

Probation Review Template

Making the right hiring decisions doesn't end with the offer letter — training and evaluating new employees' during their probationary period requires time, intention, and attention to detail throughout the onboarding experience. After a few months in the role, it's crucial (and legally required) to have a manager touch base with new hires to assess their fitness for the role.

Probationary reviews are designed to assess whether the new hire is still the right fit for their team. Supporting managers with these probationary reviews starts with providing a framework for their review, and resources for completing them. It's also a touch point for gathering feedback from employees on their perspective, including their experience on the team, whether the role is what they expected it to be, and what they need in order to succeed.

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Collaboration	72	84	88	98	84
Feeling valued	84	81	88	55	35
Team culture	70	80	98	80	81
Management	55	35	72	72	72
Commitment	84	72	98	80	70

Lattice APP
Public praise was submitted in Lattice
Adrian received public praise from Luc!
You handled that tough customer conversation today like a PRO! So glad to have you on the team!

First Month Review

1. **Performance feedback:** outline how the employee is meeting or exceeding expectations.

2. **Employee feedback:** learn their initial thoughts on the role, performance and growth opportunities, team and culture, etc.

3. **Areas for improvement:** identify competencies or skills that could be improved.

4. **Plans for improvement:** provide training and opportunities for the employee to grow.

5. **Objectives for the midpoint review:** discuss and document how performance will be measured between now and the next review.

Midpoint Review

1. **Performance feedback:** outline how the employee is meeting or exceeding expectations so far.

2. **Employee feedback:** ask for their thoughts on the role, performance and growth opportunities, team and culture, etc.

3. **Improvement progress:** discuss how the employee is adjusting to the role and demonstrating growth.

	Poor	Fair	Good	Excellent	Improved
Competency 1					Y/N
Competency 2					Y/N
Competency 3					Y/N
Competency 4					Y/N
Competency 5					Y/N

4. **Plans for improvement:** provide training and opportunities for continued growth.

5. **Objectives for final review:** establish how performance will be measured in the final review.

Final Month Review

1. **Performance feedback:** outline how the employee met or exceeded expectations.

2. **Employee feedback:** ask for their thoughts on the role, performance and growth opportunities, team and culture, etc.

3. **Probationary assessment:**

- Is the employee to be confirmed in their role?
 - Yes:** Send the employee a confirmation letter.
 - No:** Document why the employee is not confirmed.

- Is the probationary period to be extended?
 - Yes:** Extension will conclude on _____ .
 - No**

Next Steps

To support employees who are confirmed in their role, managers should outline what to expect for the next months based on the discussion and agreements set in the probationary period.

1. Amendments to the job description:

2. Objectives for the next review period:

3. Training or learning & development needs:

4. Meeting cadence for manager-employee 1:1s: