

3/6 Month Probation Report

Employee Name: <Employee name>
Meeting: <Meeting Date & Time>

Objective

The purpose of this meeting is for the employee and the Manager to discuss the past 3/6 months and highlight any areas that may need to be addressed as we move forward to permanent employment.

The team member 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.

****Note:** Should you have a six month probationary/qualifying period please adjust this form accordingly. You may also find it beneficial to use this form to complete an appraisal at the 3 month mark as well. A benefit of this approach is that your staff member will feel as though they are being respected and involved in the business. You will both have a clear understanding on actual performance vs. desired performance and have the opportunity to acknowledge work well done to date and develop an action plan with timelines for areas that need to be developed.

Three Month Review – Expectations

Within the initial three months, the basics of the role should be under control; as well as a good grasp of the broad business offering; ownership of the role; competence across the business administration and developing working relationships with key clients and stakeholders.

Format

Recap on the outcome of previous reviews, invite employee to talk about the past three months in total, talk about issues and improvements that they have made. (Document issues or concerns raised and come back to them at the close).

Manager gives feedback on performance over the past three months. (Highlight any relevant issues with examples if possible).

Discuss issues raised. (Document specific action or outcome).

Set expectations for the next 3 or 6 months which will be reviewed at the next performance review.

It is best practice now for the employee to have the opportunity to be able to prepare for the appraisal in much the same way as the employer. With this in mind we have put together two forms: One for the employee and one for the appraiser (ideally manager) to complete.

End positively.

Document Action Plan and ensure Employee receives a copy within two working days of the meeting. Please find below some examples of questions and suggested layout.

To be completed by the appraiser:

1. What are the employee's main achievements since commencing with <Company Name>?
2. What are the employee's strengths?
3. Comment on the employee's working relationships, communication skills, attitude, motivation and co-operation
4. Are there any areas where performance could be improved?
5. Has absence and/or timekeeping affected overall performance?
6. Has the employee undergone any training courses since commencing at <Company Name>?
7. How effective has the training proved in terms improving performance?
8. Does the employee require any further development to improve current performance?
9. Set objectives for the employee for <insert timeframe>
10. What assistance will be required in order to achieve the objectives?

Overall comments by the appraiser:

To be completed by the employee:

(The following points should be considered before your appraisal interview)

1. What do you consider to have been your principal duties, responsibilities and priorities since commencing with <Company Name>?
2. What do you feel are your main achievements since starting with <Company Name>?
3. What areas of your job do you feel you do well?
4. Which areas of your job do you do least well?
5. What needs to change for you to be more effective in your role?
6. Do you think you have a complete understanding of all aspects of your job?
7. Have you experienced any problems in relation to your job, management, colleagues or working environment?
8. Are there any area in which you would benefit from training and development in your curren't job?
9. How does our relationship need to change to be more effective?
10. List your objectives for <insert timeframe>:

I _____ (employee) have read and acknowledge the 3/6 Month Probation Review. I agree that the comments made are fair and have discussed all aspects with _____ (appraiser).

.....
Employee/s signature

.....
Appraiser's signature

Date: ___/___/___