FlourishDx

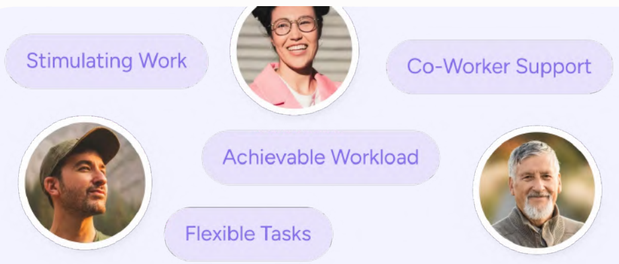
The Ultimate Psychosocial Safety Playbook for HSE and HR Practitioners

2 Oct 2025

FlourishDx

SimplifyPsychosocial Safety at Work

Discover sustainable approaches to psychosocial safety that improve employee mental health, productivity and compliance across all aspects for your organisation.

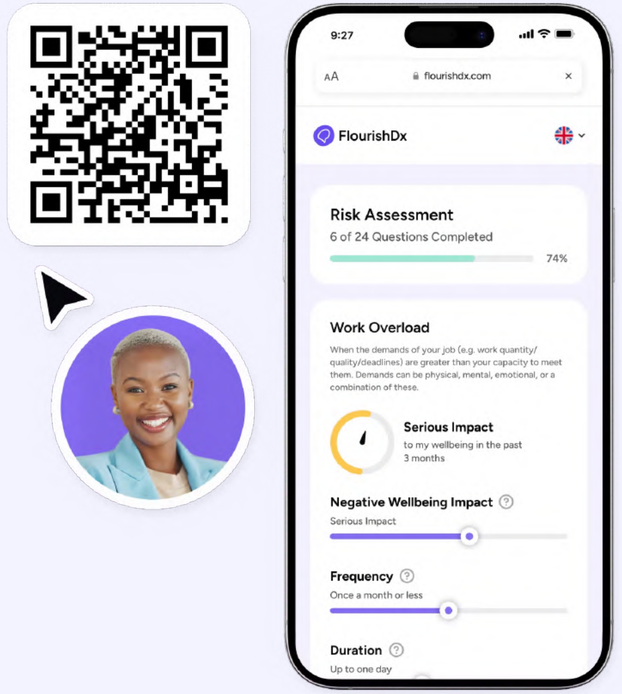


Consulting

Our team of psychologists and human factors experts can guide you through everything you need to maintain mentally healthy work.

Education

FlourishDx is at the forefront of education on psychosocial safety, including the acclaimed ‘Psych Health and Safety Podcast’.



Technology

The FlourishDx platform has all the tools you need to understand and manage psychosocial risks efficiently and at scale.

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FlourishDx Solutions Platform Use Cases Resources Company Pricing Log In Book a Call ↗

Introducing the FlourishDx Psychosocial Safety Playbook

Launching this November, the **FlourishDx Psychosocial Safety Playbook** provides step-by-step guidance to meet legal obligations, reduce risks, and strengthen workplace wellbeing—helping you go beyond compliance and take confident action. Register now to be among the first to access it.

- Practical, sequenced strategies that HR, HSE, and People leaders can put into action straight away
- Step-by-step guidance mapped to the Psychosocial Compliance Maturity Journey
- Tools and templates to measure impact, reduce risks, and strengthen wellbeing
- Insights distilled from years of research and work with leading organisations

First Name

Last Name

Work Email

Job Title

Company Name

Register Now

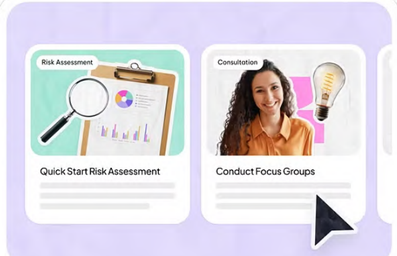
This opportunity is for internal professionals only (HSE, HR, People & Culture, WHS). Registrations will be reviewed and vetted by the FlourishDx team.

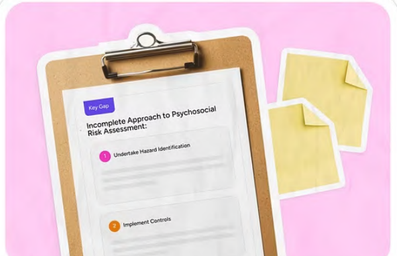
By submitting this form I consent to FlourishDx sending me marketing communication via email. You can opt-out at any time. View FlourishDx's privacy policy.

What to Expect

What You'll Get Inside the Playbook

The **FDx Psychosocial Safety Playbook** distills years of research and hands-on experience into a practical resource for HR, HSE, and people leaders. Inside, you'll find a clear roadmap, actionable tools, and proven strategies to embed psychosocial safety with confidence.





