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Probation: the manager's how-to guide



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Any questions?



The what

Probation is the starting point of an employee's journey with you. It's not a tick-box exercise. It's not a quiet assessment happening in the background. And, it's definitely not a test to catch people out. It should be a structured way to set new joiners up for success.

It's a defined period of time where you focus on three things: clarity, support, and confidence.

- **Clarity:** what looks good, or great in the role, the expectations, priorities and goals that will be measured, the 'what's expected of you in your role?'
- **Support:** through regular check-ins, feedback, and space to learn and ask the stupid questions.
- **Confidence:** for both you and the employee to ensure it's the right fit. This is a two-way street, so it's an opportunity for an employee to test the company too.

Sanity check your current probation period and ensure it's long enough (and not too long!) to assess someone within the role. Standard probation periods are three, four, or six months. With the changing legislation, we recommend moving to a three- or four-month probation period to give yourself enough time to manage this effectively.

Probation isn't just about someone proving themselves. It's about your company showing up as a great place to work, with strong leadership, clear direction, and no surprises.



The why

Because great people don't thrive or grow by accident. Plus, additional employment legislation changes are rapidly approaching in January 2027 (and, don't forget, this applies to anyone joining your team from July 2026). After six months' service, employees have unfair dismissal rights. Hiring and helping someone settle into the business well, and regularly checking in on performance and behaviours, becomes even more imperative to avoid costly mistakes – and potential employment claims.

The first few months in a role shape everything: performance, confidence, relationships, and whether someone feels they have a future at the company. Get it right and you build momentum fast – get it wrong and you're playing catch-up and losing money (and people) before you've really begun.

Probation exists to make those early months count. It gives a clear focus: how we work, what we expect, and what success looks like without people having to join the dots up themselves.

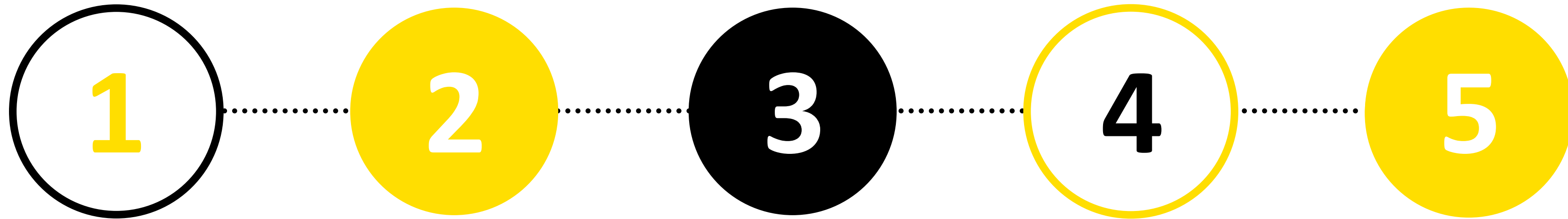
Plus, it keeps managers accountable. If someone's struggling, it's not just a performance issue – it's a support question. What could we have done better to help them settle and thrive?





The probation roadmap

Your five-step guide to a brilliant probation process (and employee experience)



Month 1

- Thoughtful induction – introductions that go beyond job titles.
- Set clear role expectations – this means what success looks like, not just tasks.
- Set early wins to build confidence.
- Regular informal check-ins.
- Set clear goals and objectives.

Month 2

- Ensure they can own pieces of work independently.
- Stretch them slightly beyond their comfort zone, with support.
- Keep feeding back – both positive and constructive feedback.
- Identify gaps you're seeing (skills, confidence, knowledge).
- By the end, they should be delivering meaningful work with less support.

Mid-probation

- Hold a formal mid-probation check-in – a mini probation review with two-way feedback.
- Let's get honest: what's going well? Where do we need more help? What support do they need?
- Review the expectations set – are they on track for a successful probation? If not, what do they still need to work on?
- Set yourself up to ensure no surprises at the end!

