

MANAGER'S GUIDE

MANAGING THE PROBATIONARY PERIOD

Successfully managing an employee's probationary period is critical to ensuring a smooth onboarding process and assessing suitability for the role. However, not all new recruits will manage to successfully complete their probationary period, either because they feel the job is not right for them or because they do not have the right skill set and aptitude or because of issues regarding their conduct.

Nevertheless, there is still a procedure which needs to be followed. Sometimes new employees leave due to a lack of understanding of what is expected of them in their probationary period and if there are areas of concern regarding their performance, then this should be addressed as soon as is reasonably practicable. The best way to avoid this happening is to keep an open channel of communication with new employees where possible, as well as ensuring that the mid probationary meeting is held.

If an employee is not meeting the manager's expectations then it is important to sit down with them after they have been in their role for half the probationary period, or before if you have serious concerns regarding their performance, this will give you the opportunity to reiterate your expectations and to consider any training which may be necessary in order for them to meet these expectations.

The probationary period is heavily legislated and therefore you need to have a clear policy in place and adhere to it for the successful management of new employees.

This guide provides practical advice for managers to effectively support and evaluate employees during their probation.

Purpose of the Probationary Period

The probationary period is a structured time to:

- Evaluate the employee's performance, conduct, and suitability for the role.
- Identify any training or support required.
- Provide feedback and guidance to set the employee up for success.

Key Responsibilities for Managers

As a manager, your role includes:

- Setting clear expectations from the outset.
- Providing ongoing support and feedback.
- Documenting progress and maintaining open communication.
- Making fair and evidence-based decisions about the outcome of the probation.
- Confirm in writing at the end of the probationary period the outcome, positive or termination.

Managing the Probationary Period

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Day 1: Initial Meeting

- Discuss the employee's role, objectives, and expectations.
- Explain the probationary process and review timelines.
- Identify any initial training or support needs.
- Complete the **Day 1 section** of the Probationary Period Review Form.

Regular Check-Ins

- Hold informal one-to-one meetings to provide feedback and discuss progress.
- Address any concerns early to prevent issues from escalating.

Formal Reviews

Schedule formal reviews at the following stages:

- **Month 1:** Discuss initial progress, address challenges, and provide feedback.
- **Month 3:** Conduct a mid-probation review to assess performance against objectives.
- **Month 5:** Summarise progress and decide on the next steps.

Documentation

Use the **Probationary Period Review Form** to record key points and agreed actions at each stage.

Providing Feedback

- **Be Specific:** Focus on clear examples of performance and behaviour.
- **Balance Feedback:** Acknowledge successes while addressing areas for improvement.
- **Be Constructive:** Provide actionable advice and agree on next steps.
- **Check Understanding:** Ensure the employee knows what is expected of them going forward.

Supporting the Employee

- Offer training or resources to address skills gaps.
- Encourage open communication and invite the employee to share any concerns.
- Adjust objectives if needed to ensure they remain realistic and achievable.

Making a Decision at the End of the Probation

At the end of the probationary period, a decision will be made regarding the new starter's continued employment based on their performance and behaviour during this time. This assessment will determine whether they have met the required standards and are suitable to transition into a permanent role, or if further action is needed. The outcome **MUST** be confirmed in writing whichever outcome is decided as appropriate. If you don't the probationary period is deemed to have continued.

Confirming Employment

If the employee meets or exceeds expectations:

- Confirm their employment in writing.

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- Congratulate them and outline next steps for their ongoing development.

Extending Probation

If more time is needed:

- Provide clear reasons for the extension.
- Set measurable objectives and agree on a new review date.
- Confirm the extension in writing.
- Only use an extension once.

Terminating Employment

If the employee is unsuitable for the role:

- Hold a formal meeting to discuss your decision.
- Provide written confirmation, adhering to the notice period stated in their contract.
- Ensure you handle the process sensitively and in line with employment law.

Tips for Success

- **Plan Ahead:** Schedule review dates and stick to them.
- **Communicate Openly:** Foster an environment of trust and support.
- **Be Fair and Objective:** Base decisions on evidence, not assumptions.
- **Document Everything:** Keep clear records of discussions and actions.

Use of the Probationary Period Review Form

The **Probationary Period Review Form** (is a key tool to track progress, record feedback, and agree on actions. Ensure it is completed accurately at each review stage:

- **Day 1:** Objectives and expectations.
- **Month 1:** Initial review.
- **Month 3:** Mid-probation review.
- **Month 5:** Final review.

Additional Support

Always refer to the Probationary Policy for further details. If you need advice on managing an employee's probation, contact the team at Go HR for guidance.

By following this guide, you can effectively manage probationary periods, ensuring a fair and supportive process for both employees and the business.