Register for Free Playbook Early Access (mid-Nov)

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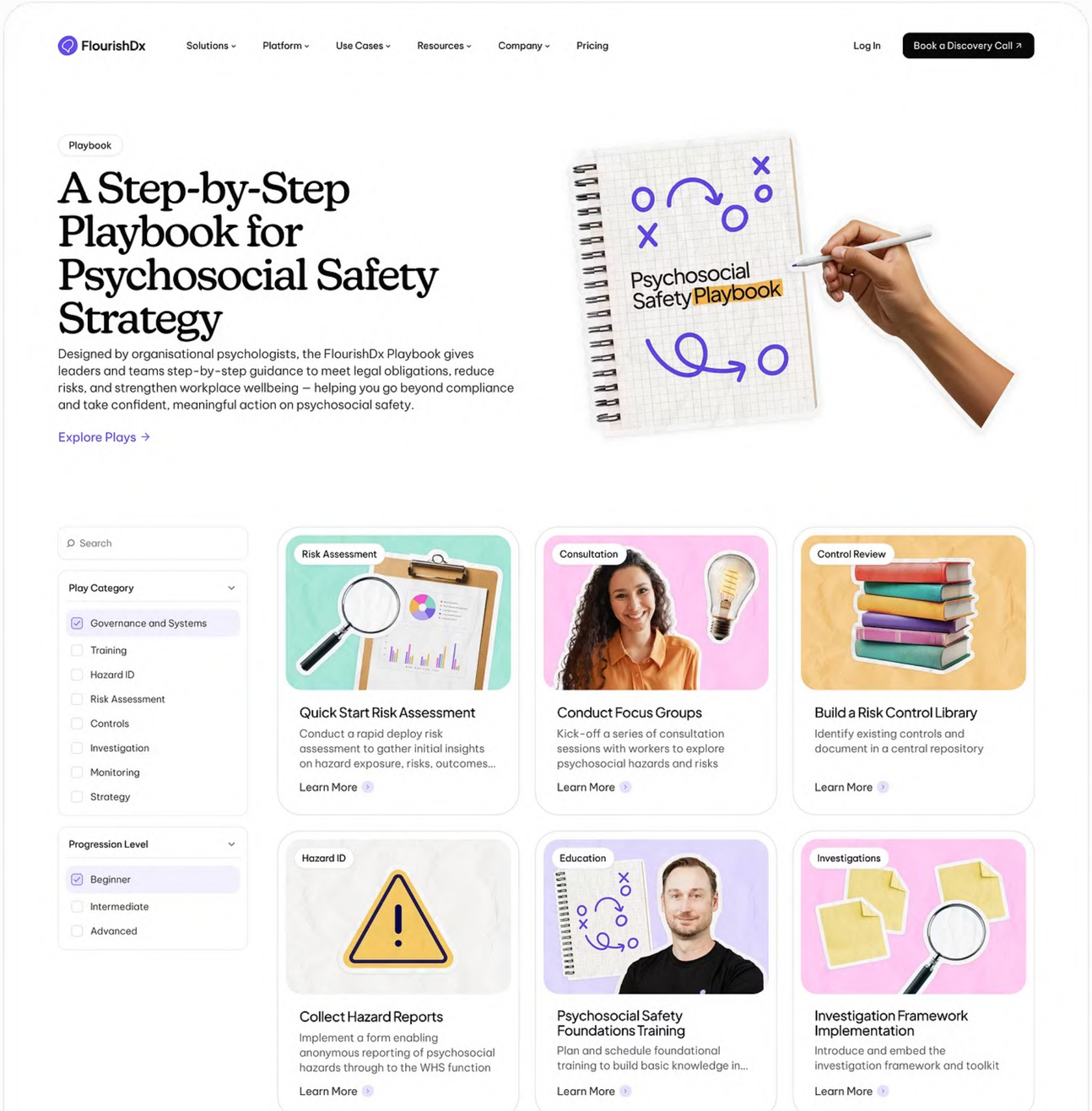

Agenda

- Purpose and explanation of the **FlourishDx Psychosocial Safety Playbook**
- Using the playbook to keep psychosocial safety front of mind amongst other HR, safety or operational priorities
- Spotlight on topical plays:
  - QuickStart Psychosocial Risk Assessment
  - Psychosocial Safety Foundations Training
- Audience Q&A
- Wrap up

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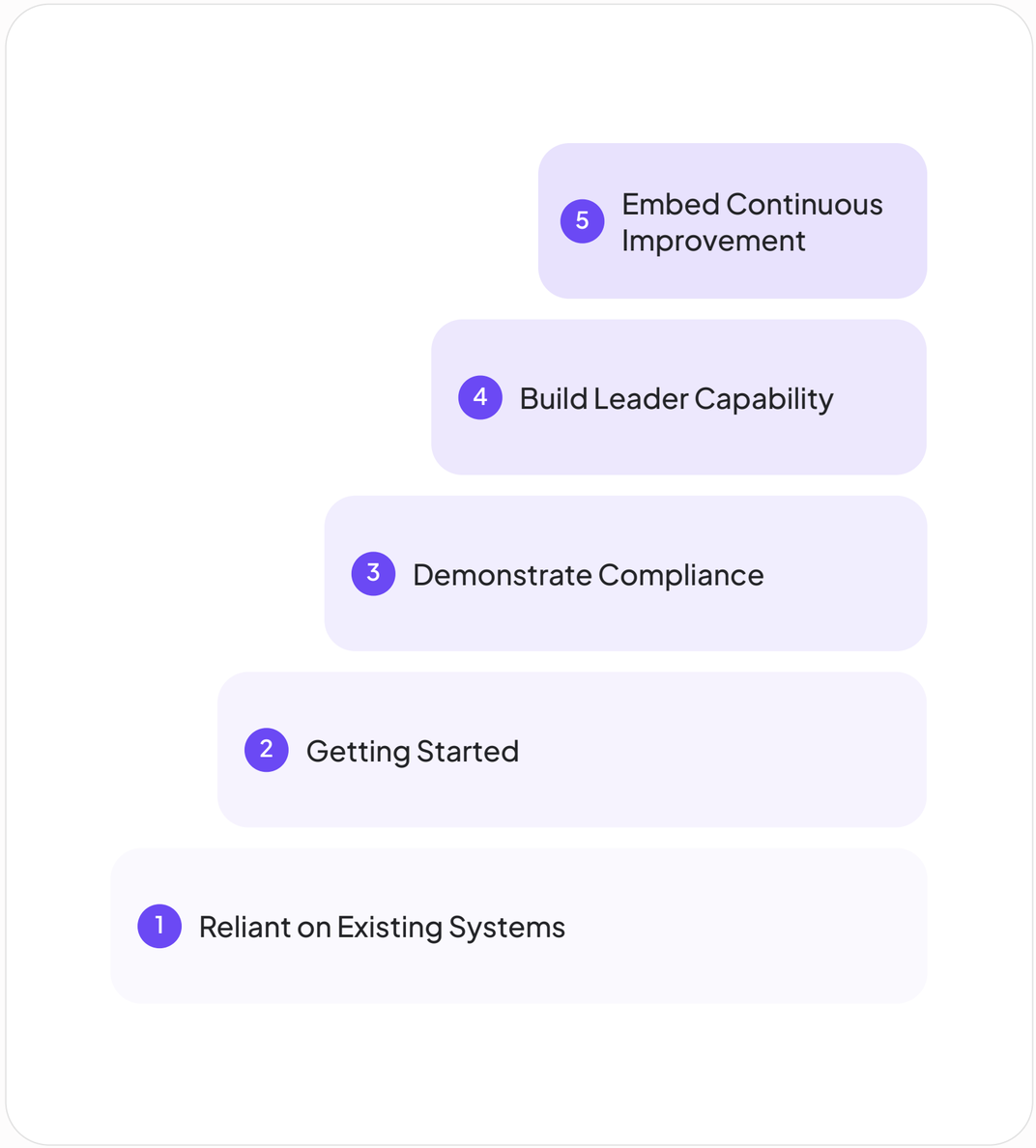
Poll



