

CULTURE EDGE

# Probation Review Guide



**Questions to ask, mistakes to avoid, and how to lead with  
clarity and care.**

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# Human-centred probation

Probation is your opportunity to set people up for success with a human-centred approach that accelerates performance.

By the time someone joins your team, you've already seen their potential. Probation is where that promise becomes contribution, and where trust, clarity and performance take shape. It's not a formality. It's a chance to lead early and lead well.

When done well, probation helps you:

- Strengthen two-way communication
- Reinforce expectations and values
- Respond early to support needs

It shortens the gap between the potential you hired and the performance your business needs, while keeping the person behind the role in view.

This guide will help you:

- Lead probation conversations with clarity and care
- Build confidence and direction early
- Make informed decisions that support people and performance

Great outcomes start when people feel supported and enabled to succeed.

# What a probation review is

- 01 A two-way conversation about how things are going for both of you
- 02 A chance to reinforce expectations, values, and ways of working
- 03 A moment to recognise what's working and what needs support
- 04 An opportunity to build clarity, confidence and direction early
- 05 A reset point (if needed) before small issues become big ones
- 06 A proactive leadership practice that shapes culture and performance



## WHAT IT ISN'T

A one-sided evaluation that catches people off guard

A generic "how are you going?" chat

A formality that adds no value

A final judgement with no lead-up or support

A place to bring up concerns for the very first time

Something HR forces you to do at 3 or 6 months



## Common mistakes to avoid

- **Leaving it too late:** Waiting until day 89 helps no one. Check in early and course-correct to enable success.
- **Treating it like a formality:** If it feels like a box-tick, it loses meaning. Make it real. Reflect, reset and build momentum.
- **Only focusing on tasks:** Performance matters but so does the person. Ask what they need to succeed and help them get it.
- **Avoiding honest feedback:** Silence isn't kindness, it's confusion. Be clear about progress early so they can grow.

## 5 KEY QUESTIONS TO ASK IN A PROBATION REVIEW

Use these to prompt a meaningful, human conversation:

- ? What's feeling clear and what's still unclear about your role?
- ? What's been working well and what's been challenging?
- ? What feedback have you received so far? What's stuck with you?
- ? Where do you feel most confident? Where would more support help?
- ? Is there anything I should be doing differently to set you up for success?

**Tip:** Don't skip your own reflection. Be ready to give feedback as well as ask for it.

# If things aren't working out

Probation is the time to act, not delay. If things aren't working out:

- Be honest early
- Document concerns objectively and factually
- Seek advice before taking formal action
- Make sure the process aligns with your contract, award, and applicable legislation

## Probation review checklist

- ☐ I've observed their performance and behaviour over time
- ☐ I've clearly and regularly communicated expectations
- ☐ I've provided useful feedback throughout the probation period
- ☐ I've gathered input from colleagues or clients where relevant
- ☐ I'm confident in my recommendation and ready to explain it clearly



## Want More?

Culture Edge can help with:

- Tailored probation review templates
- Conversation guides for tricky discussions
- Briefing packs for first-time people managers
- Policy alignment and compliance checks