

Tool 24B – Job Expectations Handbook

Manager/Owner Setup

Completed by the business owner, founder, or person responsible for setting expectations. Record the business rules, expectations, culture, procedures, and important information new team members need to know. Type the details in each area below.

Role / Job Title:	
Business / Organization:	

Q1

Business / Role Purpose

What is the purpose of this role in the business?

Q2

Daily Responsibilities

Record the key responsibilities and recurring work.

Q3

Opening Duties

Record what needs to happen when work begins.

Q4

Closing Duties

Record what needs to happen before work is finished.

Q5

Safety Rules

Record the safety information relevant to the role or business.

Q6

Dress Code

Record the expectations for appearance and work attire.

Q7

Break Policy

Record the applicable break expectations.

Q8

Lunch Policy

Record the applicable lunch expectations.

Q9

Cell Phone Policy

Record the expectations for personal phone use.

Q10

Customer Service Expectations

Record how customers should be treated and supported.

Q11

Professional Conduct

Record the standards for professional behavior.

Q12

Is fraternization allowed?

Record the business policy or expectations.

Q13

What is acceptable conversation with customers?

Record the boundaries and expectations.

Q14

What should employees do when work is slow?

Record productive activities or instructions.

Q15

Call-off Procedure

Record the correct process for reporting an absence.

Q16

Who should people contact for questions?

Record the appropriate contact person or channel.

Q17

Who should people contact for emergencies?

Record the appropriate emergency contact.

Q18

Chain of Command

Record who reports to whom and who handles different decisions.

Q19

Performance Expectations

Record how good performance is understood or reviewed.

Q20

Common Mistakes

Record common mistakes to watch for.

Q21

Tips for Success

Record practical guidance that helps someone succeed.

Q22

Additional Notes

Record any other important information.
