

# QUICK START **ONBOARDING**

## SESSION 5: PHASE #5 6 Month Probation

The fastest, most practical tools for  
workforce expansion you will ever see



presented by


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## Workbook #5

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## Phase #5: 6 Month Probation

**No matter how brilliant your mind or strategy, if you're playing a solo game, you'll always lose out to a team.**

*Reid Hoffman, Co-founder of LinkedIn*

The amount of time you have as a Leader/Manager to motivate the new employee and make them successful can be quite limited. Work is busy and urgent demands often squeeze out the time you think you have available to nurture your team members. However, like all things in business, the more you put in, the more you get back with your staff. The investment is worth it!

With workplaces becoming increasingly flexible it is particularly important to maintain connections with your team over the long term. Managing your new starter throughout their probation period requires you to check in with them on a regular basis, even if they are not working onsite. "Out of sight" should definitely not equate to "out of mind". You need to be clearly visible and available to them, answering their questions in a timely manner, supporting them when they need help, and cheering them on when they do well.



## Probation Fast Facts



6 out of 10 managers have had an employee leave during probation due to poor onboarding.



Thirty-two percent state that company culture was a reason for leaving within the first three months.



Companies that offer comprehensive training programs enjoy a 24% higher profit margin than companies who spend less on training.



93% of employees want workplace training to be easy to complete and understand.

# The 4 Pillars of The Probation Period

These are the items to be covered in this phase to address each of the four key pillars of a successful Onboarding Program:



**CULTURE**

Encourage culture of shared learning.



**OUTCOMES**

Hold new starters accountable to role + team objectives.

Share business results + gain team input regularly.



**ADMIN**

Communicate how probation is tracked.



**TEAM**

Try + get feedback from peers throughout probation.

**When you do it right, you accelerate these new team members' time to productivity and help them deliver better results. And when you do it wrong, they are less productive, and they most often fail.**

*George Bradt, PrimeGenesis*

## Preparing For Success

You can do a lot of different things to increase an employee's comfort level and productivity in the first six months, from lunches to meetings to introductions and more. However, an individualised program shows them that you truly do care about their success within the business. There is no hard and fast way to do it, but a strategic combination of emails, meetings, events and training can make a big difference.

Use this time to continue to ask them how they are settling in, but also to be clear about future expectations and standards. You can continue to use the 'Check-In' questions but also add questions regarding performance, expectations and behaviours. One way to do this is by putting together a three-month and then a six-month plan for the new employee.

You can use the 'Goal Setting' template you created in Phase #2 to guide you through the development of the three-month and six-month plan. You will need to send a calendar invite to the new employee to invite them to a three-month and six-month review meeting.

### Establish Routine

Establish regular catch ups + confirm in calendars. There should be a minimum of two connection points; one at 3 months and the other at the 6 month mark

### Reward Learning

Encourage external learning and reward independent learning on their own time

# Activities Towards Successful Probation



## Performance

Set measures in this period for evaluation and assessment purposes. Use them to assess the speed at which the new starter is picking up their role. The insights you gain from managing your new starter well will help with planning and training required.



## Shadow

To improve the new starter's ability to handle more complex tasks, arrange for them to shadow a more experienced employee. People tend to pick things up more efficiently and quickly when they see things being done first-hand.



## Document

Have the new starter document their professional and personal growth goals. This is important as it will give insights into their career and how they may fit into any succession planning. The more the business goals align with theirs, the better the employee retention.



## Training

Find out if the new starter has completed their training. Closely follow the training and schedule anything further if it is required for their successful completion of probation.



## Assessment

Complete a formal assessment at three months and before the completion of six months. This should include catch-ups with their mentor and buddy. These chats will show how much the new starter has settled into their role and the company.



# Activating Outcomes: Defining Success

Establishing a very clear list of items that your new hire needs to achieve for their probation to have been successful is essential to their success. A list that spells out specific requirements will direct the training they are given and the way they focus their own efforts at work. The list will keep everyone on the same page not only throughout training, but as each item is completed. How wonderful it will be to have a reason to celebrate your new employee's wins together!

