

Probation Meeting Template

Objective

Every workplace is different, and employees work much better when they are clear on expectations. It is unreasonable to expect that a transition into a new role will go brilliantly. People are a product of their previous environment, so what may have been common practice in another environment, may not be here at <insert Company Name here>

The objective of monthly reviews during the Probationary Review period is to keep communication flowing and address any concerns, teething problems, training or accountability issues and provide clarity on priorities, early rather than leaving everything to the end of the three month probationary period.

Employees will feel more positive and focused about their contribution – this leads to a happier, more settled employee and a productive workplace.

Purpose

The purpose of this meeting is for the employee and the Manager to discuss the past weeks and highlight any areas that may need to be addressed as well as where the employee is performing well.

Typical examples are:

- Planning – or lack of
- Communication
- Positive attitude
- Work load
- Expectations and deliverables
- Training
- Retention
- Presentation
- Follow through
- Attention to detail
- Adherence to Deadlines

The employee will have an opportunity to communicate how they feel they are performing within the guidelines given for the role. We will discuss what areas are enjoyed, what areas if any, are proving difficult, expectations and accountability. This is also an opportune time for the team member to articulate whether the role is as depicted during the interview process.

The Manager will then give feedback on how the team member is performing to our expectations and document Action Plans if required.

Suggested Format

- Book a time and advise the Team Member of the meeting and the purpose. Allow approximately 30-45 minutes.
- Clarify their perception on the accuracy of the depiction of the role, during the interview process. "Is the role as we depicted?"
- Invite candidate to talk about their role covering the above, talk about issues they may have and any improvements that they have made.
(Document issues or concerns raised and come back to them at the close.)
- Manager gives feedback on performance.
(Highlight any relevant issues with examples if possible)
- Discuss issues raised
(Document specific action or outcome)
- Discuss appropriate training, retraining, refocus and appropriate timelines. The Team member will receive a copy of documented Action Plan.
- It is important to include expected milestones against each responsibility in the Job Description for the probation period.
- Advise an appropriate date to revisit the above and review the next month.
- End positively

Document Action Plan and ensure Employee receives a copy within two working days of the meeting.

Probation Meeting Template

Employee Name: (Insert employee name here)

Meeting date and time: (Insert meeting date & time here)

Is the role as expected/portrayed?
Does the employee have any issues?
What performance improvements has the employee made? (from their perspective)
Explain to employee what they are doing well in and any issues that need to be addressed
What actions can be taken to address issues identified?
Next meeting

Action Plan

What (needs to be done)	Who (is responsible)	How (will it be done)	Why (what is the reason)	When (does it need to be done)	Where (will it occur)