Mid-to-end probation

- Keep up the feedback. Reflect on strengths and development areas through ongoing feedback.
- Keep tracking against the probation goals set.
- **Two weeks before probation review:** are we on track? Any concerns that need addressing? Get prepared.

Probation review

Give a clear conclusion. Either:

- Confirm success
- Extend with purpose and clarity
- Exit clearly and respectfully

Give clear follow-up steps if extending. Spell out what they need to do, and by when, to be successful.

5 tips to help create a great probation process



Setting expectations

Clarity IS kindness. Vagueness is where problems go to multiply. Good expectation setting isn't about being rigid. It's about giving people something to aim for so they can actually succeed.

Why it matters

When expectations are clear, people move faster, make decisions independently, feel safer asking for help, and build trust quickly.

What 'clear expectations' actually means

1. **Outcomes:** what does success look like? What impact should their work have, and how will they know when it's working?
2. **Priorities:** what are the top two or three priorities this month? What can wait, and where should they focus their energy?
3. **Standards:** what level of quality do we expect? How polished should outputs be? How fast and often do we iterate, and what does 'done' really mean here?
4. **Ways of working:** how often do we check in? What's our preferred communication style? When should they escalate vs decide independently?

If you haven't said it clearly, it isn't an expectation – it's a hope. And hope isn't a management strategy.

If someone isn't performing the way you thought they would, your first question isn't 'why aren't they getting this?' – it should be 'have I made this clear enough for them to succeed?'.



Check-ins and feedback

Small, regular conversation = big impact

Probation works when nothing is left to guesswork, and this means two things need to happen consistently:

- You check in often enough to spot issues early, and
- You give feedback early enough to course correct

Check-ins during probation are structured moments to answer one question: 'are we confident this person is on track, and if not, what needs to change?'

The probation check-in rhythm:

- Weeks 1-4: weekly (high support and clarity)
- Mid probation: fortnightly (building ownership)
- Mid to end of probation: fortnightly (prepping for the probation outcome)

The line manager's role in probation is to:

- Spot misalignment quickly and reset
- Recalibrate expectation quickly and remove blockers
- Build a clear evidence trail of feedback

Feedback in probation

Feedback isn't optional. It's the mechanism that makes probation fair. It ensures people are given a real chance to improve, decisions are based on evidence, not a last-minute judgment, and no one is surprised at the end.





More feedback and the importance of checkpoints

The biggest probation failure is almost never performance – it's shock.

So, with that in mind, good probation feedback:

- Connects directly to the expectations from the start
- Is specific so they can act on it immediately and happens close to the behaviour, not weeks later
- Is consistent

And if you're not giving feedback, it can go wrong in the final review when:

- It's all fine, until of course, it's not
- Problems are raised for the first time in the final probation review
- Managers rely on instinct not evidence
- It feels unfair

Checkpoints matter in probation. They're structured moments when you pause and check that:

- You're still aligned on expectations
- They're on track for success
- If not, what needs to change now?

They also give line managers the opportunity to pause and ascertain fit to role or company, and plan if it isn't going the way they expected, with plenty of time before the end of probation.



The probation review meeting

It's not a plot twist, nor a pop quiz. It's a proper 'where are we at?' conversation.

First things first, what this meeting is NOT:

- Not the first time anything is being raised
- Not a surprise performance reveal
- Not a 'lets wing it and see how it feels' chat
- Not a judgment day moment in disguise

If it's any of those, the probation process has already gone off track.

What it should be is a joined-up conversation that brings together:

- Expectations (what 'good' looks like)
- Feedback (what's been said along the way. You may want to reach out to others to seek feedback, rather than it being just line manager feedback)
- Checkpoints (what's already been discussed)
- Progress (what actually happened)

As always, remember this is a two-way conversation. While you're there to assess the employee, they will also have feedback for you, the company, and the probation process – so make sure you're asking those questions too.





Probation outcomes

What is a probation outcome?

It's a clear decision, grounded in evidence about next steps.