When compiling your list below, remember to keep it simple and straightforward without compromising the rigour of your expectations. Setting the bar too low will undermine your new starter's ambition and motivation. Setting the bar too high will create more hoops to jump through than are required. Also a motivation killer!

Create two lists for your new hire; one for completion at the three month mark, and the other after six months as their probation comes to a close. Also remember to cover off items in these four pillars:

- Culture
- Outcomes
- Admin
- Team

Brainstorm the items your new hire needs to achieve for their probation to have been successful.

#	Item
1	
2	
3	
4	
5	
6	
7	
8	
9	





# Team Touch Points: Gathering Feedback

After the first month with your new hire it is no longer necessary to run weekly meetings with them. However, keeping a close, supportive eye on their progress is still essential to their success. The best way to do this is to have a simple reporting system set up to help facilitate their supervision. A template that is completed weekly by their mentor/buddy AND their manager is ideal to gain a thorough insight into their performance. If this is not possible, finding one or two people who aren't you to record these observations keeps things objective and your desk free of admin.

If your team is small, or you'd prefer to manage the new hire yourself, that's perfectly fine. Regardless of who will be performing the supervision, the rigour of the items you include in the form will determine its success. When developing your observation template, consider these things:

- Consider ways to report on the four pillars of success: 1. Culture. 2. Outcomes. 3. Admin. 4. Team
- Create items in the form which can be simply ticked or rated for fast completion
- Include space for short comments against two or three items that need a more in-depth view
- Remember the importance of skills development as well as their attitude and engagement

Use the following template below to guide you through the creation of your own observation form. This form will be completed weekly by one or two members of your team. It will then be used to inform a monthly review for the new starter working through their 6 month probation period.

## Do It Online

By the way, there is no need for this form to be printed up and hand written. In fact, completing this process electronically will provide easy access for all involved. It will also make our natural environment smile. Create the template and store it centrally in the Team Member's online records. Give access to the new starter themselves, their buddy/mentor, their manager, and you of course as the owner. This will allow for smooth flow of information.

# New Starter Weekly Feedback

Manager Name: \_\_\_\_\_

Date: \_\_\_\_\_

New Starter Name: \_\_\_\_\_

Probation Week: \_\_\_\_\_

## Skills Development Feedback

	Rating or Yes / No

## Skills Development Comment:

## Team Development Feedback

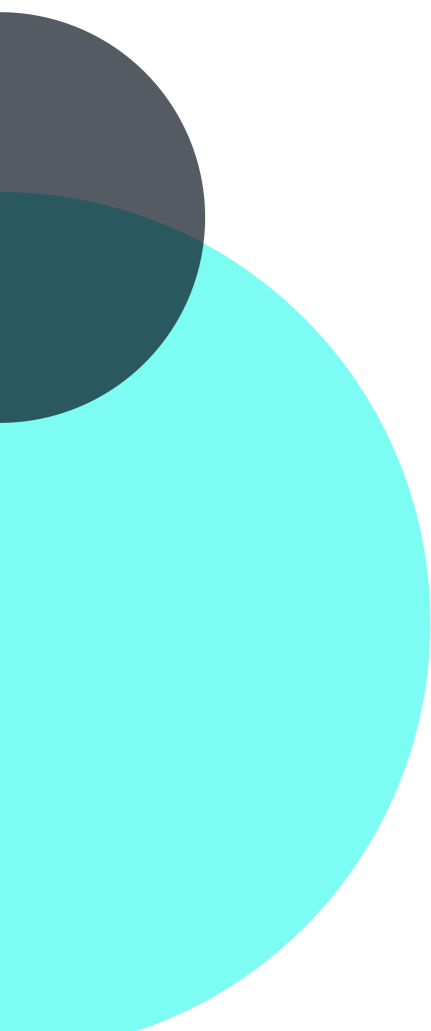

## Team Development Comment:

## Personal Development Feedback


### Personal Development Comment:

### Other feedback (including strengths or concerns):

### Actions recommended (if any):





# Administration In Action: 3 & 6 Month Review

With weekly reviews finishing up after the first month, the new hire still needs the support of being given constructive feedback as they move through their first few months of working with your company. Establishing a routine which has them meeting with you and the rest of their support team is the best way to keep the new starter on track. Meeting quarterly is ideal.