Purpose of the FlourishDx Psychosocial Safety Playbook

“If you were an internal resource at a company and assigned responsibility for the psychosocial safety strategy what steps would you take to go from nothing in place to embedded and continuously improving?”

Core playbook philosophies:

- Deliver pieces of work well and efficiently
- Demonstrate impact at each step
- Build momentum for the next piece of work

Playbook development Steps:

- Define what ‘excellent’ looks like
- Consider what maturity looks like in stages from 0 to 100
- Define the categories of activities that need to be performed to meet compliance requirements
- Identify the activities required to move up – essentials and nice to haves (the how-to of these activities are called plays)
- Determine the logical sequence of plays

What Does Psychosocial Safety ‘Excellence’ Look Like?

Clarification point – ‘compliance’ is great practice – if you are truly compliant with WHS legislation, including codes of practice, you would likely have a world-class approach to workplace mental health

Note – this is about effective practice that minimises harm (and has positive mental health benefits for workers!) – not zero harm

Defining ‘excellence’

- Psychosocial safety is embedded/integrated in core business and workforce strategy, not just a separate WHS or HR strategy that sits independently
- Senior leaders role model good psychosocial safety and mental health practices, and actively support psychosocial safety initiatives
- Organisations use good data and continuous feedback loops to monitor what’s happening in the workplace and make proactive and timely adjustments
- Accountability for psychosocial safety is distributed across the organisation, driven by objective KPIs and governed by the Board

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Psychosocial Compliance Maturity Journey

Example Indicators

Maturity

1 Reliant on Existing Systems

Summary: No recognition or structured approach to managing psychosocial risks. WHS and HR rely on reactive systems. Mental health is seen as an individual issue.

Role Based Maturity:

- **Executives:** Unaware of legal duties
- **Line Managers:** No training or ownership
- **HR/WHS:** Respond to incidents only, not proactive
- **Board:** No psychosocial safety awareness. Reporting of activities (e.g. EAP utilisation)

Compliance: Does not meet compliance, need to commence uplift of systems and skills. Refer to getting started step.

2 Getting Started

Summary: Awareness is growing. Psychosocial risk concepts appear in some policies. Data used retrospectively. Initial consultation through existing employee surveys (e.g. engagement surveys).

Role Based Maturity:

- **Executives:** Beginning to ask questions
- **Line Managers:** Confused by new expectations
- **HR/WHS:** Leading pilots or risk assessments
- **Board:** Receives basic risk awareness updates

Compliance: Does not meet compliance, need to move to demonstrate compliance stage.

3 Demonstrate Compliance

Summary: Structured psychosocial risk assessments conducted. Central teams lead the response. Minimum compliance with WHS duties can be evidenced.

Role Based Maturity:

- **Executives:** Understand legal liability, support central team
- **Line Managers:** Aware of obligations, limited capability
- **HR/WHS:** Delivering structured interventions
- **Board:** Informed on risk profiles and controls

Compliance: Minimum compliance can be evidenced.

4 Build Leader Capability

Summary: Line managers take responsibility for psychosocial risks. Functional teams enable proactive hazard identification, control implementation, and cultural improvement.

Role Based Maturity:

- **Executives:** Actively sponsor systems and capability
- **Line Managers:** Understand psychosocial risk controls, apply insights
- **HR/WHS:** Trusted advisors, facilitating improvement
- **Board:** Review trends, asks probing questions on system effectiveness

Compliance: minimum compliance can be evidenced, however more may be reasonably practicable in teams.

5 Embed Continuous Improvement

Summary: Psychosocial risk is embedded across systems. Risks are continuously monitored, eliminated or minimised, and workplace culture supports psychosocial health.

Role Based Maturity:

- **Executives:** Steward organisational culture, allocate resources
- **Line Managers:** Confidently lead psychologically safe teams
- **HR/WHS:** Evaluate effectiveness, adapt controls, support leaders
- **Board:** Assured through dashboards, scenario reviews, and audit trails

Compliance: minimum compliance can be evidenced, and risks minimised. Psychosocial risk management done at all levels efficiently.

Example indications only – may vary based on risk and organisational factors

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Defining Categories of PS Compliance ‘Plays’

Categories	Descriptions	Aligns with WHS Act and Regulations obligations
Strategy	The strategy plays underpin all the compliance plays, giving a planned approach to compliance and integration with other operational and workplace mental health/wellbeing initiaitves.	
Governance and Systems	Good governance and safe systems ensure oversight and enable an effective psychosocial risk management system. Follow these plays to understand some of the key steps of this process.	Due diligence officer duties (S.27(5)) and safe systems (S.19(3)(c))
Training	Ensuring the right training is used at the right time is key to a literate and mature approach to psychosocial safety. These plays contain the fundamental learning modules and will be built up with more advanced optional learning. Use these in conjunction with workshops for a blended learning approach.	Information, instruction and training (S.19; Reg 55D (2) (i))
Hazard ID	The first step in psychosocial risk management is to know what hazards are present in your organisation, and where they are. These plays outline different ways hazard identification may be done.	Identify hazards (S.19; Reg 55C(a))
Risk Assessment	Unpacking which hazards are posing a risk, and how much of a risk is an important consideration for controlling those risks. These plays outline how to do different types of risk assessments based on your organisation’s readiness and needs.	Considerations for controls (S.19; Reg 55D (2))
Controls	Controls are established to eliminate or reduce the risk associated with hazards at work. Controls plays guide you through steps to understand what controls are in place, their effectiveness, and where there may be gaps.	Must eliminate or reduce risk (S.19; Reg 55C)
Reporting and Investigation	Incident and hazard reporting processes, and HR reporting processes are often not fit for purpose for compliance with psychosocial obligations. Use these plays to understand and redesign your systems for reporting and investigating psychosocial hazards.	Review and revise risk controls (S.19; Reg 55C)
Monitoring	This play touches on an element of compliance that is often forgotten about - monitoring health and workplace conditions. Follow the plays to understand how to monitor in a safe and effective way.	Monitoring health and workplace conditions for injury prevention (S.19 (3) (g))

Psychosocial Safety Play Sequencing (by Category)

Strategy

- Understand Compliance Requirements
- Consultation Plan
- Psychosocial Safety Gap Analysis
- Develop Your PH&S Strategy
- Roles and Responsibilities
- Gain Exec Endorsement

Governance and Systems

- Reporting on Activity and Lag Indicators
- Board Training
- Incident Reporting
- Risk and Assurance Reporting

Training

- Develop Training Plan
- Psychosocial Safety Management
- Foundations Training
- Controlling Specific Hazards
- Updating and Refresher Training

Hazard ID

- Rapid Hazard Identification
- BYO Data Hazard Review
- Hazard Reporting

Risk Assessment

- Assess Risks Using Existing Data
- Quantitative Risk Assessment
- Qualitative Risk Assessment
- Agile Risk Assessment
- Leader-Owned Risk Assessment

Controls

- Review and Revise Risk Controls
- Control Mapping Workshop
- Create an Action Plan
- Psychosocial Risk Control Framework
- Control Effectiveness Review

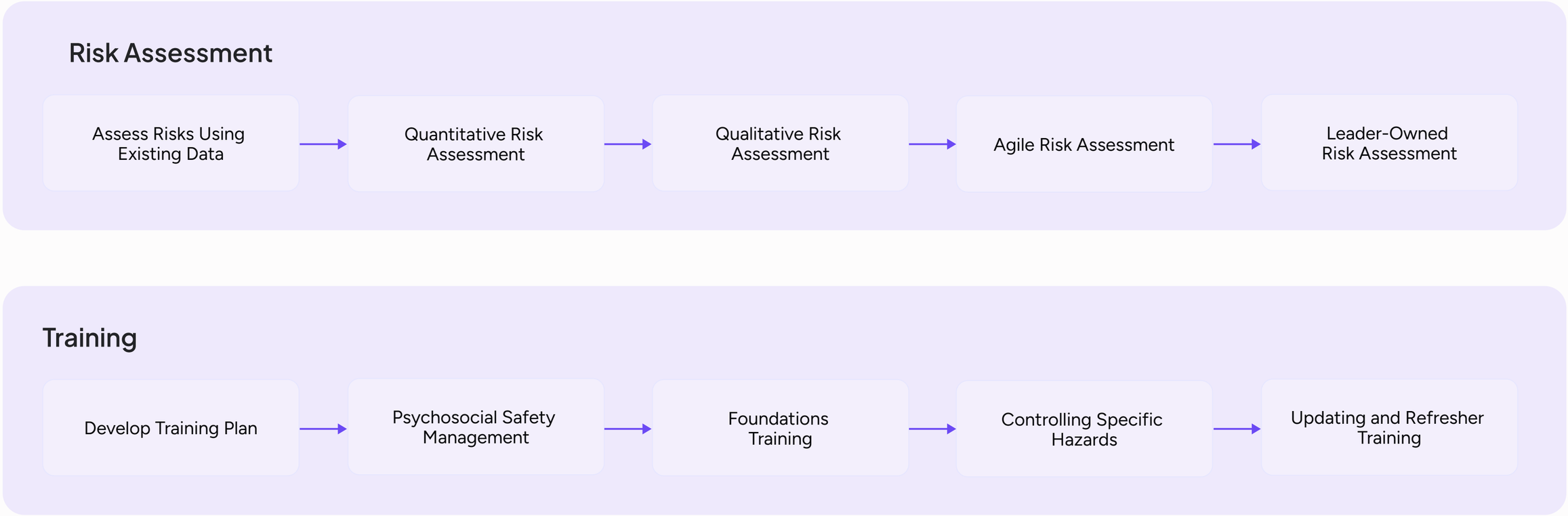
Investigation

- Investigation Procedure Review and Update
- Review Incident Mgmt and Investigations Processes
- Implement Psychosocial Investigation Framework
- Delivering People-Centred HR Processes

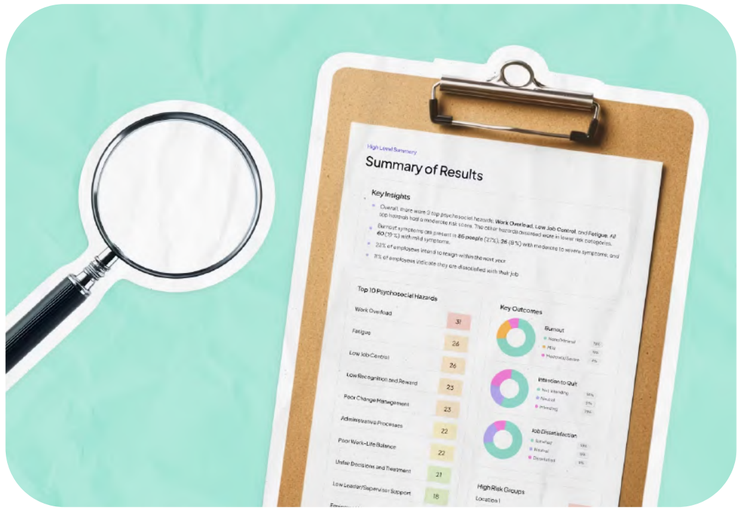
Monitoring

- Injury Data Deep Dive
- Build a Risk Register
- Psychosocial Safety Monitoring Framework
- Develop Data Strategy
- Live Data Dashboard

Example Play Sequencing in Detail

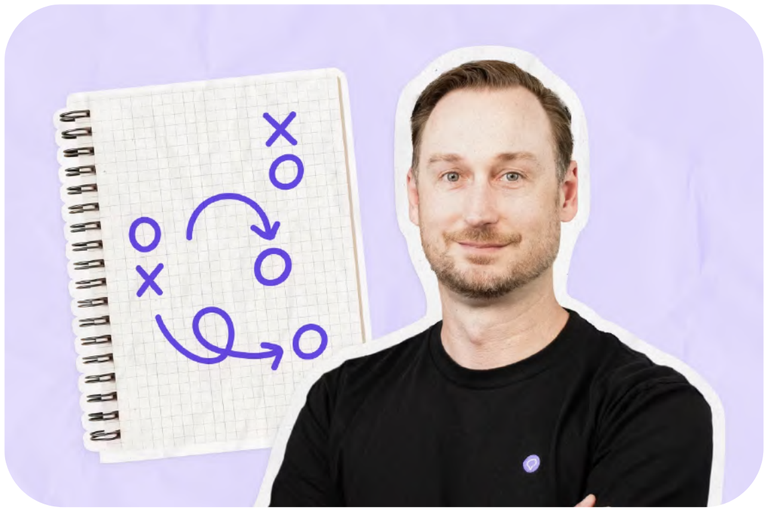


Example Plays



Quick Start Psychosocial Risk Assessment

Conduct a rapid deploy risk assessment to gather initial insights on hazard exposure, risks, outcomes, and hotspots



Psychosocial Safety Foundations Training

Plan and schedule foundational training to build basic knowledge in psychosocial safety

Intermediate | Recommended

QuickStart Psychosocial Risk Assessment

Launch a FlourishDx risk assessment to rapidly acquire insights into hazard exposure, risks, and outcomes.

1. Start gathering insights on psychosocial risk within a matter of days
2. Assess the risk of harm due to exposure to a range of psychosocial hazards
3. Consider individual and business outcomes like burnout, wellbeing, presenteeism, turnover intention, and psychosocial safety climate

Watch Video

Prep Time: 1 Week | Run Time: 4 Weeks | Persons: 2–5 Team Members

Plays to Do Before

- Psychosocial Safety Foundations Training
- Procedure Development

Plays This Unlocks

- Conduct Focus Groups
- Create an Action Plan
- Review & Revise Risk Controls
- Psychosocial Safety Data Strategy

Impact Measurement

- Participation rate
- Completion timeframe
- Attendance at debriefs
- Follow Up Actions
- Perceived Value

About This Play

What Is the QuickStart Risk Assessment?

The QuickStart Psychosocial Risk Assessment is a scalable, quick-to-deploy solution designed to support organisations in meeting legal obligations to assess psychosocial risk. It enables organisations to roll-out a validated psychosocial risk assessment survey to their workforce with minimal time and cost investment to generate data.

The QuickStart Risk Assessment can be run across a whole organisation or deployed to one division or work group. Use this risk assessment approach to quickly establish levels of exposure to a range of relevant psychosocial hazards, understand the hazards that are most likely to lead to harm, identify hotspots within your organisation, note where hazards may be interacting and combining to increase risk, quantify the current likelihood and consequence of harm in a single risk score, and discover trends in worker and organisational outcomes linked to hazard exposure.

When Should You Run the QuickStart Risk Assessment?