The three possible outcomes (and yes, these are the only legally acceptable outcomes for the end of a probation period):

1. **Successful – confirmed in role:** the person is meeting expectations, their performance is consistent, feedback has been acted on, and you're happy with their progress.
2. **Probation is extended:** this means the person is not there yet, that some gaps still exist, but there's evidence of progress, so it's fair to give more time (not just delay a decision!). Critically, you need to set out a clear, supported path forward.
3. **Unsuccessful – not confirmed in role:** this means you're terminating the employee's employment on the basis that the role is not the right fit for this person. This means that expectations have not been met consistently, feedback hasn't resulted in the required change, or the role isn't the right match.

How do we communicate the outcome?

Calmly, directly, and with clarity, but remember your empathy and humanity. If you've followed all our steps, you're confirming a decision that the process has already supported and therefore shouldn't be a surprise.

Make sure you follow your internal processes with your internal teams when someone's employment is ended, including internal communications, team communications, IT, and payroll.

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Probation review templates



Probation review form – employee self review

Ideally, this goes to the employee and line manager two weeks ahead of the final probation review meeting.

Name		Manager	
Job title		Start date	
Team		Review date	

How do you feel you've settled into your new role? Are the responsibilities as you expected?	
What's gone well? What work achievements are you proud of? Where do you feel you add value? What feedback has stood out to you?	
What's been challenging? What parts of the role have been harder than expected? Where have you needed support? What's slowed you down or caused you uncertainty?	
Have you had the support you need to do your job well? What support has helped you the most?	



Probation review form – manager review

Ideally, this goes to the line manager two weeks ahead of the final probation review meeting.

Name		Manager	
Job title		Start date	
Team		Review date	

Role clarity and expectations What were the key expectations for the role? Have these changed during probation? Is there a shared understanding of good performance?	
Progress against expectations What's going well? What's consistently being delivered? Where is performance still developing?	
Feedback response How has the person responded to feedback? What changes have been observed? Are there any patterns not changing?	
Capability and behaviours Strengths observed Areas for development Any behavioural concerns (collaboration, accountability etc)	



Probation review form – manager review

Name		Manager	
Job title		Start date	
Team		Review date	
Support and environment Has the person had the support needed to succeed in the role? Have expectations been clear? Are there any blockers affecting performance? (tools, workload, team dynamics etc)			
Consistency check Is performance consistent or variable? Does it meet expectations regularly, or infrequently? Has improvement been sustained over time?			
Overall summary Summary of progress so far Key strengths demonstrated Key concerns or gaps			
Manager recommendation Successful completion of probation Probation extension Non confirmation of probation			



Probation check-in meeting framework

<p>Set the tone How's the role feeling for you this week/fortnight? Anything you'd like to make sure we cover today?</p>	
<p>Re-anchor expectations Are you clear on your role and expectations? What does success in the role look like for you right now? Has anything changed since we last spoke? <i>TIP: Keep the meeting focused on what good looks like</i></p>	
<p>Progress check What work are you most proud of since we last checked in? Where have you made most progress? Where has progress been slower than expected? <i>TIP: Focus on progress and delivery</i></p>	
<p>Confidence and capability What parts of the role are you feeling confident about? What still feels uncertain or challenging? Where do you need more support? <i>TIP: Identify the gaps</i></p>	
<p>Blockers and support What's getting in your way or slowing you down? Do you have the support you need to succeed?</p>	
<p>Next steps What are your priorities for the next week/fortnight? What can I do to support you?</p>	

The logo for 'hoomph' is written in a bold, lowercase, sans-serif font. A small 'TM' trademark symbol is positioned at the top right of the letter 'h'. The background of the slide features a large, stylized sunburst graphic in a light green color, composed of many pointed, petal-like shapes radiating from a central point. The overall background is a solid, vibrant green.

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**Any
questions?**

Ask the people team

A large, stylized graphic of a bee's wings, rendered in black against a bright blue background. The wings are positioned on the left and right sides of the page, framing the central text.

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