weeks, usually unplanned and sporadic) by: • Holding quick check-ins and return-to-work chats; • Offering flexibility, such as remote work or adjusted hours; • Encouraging open conversation about health and workload; • Providing temporary lighter duties or a minimal phased return if needed; • Allowing time (or at least flexibility) for medical appointments; and • Signposting to mental health or wellbeing resources.	☐ ☐ ☐ ☐ ☐ ☐
	Manage long-term absence (four weeks or more, e.g. serious illness, surgery, mental health) by: • Maintaining regular, sensitive contact to stay connected; • Discussing needs and barriers to returning to work; • Involving Occupational Health or HR for advice; • Considering reasonable adjustments, such as changes to role, hours, or equipment; • Planning flexible or phased return-to-work arrangements; and • Providing ongoing support for mental or physical health needs.	☐ ☐ ☐ ☐ ☐ ☐
	Ensure timely and accurate absence recording by: • Using a simple absence log (spreadsheet or template); • Recording the date, reason, duration, and any notes; and • Keeping records confidential and up to date. ★ Tip: Don't overcomplicate things – simple, consistent processes work best!	☐ ☐ ☐
 WorkNest can help you to put these processes in place and manage issues fairly, consistently and efficiently – reducing business disruption and legal risk.		
Creating a positive culture	Encourage openness, recognition and feedback by: • Making it safe to speak up and share ideas; • Celebrating wins, big and small (a simple “thank you” goes a long way); and • Asking for feedback and acting on it – show you’re listening.	☐ ☐ ☐
	Setting the tone as a leader by: • Leading by example (your attitude is contagious); • Being visible, approachable, and consistent; and • Sharing your vision and values – remind people why you do what you do. 📌 Remember: Your culture sets the tone for how people treat each other, drives engagement, trust, and retention, and shapes your reputation as an employer (word travels fast in the small business world!)	☐ ☐ ☐

Handling
performance
and conflict**Bake performance management into everyday practices by:**

- Holding regular check-ins and one-to-ones with your team;
- Giving on-the-spot praise or constructive feedback;
- Using coaching, mentoring, or buddying schemes to support development; and
- Addressing small issues early rather than waiting for them to escalate.

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Remember: Everyday performance management boosts morale and motivation, prevents small issues from becoming big problems, and builds trust and openness.

Implement formal performance management processes:

- Conduct quarterly or six-monthly appraisals.
- Hold end-of-year reviews with goal setting.
- Use Performance Improvement Plans (PIPs) for ongoing or unresolved concerns.
- Keep written records of discussions and agreed actions.
- Ensure clarity on expectations, provide support, and set clear timeframes.

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Reminder: Formal performance management may be necessary when informal measures don't lead to change.



WorkNest can guide you through the process – from approaching the initial conversation to setting objectives, reviewing progress, and taking appropriate action if things don't improve.

Tip: Act early, start with regular informal feedback, and use formal reviews to support growth – not just to 'fix' problems!



Handling performance and conflict	Spot and address early signs of tension: • Watch for changes in mood, communication breakdowns, or 'us vs them' attitudes. • Don't ignore small issues – address them early. • Where possible, resolve conflict informally as the first step. • Remember your company values – use them to guide discussions and reinforce the behaviours your organisation expects.	☐ ☐ ☐ ☐
	Aim to resolve conflict early – but take further action if needed: • Start with an informal chat to resolve issues early. • If tension continues, try mediation with a neutral third party. • If that doesn't work, follow your formal grievance process. • Escalate further if needed, aiming for a fair and lasting resolution. ★ Tip: Conflict is always easier to resolve where there's an existing culture of trust.	☐ ☐ ☐ ☐
 From management training to specialist mediation and facilitation support, WorkNest can help you prevent and resolve workplace conflicts before they escalate.		
Saving time and driving efficiencies	Implement simple systems and checklists: • Use ready-made checklists for onboarding, absence management and performance reviews. • Keep processes clear, simple and consistent – no need to reinvent the wheel.	☐ ☐
	Use shared folders, templates and calendars: • Store key docs in shared folders (e.g. OneDrive, Google Drive). • Stick to templates for contracts, letters and policy updates. • Utilise shared calendars for key dates: reviews, holidays and training.	☐ ☐ ☐
	Automate reminders: • Set up calendar alerts for probation reviews, appraisals and absence follow-ups. • Use simple HR software (like our HR platform, PeopleNest) or free tools to automate reminders.	☐ ☐

Avoiding legal risks

Avoid discrimination by understanding the nine protected characteristics under the Equality Act 2010:

- Age;
- Disability;
- Gender reassignment;
- Marriage and civil partnership;
- Pregnancy and maternity;
- Race;
- Religion or belief;
- Sex; and
- Sexual orientation.

❓ **Did you know?** Discrimination claims are rising – disability discrimination is now the most common Employment Tribunal claim. Even small businesses must comply from day one – no exceptions.

Avoid common pitfalls by:

- Ensuring your contracts are robust, relevant and up to date;
- Following proper disciplinary or grievance procedures;
- Being alert to the early signs of employee dissatisfaction;
- Accommodating disabilities (making reasonable adjustments); and
- Training managers on legal obligations.

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From expert guidance to training managers in employment law essentials, WorkNest helps employers reduce risk, preserve their reputation, and protect their bottom line.

Are you outgrowing DIY HR?

If HR tasks are taking up too much time, you're unsure about legal requirements, or employee issues are becoming more frequent and complex, external support can take the pressure off.

From professional advice and policies to simple software platforms, WorkNest's Employment Law and HR solutions simplify people management, reduce the risk of costly legal mistakes, and let you focus on growing your small business. **HR sorted. Stress reduced.**

For peace of mind,
contact our team today:

➔ worknest.com

☎ 0345 226 8393