This risk assessment is ideal for those seeking to:

- Rapidly assess and quantify psychosocial risks across employee populations.
- Establish a proof of concept before scaling an assessment across a large organisation.
- Rigorously meet WHS legislation and ISO 45003 consultation requirements – including organisations that may be seeking to comply with directions from a regulator.
- Prioritise areas for deeper inquiry or intervention, focusing in on areas of the business that require the most support.
- Establish a foundational view of risk before committing further resources.
- Use data to build a case for further investment in psychosocial safety.

Key Success Factors for Running a Psychosocial Risk Assessment

Visible Leadership Support
A senior leader actively endorses the assessment, reinforcing its importance and building trust across the organisation.

Clear and Consistent Communication
Messaging is simple, transparent, and repeated across multiple channels. Workers understand the purpose, process, and confidentiality protections.

Accessible and Time-Efficient Participation
The assessment is easy to complete (e.g. <10 minutes), easy to access (via QR code or link), and time is allocated during work hours to encourage participation.

Manager Engagement
Managers are briefed and equipped to support their teams, answer questions, and promote participation in a way that feels safe and constructive.

Timely Follow-Up and Action Planning
Results are reviewed promptly, and next steps are communicated clearly. Even small actions or acknowledgements help build credibility and momentum.

Play Instructions

1. Decide to Run the Assessment

Be clear about the need for a psychosocial risk assessment – it will help build a case for using the assessment and clarify your key assessment objectives. It might be part of the establishment of a safe system of work, a response to recent incidents, or to help pinpoint priority areas for risk control review and revision.

2. Confirm Fit

Review available materials and reach out to FlourishDx to ensure the Quick Start Risk Assessment is a good fit for your organisation's needs and expectations. A demo can be provided of how the assessment and reporting works.

3. Secure Sponsorship

Gain endorsement from a senior leader to build trust and visibility. You can learn more through our play on Securing Executive Sponsorship.

4. Nominate a Project Team and Lead

Decide who will manage the project of implementing the risk assessment and who else should be involved in supporting the assessment process. You don't need a large team, but it can help to have 2-5 people involved to drive activities.

5. Complete a Project Kick-Off

FlourishDx will support this process, walking through how to get started and supplying required tools and resources.

6. Set Objectives and Measures of Success

Consider what it would look like if your psychosocial risk assessment deployment is successful – what objectives are you trying to achieve and how will you know if you have met them? Ensure the project sponsor and project team are all in agreement on objectives.

7. Define Scope and Timeframes

Decide when you will run the assessment, which work groups will participate, how long they will have to complete the assessment, and timeframes for follow-up actions.

8. Build Your Risk Assessment

Decide what work factors and outcomes you will assess, ensuring the assessment is customised to better understand hazards that are likely to arise in your organisation. Use the thorough guidance provided by FlourishDx to help you rationalise what to assess, ensuring your risk assessment remains at a manageable length for respondents.

9. Launch Your Communication and Engagement Strategy

Using templates provided, ensure you have briefed stakeholders, shared key messages about the importance of the assessment, and undertaken effective promotion to build engagement and high participation rates.

10. Distribute the Risk Assessment

Using emails, posters, text messages, intranet posts, social streams and other available channels – encourage completion of the assessment. Keep leaders up-to-date on response rates and ensure support in continuing to promote the assessment while it remains open for completion.

11. Debrief Results

Attend a debrief session with FlourishDx to understand key findings and discuss your next steps. Consider the depth of data you will share with stakeholders and what insights they need to drive meaningful action.

12. Communicate Outcomes

Communicate outcomes. Share results with stakeholders and build readiness for the activities that will come next – this might be further assessment and consultation in high risk areas, action planning, control review, or further planning for your psychosocial safety management strategy.

13. Build Momentum

Now you have your psychosocial risk data and a pathway forward, ensure you turn insights into actions, improving outcomes for your workers, organisation, and stakeholders. Be sure to circle back to your success measures and consider how you can continuously improve in meeting objectives.

Play Resources

- Psychosocial Risk Assessment: Frequently Asked Questions
- Comms Template (employees)
- QuickStart Risk Assessment: Plan on a Page
- Comms Template (leaders)

Beginner Essential

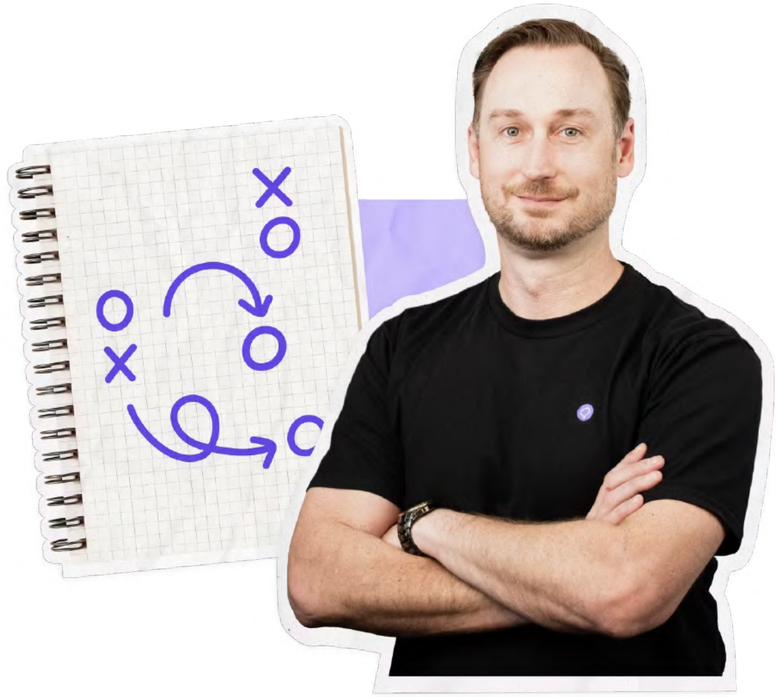
Psychosocial Safety Foundations Training

Use employee-level training early in your psychosocial safety strategy to build common language and detail responsibilities for psychosocial safety.

1. Customise learning objectives and content of training to your context
2. Communicate to stakeholders (e.g. leaders/employees)
3. Deliver training
4. Evaluate training

Watch Video

Prep Time: 1 Week | Delivery: 15–60 min | Target Audience: Employees



Plays to Do Before

- Psychosocial Risk Management Foundations Level 1 (Functional Teams and Stakeholder Working group)
- Procedure Development

Plays This Unlocks

- QuickStart risk assessment
- Harmful behaviours training
- Fatigue management training
- Refresher training

Impact Measurement

- Attendance
- Knowledge test (during/immediate post)
- Participant feedback (immediate post)

About This Play

What is psychosocial safety awareness training?

This training program provides a foundational overview of psychosocial safety in the workplace, beginning with the legal obligations that require employers and leaders to proactively manage psychosocial risks. It outlines key definitions and the risk management framework of identifying, assessing, and controlling psychosocial hazards. The training also explores how to recognise common psychosocial hazards in everyday work scenarios and highlights the need to treat these risks with the same seriousness as physical safety issues. It covers a basic understanding of reporting psychosocial hazards or incidents.

What are the benefits of delivering this training?

When completed, there will be a shared basic understanding of terminology around psychosocial hazards and the risk management obligations. Understanding what psychosocial hazards are and that there is a process for reporting them is an important foundation to implementing any risk management system.

When should you deliver this training?

As an introduction to psychosocial hazards and risks, as part of a core training programme for all leaders and employees, and a shorter more targeted version for the Board and C-Suite.

Variations

- In-person
- Virtual
- On-demand (e-learning)

Play Instructions

1. Determine key learning objectives

This short elearn introduces workers to the concept of psychosocial safety, including the law, and workers' roles in maintaining a mentally healthy workplace. It highlights common psychosocial hazards, the importance of reporting psychosocial hazards, treating psychosocial hazards like physical hazards, and how to report psychosocial hazards so they can be managed effectively. The 30 minute version expands on the 15 minute version, looking at upstanders (active bystanders) and gives examples of scenarios where common hazards may arise. Example learning outcomes are:

15 min version

- Understand the legal obligation to manage psychosocial risks.
- Understand what psychosocial hazards are and how they affect wellbeing.
- Recognise common hazards that might arise in the workplace.
- Understand worker responsibilities for responding to psychosocial hazards in the workplace.
- Understand the importance of reporting hazards early and pathways that can be taken to do so.

30 min version

- Understand legal obligations for psychosocial safety and consequences of non-compliance.
- Know how to identify psychosocial hazards and understand their impact.
- Developed ability to recognise workplace scenarios where common hazards may arise.
- Apply strategies to manage stress
- Contribute to a safe workplace by speaking up and raising concerns when witnessed in the workplace.
- Know when and how to report psychosocial safety concerns.

If you need a guide, FlourishDx has a template here.

2. Develop content (or purchase from FlourishDx)

Choose the format based on the learning intent, audience, and operational constraints:

eLearning is ideal for asynchronous, scalable delivery where learners can progress at their own pace. For eLearning, build each outcome into a discrete section with:

- Short videos or animations
- Interactive scenarios or branching questions
- Knowledge checks to reinforce understanding

Webinars or live presentations are suited to real-time engagement, especially when reflection, discussion, or Q&A is valuable.

- embed each learning outcome into a set of 4–5 slides
- Use speaker notes to ensure consistent delivery across facilitators
- Include prompts for reflection or discussion to deepen engagement

Once the mode is selected:

1. Begin with a **strong opening** that:
   - Frames the topic in relation to organisational goals, values, or strategic priorities
   - Explains why the content matters to the learner's role or context
   - Sets expectations for what will be covered
2. To make **abstract concepts** tangible:
   - Include generic but realistic case studies that reflect common workplace scenarios
   - Avoid referencing actual incidents, but ensure examples are recognisable and relevant across roles
3. Maintain learner attention and support retention by:
   - Including knowledge checks in eLearning (e.g., multiple choice, drag-and-drop, scenario responses)
   - Using reflection prompts in webinars (e.g., "Think of a time when…" or "How might this apply in your team?")
4. Include links to your procedures and policies, and any downloadable documents relating to relevant internal documents or roles and responsibilities.

5. For repeatable delivery:
    - Standardise speaker notes and slide decks for webinars
    - Use templates and style guides for eLearning modules
    - Pilot content with a small group to test clarity, relevance, and usability

3. Communicate with leaders

Before launching any workplace training—especially in areas related to psychosocial risk—it is essential to prepare leaders with the right context. This step is not just logistical; it's strategic. Leaders who understand the purpose and scope of the training are better positioned to support their teams, manage expectations, and foster a psychologically safe learning environment.

1. Communicate the Purpose and Relevance
2. Address Potential Concerns Proactively
3. Equip Leaders to Support Their Teams
4. Reinforce the Role of Leadership in Learning Culture

See downloadable communication guide for more detailed information.

