

Manager Handbook Template

Use this handbook to organize the decisions, conversations, and procedures a manager performs through the employee and performance life cycles. Complete it with approved organizational policies and label any guidance that applies only to a particular location or employee group.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Your Role as a Manager

Describe the manager's responsibilities and decision boundaries before the detailed processes. Give a new manager a clear route for advice and approval.

Field	Complete with
Role expectations	[Team responsibilities, people-management duties, and applicable scope]
Decision rights	[Decision, manager authority, required approval, and escalation route]
Starting in the role	[Orientation, key relationships, first priorities, and learning resources]
Support network	[Human resources, specialist roles, systems, and contact references]

Hiring and Onboarding

Separate the hiring decisions from the procedures that implement them. Use approved selection criteria and preserve the organization's offer and onboarding process.

Field	Complete with
Workforce request	[Business need, role scope, authorization, and position-request reference]
Recruitment and selection	[Approved criteria, interview process, decision roles, and records]
Conversation guide	[Purpose, consistent job-related questions, evidence to record, and candidate questions]
Offer and onboarding	[Approval, offer process, new-hire preparation, responsible roles, and readiness checks]

Leading the Team

Create repeatable conversation and coordination records that connect priorities to work. Keep commitments and follow-up visible without inventing organizational rules.

Field	Complete with
Priorities and delegation	[Outcome, responsible person or role, decision boundary, and completion evidence]
One-on-one conversation	[Purpose, observations, employee perspective, support needed, and agreed next steps]
Team meeting	[Decisions needed, preparation, discussion points, actions, and owners]
Communication	[Approved channels, handoffs, escalation, and ways-of-working references]

Performance Management

Follow the organization's performance cycle in order. Keep evidence, the employee's perspective, and the approved decision process distinct from a manager's initial observation.

Field	Complete with
Planning	[Role expectations, goals, measures, resources, and review arrangements]
Monitoring and feedback	[Work evidence, observations, employee response, and agreed support]
Development and appraisal	[Learning plan, approved rating or appraisal process, and supporting records]
Recognition and follow-up	[Approved recognition route, decisions, commitments, and next review]

Performance and Conduct Issues

Use the approved process for the type of concern and identify when a specialist role must be involved. Keep a conversation record factual and separate from the formal decision record.

Field	Complete with
Concern and scope	[Observable work or conduct concern, evidence, applicable policy, and affected scope]
Advice and process	[Required specialist involvement, approved procedure, and decision authority]
Conversation record	[Purpose, evidence discussed, employee response, support, and agreed actions]
Review and records	[Approved improvement or formal process, follow-up, privacy reference, and appeal route]

Pay Time Leave and Work Arrangements

Record the manager's task and approval boundary for each request. Link to the applicable policy rather than restating eligibility or entitlements from memory.

Field	Complete with
Request type	[Time, leave, compensation, promotion, flexibility, or other covered request]
Applicable rule	[Approved policy, entity, location, employee group, and current version]
Manager action	[Required checks, consultation, approval route, communication, and system update]
Records and exceptions	[Decision evidence, privacy reference, exception process, and escalation]

Compliance and Employee Relations

Give managers the approved route for reporting, supporting, and escalating employee-relations matters. Distinguish a manager's immediate responsibility from work assigned to a specialist.

Field	Complete with
Topic and scope	[Approved equality, harassment, accommodation, safety, ethics, privacy, or labor-relations reference]
Manager responsibility	[Required action, decision boundary, and specialist role]
Reporting and support	[Employee and manager channels, alternative route, and immediate source-defined action]
Information handling	[Approved confidentiality, record, access, and follow-up requirements]

Employee Changes and Separations

Document each transition as its own process. Keep responsibilities for communication, work handover, access, property, and records visible.

Field	Complete with
Transition	[Transfer, role change, resignation, separation, or other covered change]
Approval and preparation	[Applicable policy, decision authority, specialist consultation, and readiness]
Execution	[Communication, handover, systems, access, property, and responsible roles]
Completion	[Required evidence, outstanding actions, employee question route, and record reference]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Manager Resources

Keep the forms, systems, approval routes, and common questions a manager needs in one reference section. Identify the current authoritative version of each resource.

Field	Complete with
Resource catalog	[Form or system, purpose, access requirements, and current reference]
Approval matrix	[Decision or request, permitted role, approver, and exception route]
Common question	[Question, approved answer, and applicable policy or process]
Terms and updates	[Defined terms, ownership, update route, and change history]