



Managers Guide: Managing Probationary Periods

Introduction

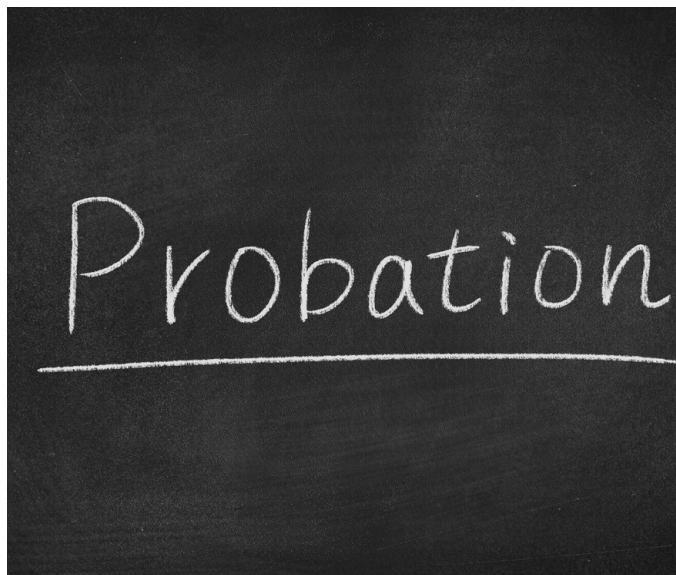
The probationary period is a critical phase for evaluating whether a new hire meets the job's requirements. To ensure clarity and success for both parties, it's important to:

- Monitor performance through regular check-ins.
- Address issues promptly as they arise.
- Provide consistent and constructive feedback.
- Offer guidance and supervision.
- Deliver essential training and mentorship.

Proper planning ensures the employee understands expectations, such as:

- Performance standards and evaluation metrics.
- Specific goals to achieve during the probation.
- Development initiatives.
- Behavioral expectations in interactions with colleagues and clients.

A well-documented training schedule is essential, covering role-specific tasks, workplace policies, and relevant skills like IT competency or product knowledge.



Conducting Progress Reviews

Frequent reviews during the probation period help track performance and identify areas for improvement. Aim to hold three review meetings evenly spaced across the period, ideally at the end of month 1, month 3 and month 6.

Key Steps for Reviews:

1. Praise achievements and highlight strengths.
2. Clearly outline areas needing improvement, with specific examples.
3. Discuss reasons behind any challenges.
4. Agree on training or support to address gaps.
5. Cover additional topics like punctuality, attendance, and workplace attitude.
6. Encourage open dialogue about concerns or suggestions.

Create action plans at each review's conclusion to clarify next steps, responsibilities, and timelines. Use these plans to ensure continued monitoring

Tips for Effective Communication:

- Use fact-based feedback and avoid personal judgments.
- Be specific about expectations and offer clear examples.
- Ask open-ended questions and listen actively.
- Maintain a constructive tone and use positive language.
- Ensure mutual understanding by summarizing key points.

Final Review and Beyond

The final review marks the probation's conclusion. It's an opportunity to:

- Address any ongoing training or development needs.
- Discuss the employee's overall experience.
- Outline future performance expectations.

If the employee has met expectations, confirm their permanent appointment in writing. Failing to hold this meeting on time may inadvertently confirm their position by default.

Extending the Probation Period

If performance concerns remain at the probation's end or circumstances such as significant absences have affected progress, an extension may be necessary. Define the terms of the extension in writing, specifying:

- The extension's duration and new end date.
- The reasons for the extension.
- Required performance improvements and any additional support.

Avoid extending probation more than once and ensure extensions are reasonable in length.

Employment Terms During Probation

While probationary periods do not affect statutory rights, some contractual benefits may begin only after probation. Define shorter notice periods for this stage if permissible, ensuring compliance with legal minimums.

Promotions, Transfers, and Probation

When employees move to new roles with significantly different responsibilities, a probationary period may also apply. Their continuous service record remains unaffected. If the employee fails to meet the new role's standards, termination or reassignment may be considered.

Handling Unsatisfactory Performance

If performance issues persist despite adequate support, termination might be necessary. Early termination can be considered for clear cases of incompatibility. Explore alternate roles within the organization before proceeding with dismissal, ensuring mutual agreement on any changes.

Get in touch

This document is intended as a guide. If you have any concerns regarding its content, or for further information about managing probationary periods, or anything else to help make managing your HR easier then please get in touch. We'd love to help.

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Simply contact our team on



www.breedonconsulting.co.uk



01530 447 441



info@breedonconsulting.co.uk