Probation review

One form for the whole probation period: the plan, check-ins and the final decision · meeting 30 minutes per check-in

Example: a fictional customer success specialist on a six-month probation at a 150-person software company in Cyprus. Names and details are made up.

01 HOW TO USE THIS FORM

1. Who: the line manager runs the meetings and fills in the form; HR checks the final decision before it goes to the employee.
2. Day one: give the probation length and conditions in writing. In the EU this is due within seven days; in the UK it belongs in the day-one written statement.
3. First two weeks: agree three to five objectives, what good looks like by the end date and the support or training the person will get.
4. Check-ins: for two months or less, one halfway; for three months, around day 30 and day 60; for six months, after months 1 and 3. Hold the final review at least two weeks before the end date, earlier if notice has to fit inside the probation, as in France.
5. Share the form before each meeting and give the person a copy of your notes after it. They can add comments and ask to see the whole record.
6. If the person is ill or away when a meeting is due, move the meeting. Time away moves the end date only where local law allows or requires it.
7. Extending: first check that the contract and local law allow it; in some countries they don't. Then agree what must improve, how you'll measure it and the new dates, and confirm it in writing before the original end date.
8. Not passing: don't decide it in this form. Hold a separate meeting, follow your procedure (in Germany, hear the works council first), give the reasons in writing and give at least the notice that the contract and the law require.
9. This record goes to the personnel file. Only the employee, their manager and HR see it. Keep it for [period under your retention policy], then delete it.

02 EMPLOYEE AND KEY DATES

Fill this in at the start, together with the plan. Check the length, notice and extension rules in the contract and in local law.

Employee	Andreas Christodoulou
Role and team	Customer success specialist, Customer success
Manager	Katerina Michael, Head of Customer Success
Country of employment	Cyprus
Start date	1 March 2027
Probation length in the contract	6 months
End date	31 August 2027
Check-in dates	1 April 2027, 1 June 2027
Final review (at least two weeks before the end date)	2 August 2027
Last day to confirm an extension in writing	Not applicable: in Cyprus six months is the maximum, except for time away
Time away that may move the end date (only where allowed)	None

03 RATING SCALE

Rate against what you expect at this stage of the probation, not against an experienced colleague.

Rating	Label	What it means
1	**Not meeting expectations**	Clear gaps even with support. Agree what must change, by when, and what help is in place.
2	**Partly meeting expectations**	Progress in some areas, with specific gaps. Agree support and check again at the next meeting.
3	**Meeting expectations**	On track for this stage. A good result, not a middling one.
4	**Ahead of expectations**	Ahead of where we expect someone at this stage, with little guidance.
N/O	**Not observed yet**	No chance to show this so far. Say when it will come up.

04 PROBATION PLAN

Agreed in the first two weeks. Objectives can change if the role changes; note the date and who agreed it.

Objective	What good looks like by the end date	Support and training
Look after a portfolio of customer accounts	Owns 40 accounts; first reply within 4 working hours on 90% of tickets	Shadowing in weeks 1–3; ticket tool training
Run onboarding calls for new customers	Leads 10 calls with the onboarding checklist; average rating 4.5 of 5 or higher	Two calls with the team lead first
Learn the reporting module	Passes the internal product certification by month 4	Certification course; 1 hour a week of study time

05 CHECK-INS

One row per meeting. Rate overall progress for that stage on the scale above.

Meeting	What went well	What to improve, and support agreed	Rating
Check-in 1	Learned the ticket tool quickly; clear notes on every case.	Escalates billing questions late. Agreed: ask the billing channel after 30 minutes.	3
Check-in 2	Took over 45 accounts; first replies on time.	Onboarding calls run long. Shadow two calls with the team lead.	3
Final review	All three objectives met; customers name him in their feedback.	Keep calls within 45 minutes. Next: own the renewals checklist.	4

06 OBJECTIVES AT THE FINAL REVIEW

Objective	Result, with evidence	Rating
Look after a portfolio of customer accounts	45 accounts since month 2; 93% of first replies within 4 hours over the last 8 weeks	4
Run onboarding calls for new customers	Led 14 calls; average rating 4.6 of 5	3
Learn the reporting module	Certified in month 3; wrote two help articles on reports	4

07 WAYS OF WORKING

Give an example for every rating of 1, 2 or 4.

Area	What good looks like	Rating
Quality of work	Work is accurate and needs little rework for this stage.	3
Learning	Picks up tools and processes, asks for help early and uses feedback.	4
Reliability	Keeps agreed deadlines and tells the team early when plans change.	3
Collaboration	Works well with the team and other teams and shares what they know.	4
Conduct and values	Acts in line with the company's values and policies.	3

08 THE EMPLOYEE'S VIEW

The employee fills this in before the final review.

What has gone well for you?

The onboarding plan and a buddy in the team: I always knew who to ask.

What has been harder than expected?

Billing questions. The rules are spread across three documents.

What support would help you most in the next six months?

A session with finance on billing, and time to write the missing help articles.

What should we change in onboarding for the next person?

Access to all tools on day one. I waited a week for the CRM.

09 DECISION

Base the decision on the plan, the check-ins and the evidence above. Answer only the block that applies.

Decision

Confirm

Reasons, with examples

All three objectives met; ratings of 3–4 in every area; strong customer feedback.

Confirmed: written confirmation and any updated terms sent on

4 August 2027

Extended: new end date, within the legal maximum

Not applicable

Extended: what must improve, how we'll measure it, check-in dates

Not applicable

Extended: confirmed in writing on (before the original end date)

Not applicable

Ending: date of the separate meeting, and the steps your procedure requires (companion, works council)

Not applicable

Ending: reasons given in writing on, notice period, how to appeal

Not applicable

10 AFTER PROBATION

Goals for the next six months

Own the renewals checklist for 20 accounts. Help the next new hire learn the ticket tool.

Development agreed

Billing session with finance in September; product certification, level 2.

First regular performance review

February 2028, in the annual cycle

11 COMMENTS AND SIGN-OFF

Employee comments

I agree with the summary. Thanks for the support with billing.

Signatures

Andreas Christodoulou, 2 August 2027 Katerina Michael, 2 August 2027 HR business partner, 3 August 2027

Signing confirms the meeting took place and the employee received a copy. It does not mean they agree with every point.