

Benefits of Policy and Procedure Management Software

Any employee in the corporate sector is familiar with the drill that occurs upon accepting a job offer: An HR person presents them with a packet of various documents to read through, each one bearing a signature line that must be filled in to affirm acceptance of the particular terms and conditions included within. Frequently, these documents will include an employee handbook, as well as a collection of briefer documents relating to workplace etiquette and other issues pertaining to day-to-day activities at the company.



In a well-run organization, the persons in charge of devising these policy and procedures documents put a lot of time and energy into their assembly—for good reason. There are a number of important legal and practical considerations that these documents must cover. In recent years, the business community has turned in growing numbers to policy and procedure management software to help them handle the creation and distribution of this vastly important documentation. So what is policy and procedure management software? What does it do? What benefits does it bring? Let’s take a closer look at this software.

What Are Policies and Procedures?

Despite what some believe, the two terms are not interchangeable. In essence, a policy is a broad guideline for action, while a procedure is a relatively detailed set of instructions for carrying out a specific action. It may be best to illustrate the distinction through a specific example. In some companies, employees are required to report the hours they worked and then send the information, often in the form of an invoice, to the accounting department. Therefore, it is the company’s policy that employees are required to send in these invoices. The company’s procedure refers to the way the employees provide this information: which document to use, what information to include, the content person to whom it should be sent, the deadline by which the information must be submitted, and so on. Generally, procedures will be updated more frequently than policies.

Common Problems with Policies and Procedures

A business is simply asking for trouble if it fails to disseminate company policies and procedures in a proper manner. What many business owners do not fully appreciate is that the courts often treat employee handbooks and related documentation as legally binding agreements. Serious legal consequences can result if these documents are bungled, if the company cannot prove that a particular employee received them, or if an important policy update wasn’t properly distributed to the workforce. If a fired employee files a wrongful termination suit, these documents will likely receive close scrutiny at the hearing.

A business also must ensure that its employees understand all applicable governmental regulations in effect. There isn’t sufficient space here to list the “alphabet soup” of regulatory agencies currently operating, each of which with a range of influence depending on the size and nature of the businesses it has been charged with overseeing—but

it is certain that your company is under the jurisdiction of one or more of them. A sound policy and procedure management system will keep your personnel from inadvertently flouting the law.

Aside from the legal aspects of these documents, a business that fails to draw up a proper set of policy and procedure papers may cause all sorts of unnecessary pain and problems for its employees. Productivity will suffer if employees are unaware of the proper manner of handling various business functions. Interpersonal conflicts may result if not everyone realizes that certain activities have been forbidden by official company policy.



What Policy and Procedure Management Software Does

Policy and procedure management software provides a company with an easy-to-use, centralized, web-based solution for creating, distributing, and storing these all-important documents. A first-rate software solution of this nature should allow a company to generate a large variety of documents, including PDF files, PowerPoint presentations, Excel, MS Word, pictures, and even audio/video files. This allows the company to distribute training videos and similar educational presentations in addition to text-based files. When these files are distributed to employees, the software keeps track of who has (and has not) viewed, tested, and acknowledged the videos and/or documents—there is no uncertainty as to whether a particular employee has “got the memo.”

The centralized nature of this management software allows company personnel to view official policy and procedure documentation with ease, in a searchable, readily accessible format. Employees may then be prompted to take a test on the document, if included, to ensure knowledge- before signing off with their electronic signature. It can also store earlier versions of an updated document, which makes it clear precisely when specific policies and procedures went into effect. The company also has the ability to restrict access to certain documents so that a particular employee will not be able to view the confidential information of others. Any given document may be sent to an individual, a specific department, or the whole company.

This management software has been designed for long-term use—it will store all this information securely for years to come, providing a repository from which valuable data can be retrieved if a legal issue should arise in the future. All information is stored on secure servers.

The Further Advantages of Using Policy and Procedure Management Software

So what else can this software do for your business?

Automation: The distribution and collection of these documents can be managed with minimal human involvement. The system can be configured to send automated emails to employees with instructions for accessing

the relevant documents; other kinds of notifications are possible, including text messages. As a result, HR need not waste time gathering and handing out this material.

Comprehensive Document Distribution: This software can be used to manage much more than just policy and procedure documents. It is also possible to distribute surveys, questionnaires, knowledge tests (yes/no, multiple choice, and fill-in-the-blank), and more. By providing a simple way to gather this info, the software can supply executives with a wide range of pertinent company data.

Contact Management Capabilities: Policy and procedure management software also carries the incidental benefit of providing a useful database of employee data—email addresses, phone numbers, emergency contact information, and other important stats.

Import Documents: Not sure how to generate the right kind of policy and procedures documentation? This software allows the user to import files from outside sources.

Virtually Unlimited Storage: Though not infinite, a document management system permits the long-term storage of many thousands of documents—much more space than even most large corporations would ever use.

ComplianceBridge has helped over a hundred other organizations with these exact processes, including dozens of health care and medical centers. ComplianceBridge is committed to maintaining relationships with our clients first and foremost, and are always looking to add to our network of friends and co-pilots in our effort to properly and effectively manage policies and procedures.

COMPLIANCEBRIDGE
21701 Stevens Creek Blvd. #1205
Cupertino, CA 95015
(800)-317-2820
moreinfo@compliancebridge.com
www.ComplianceBridge.com