



BUYING AND USING BUSINESS DOCUMENTS

For businesses that don't have the time, money or expertise to develop business documents, buying commercially available templates is an attractive alternative. This Info Sheet provides information to help you make the right choice of document purchase and get the most out of your investment.

The Importance of Business Documents

In this modern day world of IT systems and virtual clouds, good quality documentation that reflects an organisation's identity and processes is still the backbone of a successful business.

Whether a policy, procedure, guide, plan, work instruction, register, form or template, a well written document that has purpose and makes sense to the reader will help drive business practice and processes.

Accessing Business Documents

For many businesses, developing documents and laying down processes can absorb business time and may require expertise and skills not available within the business.

Many businesses will look to the internet to see what documents other businesses are using and if these could be of use in their systems. Business can also access free to use document templates and purchase from websites selling documents. These can be an invaluable resource, but only if the documents are relevant to the business and adapted to suit business needs. This is where commercially available templates have value.

Buying Business Documents

If you're considering purchasing a document or a set of documents, such as those for a management system, give consideration to the ten areas below.

1. If the document will be used to meet legal obligations ensure the documents are written to reflect the legislation in the jurisdiction (i.e. state or territory) and reference current versions of legislation and associated documents such as codes of practice and standards.
2. Ensure the documents are well designed, practical and easy to use. Well-designed documents can enable efficiency and consistency, but be a stranglehold if poorly designed.
3. Different documents will suit different sizes and types of organisation. Ensure the document provider caters to your size and type of organisation. Small businesses need to be streamlined and nimble to survive; bigger businesses or those undertaking high risk activities may require more detailed processes and evidence of actions taken.



TIPS TO MAKE THE RIGHT CHOICE BUYING & USING BUSINESS DOCUMENTS

TIP #1

Work out what documents you have and what you need

TIP #2

Decide on the best way to develop documents – draft your own or download templates.

TIP #3

If purchasing documents, identify different providers and pick the best to suit your needs

TIP #4

Take the time to update documents to suit your business needs, involve others as needed

TIP #5

Review and update documents and documentation

4. Ensure documents are designed on software that you can use. Microsoft Office (i.e. word, excel, power point) is the most commonly used software. Check the version can be used on your computer.
5. Establish if the documents will be integrated into other business processes or if the documents will integrate with each other. Management is a collective activity and should enable consistency and reduce 'silos' and work duplication.
6. Quality, WHS, environmental, risk and wider business management are interrelated, so try and ensure business documentation are coordinated and connect to each other.
7. Business documentation is an extension of the businesses identity and brand. Documents should be customisable so they look and feel consistent with the business. This means changeable fonts and colours, inclusion of the company logo as well as content that can be amended to reflect business activities and the "way things are done".
8. A document adds no value to a business until it is implemented and in use. Establish what support and guides are available to help with tailoring and putting documents into use.
9. If you are buying business documents with the aim of gaining certification to national or international standards, such as ISO 9001: 2015 (Quality), ISO 14001: 2015 (Environment) and ISO 45001 (OH&S) management systems, ensure the provider confirms the compliance of the documents to the standards. Mapping against the standard is a useful way to demonstrate elements are accounted for.
10. As legislation or standards change and evolve, so will the requirements on your business. Choose a provider that monitors changes, updates products and alerts their customers when changes happen.

Using Business Documents

Once you've purchased your documents, download to your computer or upload to your cloud. It's good to keep the original documents to refer back to them, so if possible make a copy for you to update to suit business needs.

Customise your documents by updating the document style (font, logo, colours etc) and content to suit your business. Consult with and involve others in the updating of documents, particularly those who will use them. Ensure documents are available where needed.

Consider the needs of those who will use documents by ensuring the language and formatting suit your business and end users. Add document control (e.g. version, date of issue and document owner).

All documents will need to be reviewed once put in place, so add a review date and schedule time to ensure the document remains current and meets business practices.

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5 THINGS TO ENSURE GOOD OUTCOMES FOR BUSINESS DOCUMENTS

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2. _____
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