The Policy Binder is Extinct

Why smart brands have gone digital for Policy Management

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Your policies and SOPs are what turn your "Brand Promises" into a playbook for employees to deliver the optimal customer experience and ensure the quality, safety, compliance, and consistency of operations across all your locations.

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It's imperative for growing and leading brands to establish and maintain company policies and standard operating procedures (SOPs). They don't just protect your organization from potential litigation. **More importantly, they empower your employees with clear instructions and expectations, helping to create a culture of operational excellence that can lead to increased customer loyalty.**

But creating and maintaining policies and procedures can be a daunting task. Today's operating environments are complex and in constant change. Managing that change, communicating updates, and ensuring employees are all operating on the same page can be challenging.

Gone are the days where policy manuals can sit and gather dust on a shelf - the old 'Policy Binder' is extinct and a new approach is needed.

Businesses today need a more dynamic and robust system to ensure operational consistency, quality, safety, and compliance. That's why more and more smart brands are going digital to manage policies and procedures and communications with employees.

But first things first...

What are Brand Standards?

Brand Standards is a term used to describe the key touchpoints, processes, amenities, products, and services that define the customer's experience with your brand. It provides a picture of what your business is and, perhaps, what it isn't.

Brand standards provide you with the following:

- A set of expectations and guidelines for how to operate the business, and perform a role, or task.
- Ensures consistency in your products, and how your guests are to be served.

They include everything that must be done (regulatory and voluntary standards) and everything that should be done—it's what makes your brand unique.

Your Brand Standards are an ethos, your "way to play", and what differentiates you from your competition. Simply put: Brand Standards are what make your business, your business. It's what makes Chick-fil-A, Chick-fil-A; Starbucks, Starbucks; and Burger King, Burger King.

Your Brand Standards should be apparent for both first-time customers as well as loyal patrons. And undoubtedly, it's part of the reason customers become fans and keep returning for more.

To fulfil your "Brand Promises" you need Company Policies and Standard Operating Procedures—as well as the ability to execute them consistently at scale.

Your Brand Standards consist of several components:

01
Company branding, statement and messaging

02
Company Policies

03
Standard Operating Procedures (SOPs)

04
Voluntary and Regulatory Standards you comply with

05
Expected service and standards to measure against

The Importance of Policies and Procedures

Your Policies and SOPs are what turn your "Brand Promises" into a playbook for your locations and employees.

It's the toolset to ensure an optimal customer experience, and things like food safety, worker and guest safety, and consistency in your operations.

Policies and SOPs are used by brands to drive quality, and to ensure there is clarity in expectations and uniformity in work processes from one location to another. That consistency is what allows a customer to walk into any location, anywhere in the world, and have a clear idea of what to expect—each and every time.

It's not only companies that benefits from proper brand standards and SOPs.

According to a recent report on the State of the American Workplace, there's a strong link between both the employee and customer experience, stating **that happier employees are more likely to result in happier customers.** They also found that employees are more satisfied if they have clear work expectations and are provided with the right tools for the job.

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"Keep in mind, your SOP is a guide, not a bible—it's meant to influence, not command. SOPs address expectations related to quality control, company standards, and the process for effectively completing projects." Your SOPs can and should be updated in order to augment and improve wherever possible. And this can be done by both management and employees.

Forbes.com

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It's helpful to think **of your Policies and SOPs as a living document rather than a sacred text.**

Your Policies and Procedures create protocols and guidelines for employees to follow, so that they are able to maintain consistent quality, by simplifying complicated processes.

As an example, if you're a retail food establishment, your Policies and Standard Operational Procedures may include:

- Expectations for employees from appearance to hygiene, to HACCP procedures and safe food handling.

- Guidelines for the various restaurant work processes including use of equipment, maintenance, chemicals, and pest control.

- The "flow of food" including purchasing, receiving, storing, preparing, plating, serving, and waste management.

- Instruction on service and hospitality expectations when interacting with guests.

- How to deal with reports of foodborne illness, customer complaints, physical hazards, and respond to food recalls.

- Brand specific programs for quality, safety, and compliance.

- Applicable regulatory standards and how to comply.

The benefits of up-to-date policies have become even more apparent with the COVID-19 pandemic. Almost overnight, restaurants and other retailers (and most other businesses) had to adapt their sanitization practices and operations to ensure staff and customer safety. Companies with digital systems were able to adapt quickly and get ahead of COVID-related challenges, while other brands were immediately on their back foot, and were struggling to catch up.

Without Policies and SOPs firmly in place, the actions taken by various employees are likely to lack consistency. Some workers may be going about tasks properly, while others aren't. As you might imagine, this can create a variety of issues within a location. A customer's experience will vary from one visit to another, since it's completely contingent upon who's working that day. And in the light of the pandemic, this can also affect your customer's safety and peace of mind.

This is a serious problem for just a single establishment, but you can imagine on a global scale, the issues and inconsistencies can multiply exponentially.

That said, let's get to the heart of the issue...

What is
Policy Management?

Policies are guidelines that outline your business's strategy for operating at its best, reducing risks, addressing issues that may arise, and ultimately helping your team to deliver on your brand values and promises to your customers. It's basically the bridge between your vision and values, and **how you execute them in your day-to-day operations**. Having a comprehensive set of policies and procedures allows your employees to know your organization's vision, what you expect from them, and how to achieve both.

Policy management is the process of creating these policies, communicating them, and ensuring they're adhered to. As a business leader, you may see it as a necessary evil and perhaps even an inconvenience. But policies and procedures are the foundation of your organization's playbook.

Manage them properly, and you will mitigate potential risk and your business will run like a well-oiled machine.

With a traditional approach there's a bunch of work that goes into policy management. Creating, reviewing, and approving new policies and procedures often **requires collaboration among leadership** and therefore requires excellent document management and version control. You then also need to communicate new and updated policies to employees, ensuring policy compliance, and operational consistency across all your locations.

💡 Still doing it
the hard way?

Policies and procedures alone won't get you very far.

Without a fully effective management system, they can quickly become useless. Trying to **manage evolving policies and procedures, informing your employees of changes, and monitoring compliance**, will be unnecessarily difficult if you're relying on outdated paper-based systems.

Creating, maintaining, versioning, publishing, and, in some cases, printing and shipping all those binders is a big job (and expensive!).

Keeping your content, locations, and employees up to date with the appropriate and applicable changes takes a bunch of effort. Your content can be out of date just as soon as you ship it out.

Doing it manually just doesn't cut it, and it can have little impact on sustaining any organizational improvement over time!

For brands that have multiple concepts, or do business in multiple countries or regions, it can get very complicated and difficult to manage.

What is Policy Management Software?

Policy management software provides you with a web-based application that allows you to create and organize policies and procedures, making it easy to review, manage, and communicate in real-time with your employees. It also makes your digital policy manuals easily accessible in real-time to your employees via a web browser or app.

So How Do You Create Your Own Unique Playbook?

01

Start with great content

02

Tailor it to the job at hand

03

Make it available in real-time

04

Leverage it everywhere

How Do I Choose the Right Policy Management Software for My Company?

Here are a few factors to consider when considering Policy Management Software.

01 Creating relevant policies for different employees

There are many policies used within an organization (e.g., employee attendance, code of conduct, use of company property, discrimination, health, and safety, etc.). But they aren't all relevant to every single employee. This is where access and version controls are useful. You should be able to modify policies, varying content applicable to the user. Access control ensures employees only see policies relevant to their specific job function.

- There's an increase in accidents, food safety failures, or customer complaints;
- Employees are confused regarding their day-to-day responsibilities;
- Your organization starts producing inconsistent results;
- Regulatory requirements (either in your own organization or by external bodies) change.

You need software that makes managing these updates quick and easy. Look for authoring tools that will simplify this process, e.g., drag-and-drop, rich text editing, and sufficient storage. Content should be enriched with images, photos, multimedia, and also linked to operational activities including audits, self-assessments, checklists, and inspections.

02 Easy updates

Policies aren't stagnant. They need to be updated on a regular basis whenever:

- You buy new equipment or software;
- You launch new products or services;

03 Publishing policies

Once you update your policies, you'll want to publish them and distribute the content to all relevant employees. You should be able to use your Policy Management Software to either publish it immediately, or schedule it for a future date and time.

04   Easy access

We've all rummaged through a policy binder in the search of information at some point in our lives. A great policy or procedure is only good if you can actually find it. With the right tools, you no longer need to rummage through your dusty binder when an incident occurs. Instead your software should allow your employees to access relevant content quickly and conveniently, and easily search for relevant information.

05   Better direction and operational performance

A big reason why so many large distributed organizations with high turnover (like restaurants, hotels, grocery chains, and retailers) struggle isn't a lack of employee training. Rather, it's providing proper direction, instruction and reinforcement within the context of their daily routines.

With the right software solution, you can link your brand standards, policies, and SOPs to specific operational activities. This gives your employees not only the instruction they need, but the context required to execute at their best.

As you can see, having a proper policy management system is absolutely essential for your organization. Keeping track of all policy changes, knowing who made those changes, and facilitating proper communication among your employees is far more manageable when you go digital.

First Mover Advantage

Global Food Safety Initiative (GFSI) and DNV GL conducted a survey in 2019 and found that food and beverage establishments are generally slow to embrace technological advancements. While this means digital transformation across the industry might be lagging, it represents a big opportunity for forward thinking brands.

CMX1's
PolicyStudio

If this eBook has served its purpose, by this stage you should have a strong understanding about the benefits of investing in Policy Management Software, and what to look for when considering the best solution for your needs.

In this final section, we'll highlight some of the key features of **CMX1's Policy**Studio, so that you can start to assess if it's the right solution for your company. It's the solution trusted by some of the world's best known brands, and because it's part of the CMX1 EQMS Platform, it will scale up to meet your needs as they evolve over time—everything from Operational Excellence to Supply Chain Quality.

Intuitive Digital Authoring Tools

With **Policy**Studio, you can finally ditch the manual processes and "old dusty binders". Replace them with a powerful policy management program for creating and publishing your brand standard guides, policy manuals, and SOPs—all while keeping your employees up-to-date on the latest content. Publish your materials to specific user groups or company-wide in real-time.

Use the drag-and-drop editor to easily develop guides, policy manuals, and training content. All searchable and rich with instructions, images, photos, embedded multi-media, and links to supporting content and documents.

Access and Version Controls

PolicyStudio includes intuitive features for **cloning, versioning, and publishing your content**. This makes it easier for reusing and varying your content for different user groups, concepts, or regions. Access Controls ensure users only see what is applicable to their job function or location type.

Immediate or Scheduled Publishing

Content can be updated and immediately published across all your forms and locations on the fly or scheduled for a specific date and time. **Give your employees instant access** to relevant content via web and mobile access. No more digging through the BOH looking for the "dusty binder".

Web and Mobile Optimized for Access and Search

Once your content is published, **Policy**Studio creates **a unique URL that can be embedded into other websites** and software applications.

Link to Questions in ActivityStudio®

Link your standards, policies, and SOPs to questions in **Activity**Studio®. Give employees the direction needed within the context of a question to reinforce brand standards, and promote best practices and know-how.

CMX

Want to know more?

Download our module guide for PolicyStudio (CMX1's Policy Management solution) to learn more, or better yet, get in touch and let one of our product experts show you how CMX1 can help you achieve Operational and Quality Excellence across your organization—whether you're a regional chain or a global giant.

DOWNLOAD