



Navigating Probationary Periods Effectively

What is a probation period?

A probation period serves as a crucial evaluation phase for both employers and new employees. It's a time in which both parties can evaluate the other for the suitability of the role and each other.

Not only do they provide an opportunity to assess suitability, but it's also a time to address any performance gaps, and ensure a successful transition into the workplace. Here's a guide to navigating probationary periods effectively:

Significance of Structured Processes and Documentation

Establish clear expectations

Clearly define performance expectations, goals, and milestones for the probationary period. Ensure the employee understands the standards against which they will be assessed.



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Regular feedback and documentation

Provide regular feedback to the employee throughout the probationary period. Document performance observations, both positive and areas for improvement, to maintain a clear record.

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Formal probation review meetings

Conduct formal probation review meetings at predetermined intervals to discuss progress, address any concerns, and provide guidance for improvement.



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Transparent communication

Communicate openly and transparently with the employee throughout the probationary period. Address any performance issues promptly and constructively.

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How long should a probationary period last?

- **Appropriate length:** Determine an appropriate probationary period length based on the complexity of the role and the time required for a fair assessment. Typical probationary periods range from three to six months.
- **Consideration of factors:** Consider factors such as the employee's experience, the complexity of the role, and the organisation's culture when determining the probationary period length.
- **Extension if needed:** If the employee requires additional time to demonstrate their capabilities, consider extending the probationary period with clear communication and justification. However, it is recommended that before you do this, you consult with a HR professional (like us) to ensure the best way in doing this.

Training and Improvement During Probation

- **Onboarding and Training:** Provide comprehensive onboarding and training to familiarise the employee with their role, company policies, and expectations.
- **Mentorship and Support:** Assign a mentor or colleague to provide guidance, support, and regular feedback to the employee during the probationary period.
- **Opportunities for Improvement:** Identify areas where the employee can improve and provide targeted training or coaching to address any skill gaps or performance issues.

Addressing Challenging Conversations

- **Constructive Feedback:** Approach challenging conversations with a focus on constructive feedback and improvement rather than criticism.
- **Specific Examples:** Provide specific examples of performance issues or areas of concern to help the employee understand the areas that need improvement.
- **Collaborative Approach:** Engage in a collaborative discussion with the employee to identify solutions and create an action plan for improvement.

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Probation Review Process

Establish a formal process

Develop a formal probation review process with clearly defined timelines, evaluation criteria, and documentation requirements. We recommended that this is done over months 1,3 and 5 so that you have sufficient time to make decisions about the employee's suitability moving forward.



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Involve relevant stakeholders

Include the employee's direct Manager and any other relevant stakeholders in the probation review process. This might mean that the process involves the direct Manager, but the wider organisational leadership team are informed of the progress of the Employee.

Transparent communication

Communicate the probation review process clearly to the employee, including the evaluation criteria, timelines, and potential outcomes. Involve them in the process, so they know what is expected of them and when.



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Effectively managing probationary periods requires a structured approach that combines clear expectations, regular feedback, and opportunities for improvement.

By following these guidelines, organisations can ensure a fair and transparent evaluation process that sets new employees up for success and contributes to a positive workplace culture.

Need advice when it comes to probation periods, or want tailor-made processes for your business? We can help.

Contact Us

