

Manager's Checklists

Quick, practical checklists for the employee situations owners and managers deal with most. Print them, keep them to hand, and work through them calmly when something lands.

When it's bigger than a checklist

If a situation feels serious, or you're not sure how to handle it, take the free Employee Situation Check at magentahrconsulting.co.uk for an honest read in about three minutes, or book a free call with Samantha.

BEFORE YOU ACT ON ANY EMPLOYEE ISSUE

The single most protective habit: pause and check these before your next move.

- ☐ I am clear on the facts, not just how it feels
- ☐ I have written down what has actually happened, and when
- ☐ I have checked how similar situations were handled before, for consistency
- ☐ I am acting on evidence, not in the heat of the moment
- ☐ I know whether anything sensitive applies (sickness, disability, a grievance, pregnancy, long service)
- ☐ I have taken advice before any formal step or difficult conversation

HANDLING A GRIEVANCE

A complaint handled fairly protects you, even if it does not really stack up.

- ☐ Acknowledge the complaint in writing
- ☐ Follow a clear, consistent grievance procedure
- ☐ Make sure the person it is about is not investigating or hearing it
- ☐ Investigate the facts properly before deciding
- ☐ Hold a meeting and let the employee be accompanied
- ☐ Give a clear, reasoned outcome in writing
- ☐ Offer a right of appeal to someone not previously involved

RUNNING A DISCIPLINARY

With conduct, the process matters as much as the decision.

- ☐ Investigate and establish the facts first
- ☐ Put the allegations to the employee in writing
- ☐ Give reasonable notice of the hearing
- ☐ Allow the statutory right to be accompanied
- ☐ Base the outcome on evidence, applied consistently
- ☐ Confirm the outcome and the reasons in writing
- ☐ Offer a right of appeal

MANAGING LONG-TERM SICKNESS

Move carefully: this is where uncapped discrimination claims start.

- ☐ Stay in supportive, regular contact and keep notes
- ☐ Get a proper medical or occupational health view before deciding anything
- ☐ Consider whether disability law may apply
- ☐ Look genuinely at reasonable adjustments and a phased return
- ☐ Only consider a capability process if a sustainable return is not realistic
- ☐ Take advice before any decision to dismiss

BEFORE A DIFFICULT CONVERSATION

A few minutes of preparation changes how it lands, and how it ends.

- ☐ I am clear on the one message I need to land
- ☐ I have specific facts and examples, not generalisations
- ☐ I have chosen a private, appropriate setting
- ☐ I have thought about how they might react, and my response
- ☐ I will listen as much as I talk
- ☐ I will agree clear next steps and write them down afterwards