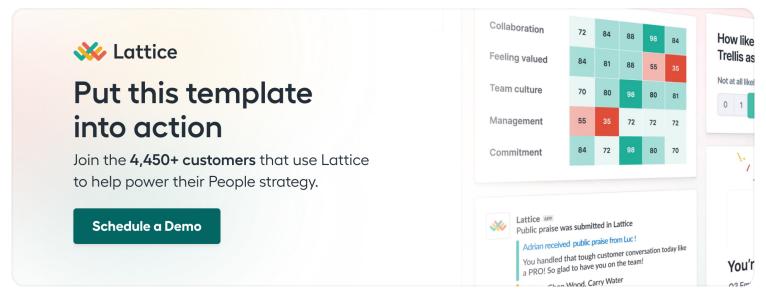
Probation Review Template

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.



First Month Review

	rmance feedback: outline how the employee is meeting or ding expectations.
_	yee feedback: learn their initial thoughts on the role, rmance and growth opportunities, team and culture, etc.
	for improvement: identify competencies or skills that could proved.
	for improvement: provide training and opportunities for the byee to grow.
_	etives for the midpoint review: discuss and document how rmance will be measured between now and the next review.
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Midpoint Review

Competency 1 Competency 2 Y/N Competency 3 Y/N Competency 4	Performance feet exceeding expec			the emplo	oyee is mee	eting or
the role and demonstrating growth. Poor Fair Good Excellent Improvement: provide training and opportunities for				•		e, etc.
the role and demonstrating growth. Poor Fair Good Excellent Improvement: provide training and opportunities for						
Competency 1 Competency 2 Competency 3 Competency 4 Competency 5 Plans for improvement: provide training and opportunities for	-	•		the emplo	oyee is adju	ısting to
Competency 2 Competency 3 Competency 4 Competency 5 Plans for improvement: provide training and opportunities for		Poor	Fair	Good	Excellent	Improved
Competency 3 Competency 4 Competency 5 Y/N Y/N Y/N Plans for improvement: provide training and opportunities for	Competency 1					Y/N
Competency 4 Competency 5 Y/N Plans for improvement: provide training and opportunities for	Competency 2					Y/N
Competency 5 Y/N Plans for improvement: provide training and opportunities for	Competency 3					Y/N
Plans for improvement: provide training and opportunities for	Competency 4					Y/N
	Competency 5					Y/N
		-	ovide train	ing and o	pportunitie	s for

-	Objectives for final review: establish how performance will be measured in the final review.				
Final	Month Review				
	rmance feedback: outline how the employee met or eded expectations.				
-	byee feedback: ask for their thoughts on the role, rmance and growth opportunities, team and culture, etc.				
S. Probo	ationary assessment:				
• Is th	ne employee to be confirmed in their role?				
	Yes : Send the employee a confirmation letter.				
	No: Document why the employee is not confirmed.				
• Is th	ne 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.

	Amendments to the job description:
2.	Objectives for the next review period:
5 .	Training or learning & development needs:
4 .	Meeting cadence for manager-employee 1:1s: