

checklist for organisational review

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Recruitment

Ensure all job descriptions, person specifications, and application processes are up to date and stored securely. Use recruitment websites and tools effectively while minimising discrimination risks. Provide managers with recruitment training and maintain a candidate data privacy policy.

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Pre-Employment Checks

Follow up on references and conduct necessary background checks, including DBS where required, using trusted providers.

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Right to Work

Verify right-to-work documentation for all candidates and monitor visa status where applicable. Maintain clear processes for tracking and renewing work authorisations.

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Offer Letters & Contracts

Issue conditional offer letters and ensure all employment contracts are signed before the start date. Keep templates and signed documents securely stored.

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Record Keeping & Compliance

Maintain secure and compliant storage of employee records, ensuring data protection requirements are met.

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Terms of Employment

Store all signed employment contracts and agreements securely, including executive agreements for senior staff.



Employee Management

Keep employment contracts, personnel files, and staff handbooks updated and accessible. Ensure new employees undergo a structured induction process covering key policies.



Holiday & Benefits

Ensure holiday entitlements are clear and tracked, including any variations based on service length. Maintain records of pension agreements, benefits, and any associated brokers.



Probation & Performance Management

Implement formal probation reviews, regular 121 meetings, and performance appraisals. Provide structured processes for performance management and capability concerns.



Training & Development

Ensure managers receive training on key topics, including handling difficult conversations, disciplinary procedures, and diversity. Keep records of first aid and mental health training.



Employee Absence

Track and monitor sickness absences, ensuring return-to-work processes and intervention triggers are in place and managers are trained accordingly.



Health & Wellbeing

Support employee wellbeing with appropriate policies, medical checks, private health insurance, and an Employee Assistance Programme.



Health & Safety

Maintain an up-to-date Health & Safety Policy and ensure compliance with regulations. Track workplace accidents, conduct DSE assessments, and monitor health checks for night workers.

What can Loch do for you?



LOCH | LEGAL

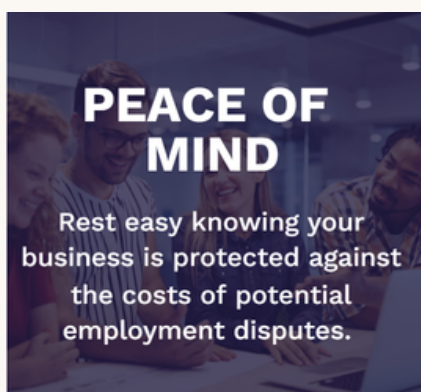
By taking care of your employment, commercial, family and immigration law queries and concerns, Loch will save you significant time and effort, leaving you able to focus on what matters to you in the total confidence that you're in safe hands and that we will find the right solution for you. Our solicitors are as approachable as they are knowledgeable, and will take context into consideration not just a legal standpoint.

LOCH | PEOPLE

People drive performance. Loch's integrated People services connect HR, training and wellbeing with the opportunity to also draw on legal and advisory expertise to protect, grow and future-proof your organisation. We act as an extension of your team, offering proactive, joined-up support across the employee lifecycle to reduce risk, build capability and create lasting business value.

LOCH | ADVISORY

With Loch's business advisory support, ambitious organisations feel supported with strategic, people-focused solutions. Our integrated approach provides commercially focused, pragmatic solutions that help you when you're faced with a decision that will protect, grow, or future-proof. By covering every angle, we give you the confidence to move forward for long-term success.

 PEACE OF MIND Rest easy knowing your business is protected against the costs of potential employment disputes.	 Employment Tribunal Insurance Call us on 0203 667 5400 to find out more	 FINANCIAL PROTECTION Legal battles can be financially draining, but with Employment Tribunal insurance, you're covered.
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How can we help?



As an extension of your team, Loch Associates Group connect the dots between leadership, compliance, people strategy, and business growth when partnering with ambitious organisation leaders to solve complex challenges.

Our integrated approach provides commercially focused, pragmatic solutions that help you when you're faced with a decision that will protect, grow, or secure your future. By covering every angle, we give you the confidence to move forward for long-term success.

Contact Us

Contact us at hello@weareloch.com or 0203 667 5400, and to receive more updates like this, visit our website www.weareloch.com and sign up to our newsletter.



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