There is nothing worse for productivity and momentum than death by meetings. When planning this quarterly review session, think about the best ways to use the time of those involved. Create space for these items in your meeting agenda:

- Invite the new starter to share how they feel personally, with the team, and when working
- Give positive feedback to celebrate the strengths and achievements of the new starter
- Give constructive feedback to support them through weaknesses or concerns
- Revise the key items arising from the Weekly Feedback Form
- Work with the new starter to set goals for the next quarter

Use the following template below to guide you through the creation of a form which helps you review the performance of the new hire, taking into account the feedback and recommendation which come from their buddy and team. Be mindful that this form should also be accessible electronically.

# Quarterly Probation Feedback

Manager Name: \_\_\_\_\_

Date: \_\_\_\_\_

New Starter Name: \_\_\_\_\_

Probation Week: \_\_\_\_\_

## Buddy / Mentor Feedback

	Rating or Yes / No

Buddy / Mentor Comment:

Actions recommended (if any):

## Manager Feedback

	Rating or Yes / No

### Manager Comment:

### Actions recommended (if any):

## Owner Feedback

### Owner Comments:

### Actions recommended by Owner (if any):

Successful this Quarter?

Circle Yes / No

## From The New Hire

	Rating or Yes / No

## New Hire Comment:

## New Hire Questions:

## New Hire Concerns:

## New Hire Quarterly Goals

#	Goal	Completion Date
1		
2		
3		

Date & Time for next meeting: \_\_\_\_\_



# Activating Outcomes: Passing Probation

Completing the probation period is a significant milestone for your new employee. Notifying them that they have successfully completed their first six months with you is certainly cause for celebration. Once the new employee has successfully completed their probation, they need to be notified. Informally this would happen in the second Quarterly Probation Meeting, but you also need to put it in writing to make it official.

When planning how this milestone will be marked, remember these things:

- Passing probation is both a personal and professional achievement for the new starter
- The new starter's leaders should also be acknowledged for their contributions
- The team should share the celebration to continue building rapport
- Notification should be given in person and in writing

There are two tasks to complete to square away the learning in this session:

1. Gather your team to brainstorm some simple ways the happy event can be celebrated by all.



2. Draft an email to send to the new starter to notify them of their successful completion of their probation period. Make sure you include plans to attach a formal confirmation letter.

