



THE PROBATIONARY PERIOD

When a new employee joins a firm, continued employment is normally subject to satisfactory completion of a probationary period. For managers and professionally-qualified staff, the normal length of the probationary period is 3-6 months. For more junior employees, it's more usually 1-3 months.

The primary purpose of a probationary period is to provide a framework for identifying and sorting out the early difficulties which will almost inevitably occur in the performance of the job. Your responsibilities as an employer run deep in this regard (especially if you have headhunted your new employee out of their previous role) yet despite this, probationary periods are one of the most commonly mismanaged areas across the entire HR cycle).

The secondary purpose of a probationary period is to provide for early termination of employment if such difficulties are not resolvable during this period.

The purpose of this document is to provide some general guidance about how to get the best out of your new employee during and beyond the probationary period (the foundations you lay during the probationary period will go a long way to determining the long-term success of the individual in the job).

The advice is tailored to a 3-month probationary period and the timescales outlined may be extended or reduced to cater for longer or shorter probationary periods.

Induction

Good induction procedures help to motivate people, reduce staff turnover and reduce disputes. Getting it right permits a new employee to be effective promptly. Good induction pays for itself at all levels and is a vital part of building reputation and goodwill. Use this checklist as a base for your own company's induction programme.

- Acceptance of offer

The acceptance is not the end of the recruitment process – you now have to convert the candidate into a successful employee. A post-acceptance letter is helpful to tidy up loose ends and make the new employee feel wanted. Review your standard example and ask:

- Is it warm and friendly - does it say you look forward to their arrival?
- Does it say when, where and how they should start work?
- Do the starting dates chosen allow enough time to ensure the employee is welcomed, briefed, housed and utilised effectively?
- Does it encourage them to confirm planned holiday dates, particularly if you have promised to honour them?
- Does it invite contact before joining (essential if they're serving a 3-month notice period and advisable even if their notice period is only 1-month)?
- Does it confirm other things they were promised at interview (e.g. special equipment, organisation changes etc)?
- Does it enclose organisation charts or list names of key people so the candidate does not have to memorise them all on the first day?

- Before arrival

- Have you told everyone who needs to know (including payroll) when the employee is starting?
- Is their work area clean and ready?
- Is someone briefed as first day escort?
- Is there time in key contacts' diaries for a brief meeting?
- Has essential training been planned (including IT systems)?

- First day

The first-day brief should include:

- Rules
- Prohibitions
- Safety precautions
- Location of refreshments
- How to claim expenses (if applicable)

- Hours of work
- People to meet
- Corporate objectives
- Personal objectives
- Where work comes from
- Where work goes to
- Appraisal procedures

The first 5 items can be looked after by pretty much anyone and might be a good first opportunity for the new staff member to start building a relationship with one of their peers.

The other items in the list should be handled by the most senior person available – in an independent business this would ideally be the most senior person to whom the new employee will formally report (the person who will conduct the supervision meetings and probationary review).

Think about confirming the brief in writing - for example in an induction booklet or handout.

Management expectations and performance targets should be made explicit and understood by the new employee from the outset and any appropriate training should take place at the earliest opportunity.

You need to take time to understand any concerns that the new employee may have with any of their duties and make sure that you make available all the support they might need.

Supervision Meetings

For a 3-month probationary period, Supervision Meetings (between employee and line manager/director) should be scheduled for the end of weeks 2, 4 and 8.

The purpose of these meetings is to:

- cover work performance to date
- review progress and expectations
- set clear targets for the next 2 or 4 week period

During supervision meetings constructive feedback should be given to the employee highlighting both achievements and areas of weakness using suitable examples. The employee should be encouraged to identify areas of difficulty and ways of resolving these should be clearly defined and agreed. The employee should be encouraged to contribute views and ideas. You should provide guidance, direction or instruction as appropriate.

You should make a record of the meeting including any action agreed to resolve concerns and provide a copy to the employee.

Probationary Review

The Probationary Review should take place at least 5 days before the end of the three months probationary period.

The meeting should cover work performance over the full three months period and should also take account of the Supervision Meetings and any progress or problems following the last Supervision Meeting.

You should make a record of this meeting and provide a copy to the employee within five working days, together with written confirmation of the outcome of the probationary review – whether the employment is confirmed or not. In exceptional circumstances the probationary period can be extended for a further period.