4. Schedule Training

Making time for the training will likely go hand in hand with the decision around mode of delivery. eLearns are flexible and don't require groups of people to be available at the same time, but webinars may mean that completion rates can be increased quickly. Some steps to consider are:

1. Confirm training type (elearning or webinar)
2. Coordinate with facilitators and book venues/platforms
3. Schedule sessions to minimize operational disruption
4. Add sessions to shared calendars and notify relevant teams
5. Ensure accessibility (e.g. captions, screen reader compatibility)

5. Communicate with participants

(e.g. employees) in a way that is familiar to them, aligning with your usual methods of communication. Consider multiple modes if possible, repeating the message in case one mode isn't effective. Reminders can increase the participation rate as well.

1. Send invitations with:
    - Date, time, location/link
    - Purpose and relevance of training
    - Any pre-reading or expectations
2. Use multiple channels (email, intranet, team meetings)
3. Send reminders 1 week and 1 day prior
4. Provide contact info for accessibility or support needs

6. Deliver training

Managing the training process is just as important as delivery to ensure that the training goes smoothly.

1. Ensure tech and materials are ready
2. Welcome participants and confirm attendance
3. Support facilitator (e.g. timekeeping, troubleshooting)
4. Monitor engagement and note any issues
5. Collect feedback forms if distributed during session

7. Evaluate Training

Once the training has been delivered, feedback helps to refine content to ensure it has the required outcome.

1. Use post-training surveys to assess:
    - Relevance and clarity of content

- Confidence in applying knowledge
- Suggestions for improvement

2. Compile and analyse feedback
3. Share summary with stakeholders
4. Recommend updates to content or delivery based on findings
5. Consider follow-up interviews or focus groups for deeper insights

8. Save attendance records

It is important to make note of who attended which session so that you can track learning needs and completion for compliance. Consider the following when setting up your system:

1. Use a standard format (e.g. Excel, LMS export)
2. Document who was present, noting:
    - Full name, job title, department
    - Date, training title, facilitator
3. Save securely in designated folder/system
4. Ensure compliance with privacy policies
5. Flag non-attendees for follow-up or rescheduling

9. Schedule refresher training

Once the training has been completed, knowledge needs to be consolidated and built upon. Decide if you want to have an annual refresher program following this initial training, or if you want to progress through the core training to evidence ongoing learning.

1. Check regulatory or internal policy for refresher intervals (e.g. annually)
2. Review attendance records to identify who needs refresher
3. Update content to reflect any regulatory changes or feedback
4. Schedule and communicate as per initial training steps
5. Track completion and update records

Play Resources

- Sample Overview and Learning Objectives
- Comms Template (employees)
- Pros and Cons of Different delivery methods
- Attendance Template
- Comms Template (leaders)
- Training Evaluation Template

Summary

- Psychosocial safety compliance is excellent practice.
- Chunking down activities into logical sequences is a good way to make projects manageable, demonstrate impact to executives, and build momentum and interest for other necessary activities.
- Many psychosocial safety strategies fail due to taking too long to execute (losing the interest of stakeholders), or not linking quickly to the logical next step.
- The FlourishDx psychosocial safety playbook addresses these issues and will be made available for free access to internal professional from mid-November,

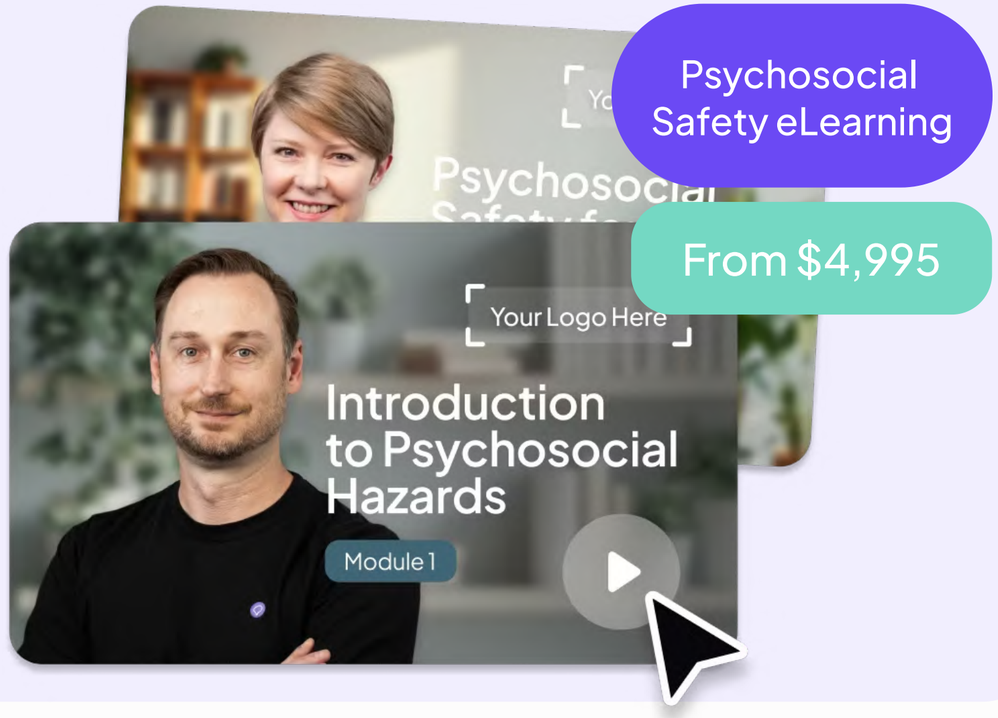
Get in touch with FlourishDx

Book a Discovery Call

Q&A

Poll

Don’t Wait for Playbook Access– Get Your Training and QuickStart Risk Assessment Completed Before Christmas!



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