# Next Steps



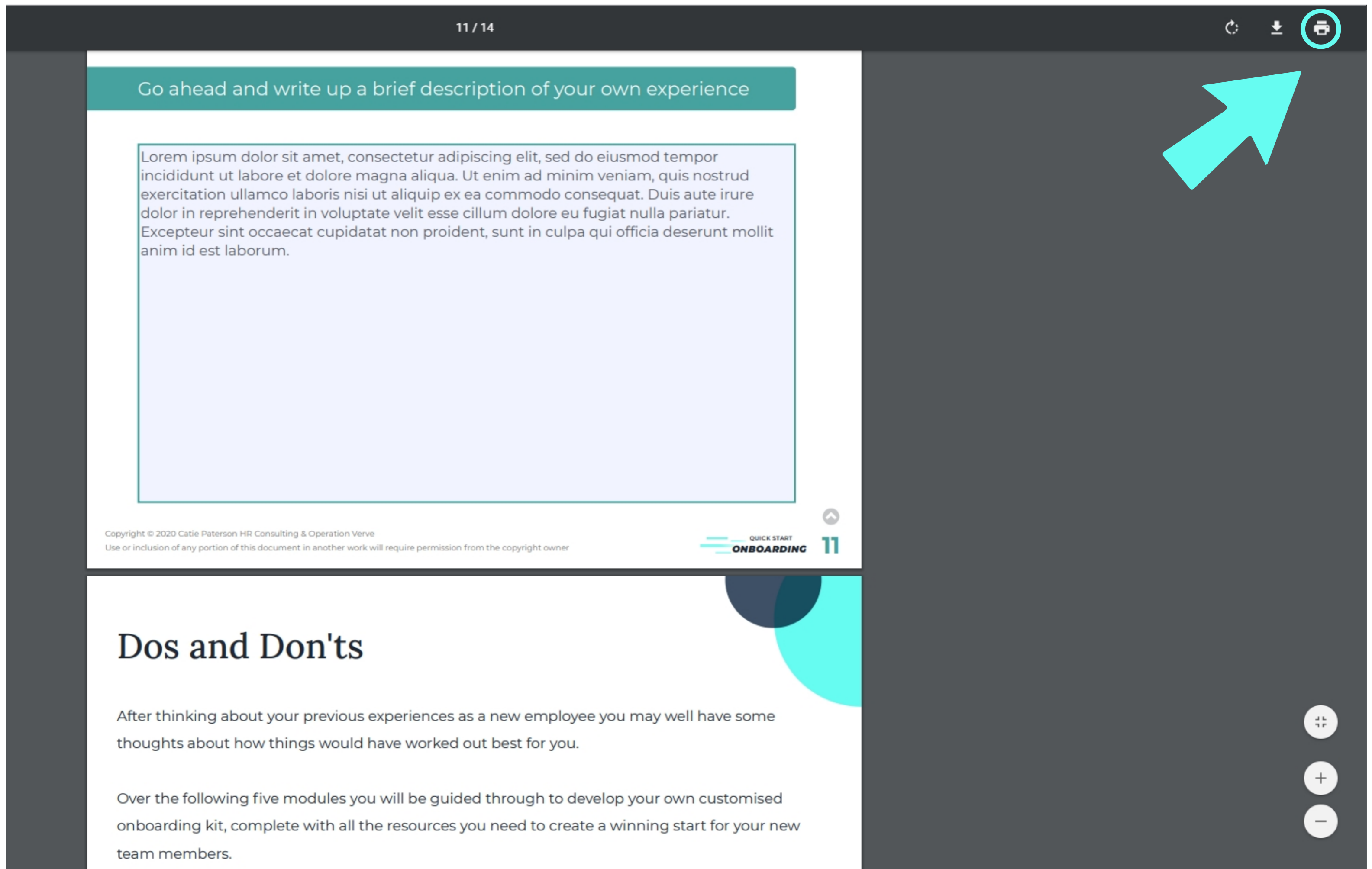
This fifth session of Quick Start Onboarding has guided you through the development of the systems and processes you need to successfully lead your new starter through their probation period. The resources you have developed will empower your new starter to grow their skills and confidence which will then in turn increase their engagement and contribution at work.

The final session of the program will support your new starter as they take bold strides towards their first year anniversary. We will show you simple ways that you can:

- Continue to monitor and nurture the new starter's progress through their first year
- Involve the team in providing support and celebrating wins
- Empower your business leaders to work with confidence and autonomy

**It's time for the final round!**

# Saving a PDF File on Google Chrome



The screenshot shows a PDF document titled "11 / 14" in the top right corner. The document content includes a heading "Go ahead and write up a brief description of your own experience" followed by a text area containing Lorem Ipsum placeholder text. Below this is a section titled "Dos and Don'ts" with two paragraphs of text. In the bottom right corner of the PDF viewer, a red arrow points to the "Print" icon in the toolbar. Other icons in the toolbar include a refresh button, a download button, and a zoom control menu with plus, minus, and reset symbols.

- Open the PDF file on Google Chrome
- Fill in all of the fields within the workbook
- After completing your workbook, select the Print icon

QUICK START  
**ONBOARDING**

## SESSION 1: Welcome to the Program

The fastest, most practical tools for  
workforce expansion you will ever see



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Print 14 pages

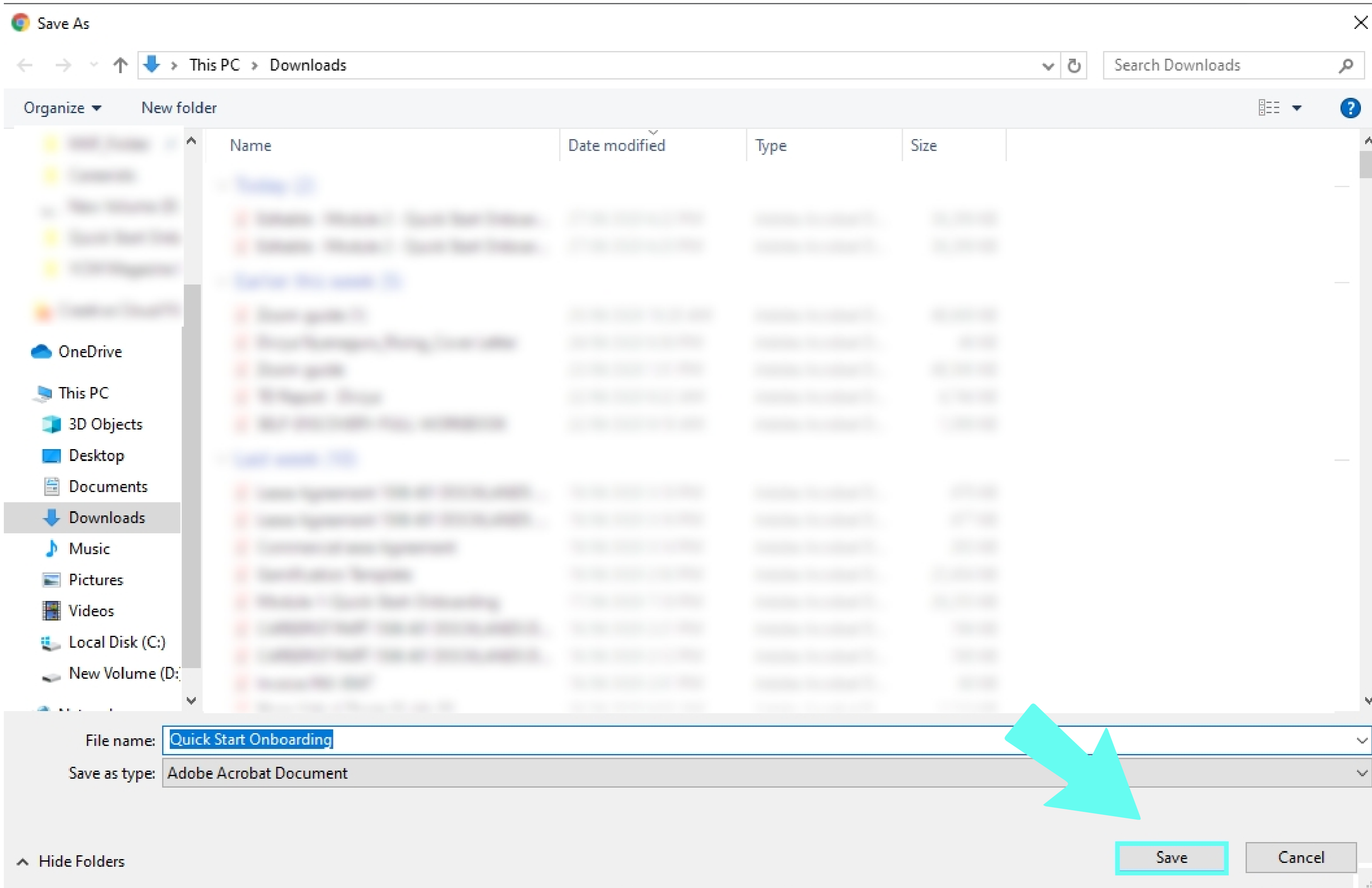
Destination 

Pages

Page 1

- Make sure the **Destination** reads **Save as PDF**. If it does not, click on the drop-down list and then select Save as PDF.
- Select the Save icon to save the file.



- Make sure to add a suitable name to the filename when you save, as it will help you to identify the workbook in the future.