

# Halderstone



Training module

# Policy Management

Design coherent, auditable policy frameworks that align with strategy, scale across entities, and stay current without excess bureaucracy



# Is your policy framework growing faster than you can maintain it?

## Overview

Organisations often accumulate a fragmented set of policies that grow organically, drift out of date, and eventually conflict across different teams or entities.

This module provides a structured approach to governing policies as a controlled system rather than a collection of static documents, ensuring that policy intent remains applicable to daily decisions. It addresses the common frustrations of policy sprawl and unclear ownership by teaching disciplined drafting techniques and robust lifecycle management. Participants leave with the ability to design a coherent policy hierarchy and manage change, exceptions, and harmonisation across multiple entities without creating unnecessary bureaucracy.



## Target audience

- Management system implementers and coordinators
- Executives and department heads accountable for management system performance
- Those responsible for processes, policies, assets, risks, and controls related to a management system
- Auditors seeking insights into management-side best practice (not audit technique)
- Management consultants working with management system design, governance, or improvement

# Is this module for you?

## It is a good fit for you if you...

- are responsible for creating, maintaining, or coordinating policies.
- manage policies across teams, entities, or management systems.
- struggle with uncontrolled policy growth, unclear ownership, or outdated content.
- need policies to be auditable, traceable, and consistently applied.
- want to move from individual documents to a governed policy system.

## It may be less suitable for you if you...

- already operate a lean, well-governed policy landscape with clear ownership and lifecycle management.
- have no mandate or interest in influencing how policies are designed, governed, or used.
- need detailed operational procedures rather than policy-level principles and governance.
- expect ready-made policy solutions without adapting them to organisational context.

# Learning outcomes

## Key outcomes

- Design a policy hierarchy that distinguishes different policy levels while defining clear applicability boundaries
- Draft clear and testable policy statements that express management intent without turning into detailed procedures
- Define workable policy lifecycle roles and approval responsibilities that meet auditable governance expectations

## Additional capabilities

- Operate lifecycle controls for the creation, periodic review, and retirement of policies with full version traceability
- Manage policy exceptions and deviations using structured decision records and defined renewal rules
- Harmonise group-wide policies across multiple entities while allowing for controlled and justified local variation
- Apply structured checks to identify duplicates, conflicts, and outdated wording within the policy set

# Agenda

## **What policy management actually covers**

How policies function as governance instruments rather than operational work instructions, which typical failure patterns undermine policy governance, and what auditors and internal reviewers usually look for in credible policy evidence from a management perspective

## **Policy architecture and levels**

How to structure different policy levels, distinguish organisation-wide, management-system, and topic-specific guidance, define scope and applicability boundaries, and design a policy set that remains navigable as it grows

## **Roles and approvals for the policy lifecycle**

How to define owner, approver, reviewer, and maintainer roles, set pragmatic approval and review expectations, and establish evidence practices that are sufficient but not bureaucratic.

## **Drafting clear, testable policy statements**

How to write policy statements that clearly express obligations, boundaries, and intent, remain testable without prescribing operational steps, and link to supporting procedures, controls, and records

## **Lifecycle control: change, review, and retirement**

How to manage policy creation and change workflows, handle versioning and “current versus superseded” states, and apply retirement and consolidation rules to reduce duplication

## **Exceptions and justified deviations**

How to distinguish legitimate exceptions from signals of policy weakness, define minimum requirements for exception requests and decision records, and manage time limits, renewal, and closure

## **Harmonisation across entities in group structures**

How to balance group-wide minimum requirements with local addenda, address translations and jurisdictional constraints from a governance perspective, and prevent divergence across entities

## **Practical maintenance: keeping policies and guidance usable over time**

How to operate a policy register and review log as living controls, perform lightweight consistency checks across a policy set, and maintain long-term usability as the policy landscape evolves

## **Case-based workshop**

Applying the learned concepts, methods, and approaches in a realistic case setting

# Included materials

## Learning materials

- Slide deck
- Participant workbook

## Templates & tools

- Policy framework
- Policy register
- Group policy hierarchy model
- Policy management process
- Exception handling process
- Exception register
- AI prompt set for policy management

## Confirmation

- Confirmation of participation

# Preparation guidance

## Assumed background

No formal prerequisites. The module assumes general familiarity with how organisations document governance expectations and operate management systems.

Helpful background includes:

- Basic understanding of management system documentation (policies, procedures, records)
- Familiarity with organisational roles and approval practices

## Preparatory modules

### Foundation (depending on background)

Useful if you are new to the underlying concepts

- System Leadership

# Logistics

## Available languages

- English
- German

## Standard delivery options

- Virtual live teaching
- Blended learning (e-learning + live)

## Bespoke delivery options

- On-site delivery at your place
- Content adapted to your organization



# Halderstone

**Halderstone by Langer & Co**

Zürcherstrasse 2

CH-8852 Altendorf

Switzerland

[info@halderstone.com](mailto:info@halderstone.com)

[www.halderstone.com](http://www.halderstone.com)