



Robinson Grace
HR CONSULTANCY

Managing Effective Probation Periods

Date: 29th September 2026

Time: 0930 - 1300

Venue: Microsoft Teams Online Platform

Fee: £147 + VAT (10% discount if multiple spaces booked)

This workshop is aimed at line managers responsible for onboarding and managing new starters, HR professionals supporting managers through probation processes, team leaders or supervisors who provide feedback and monitor performance, and organisations wanting to reduce risk, improve consistency and strengthen people management capability.

Aim

This workshop equips managers and HR professionals with the confidence, structure, and practical tools needed to manage probation periods fairly, consistently, and in line with good practice. It focuses on building a clear process, using documentation effectively, and strengthening decision-making when performance or conduct concerns arise during probation.

What is it about?

Effectively managing probation relies on understanding how to use the organisation's existing documentation to guide conversations, monitor progress, and support fair decision-making. Probation issues can stem from capability, conduct, behaviour, or a mismatch in expectations, and managers need to recognise which area is causing concern so they can take the right steps at the right time.

This workshop explores how to use probation templates, review forms, and meeting notes to structure discussions, provide clear and evidence-based feedback, and address concerns early. It also supports managers in navigating challenging situations confidently, including when to extend probation or make the difficult decision to bring employment to an end.

The training involves a mix of interactive exercises and discussion around:

- The purpose of probation and how to set expectations from day one
- A clear, step-by-step process and timeline for managing probation effectively
- Why robust documentation matters - and the legal and organisational risks of poor record-keeping
- How to give constructive, evidence-based feedback throughout the probation period
- Spotting early warning signs and addressing issues promptly
- When and how to extend probation fairly
- Making the difficult decision to fail a probation period - and how to handle this confidently and compliantly

About Your Trainer



With more than 6 years' experience within the Apprenticeship and Education sector, specialising in delivering training and coaching, Claire's passion for learning and professional development underpins her approach, enabling her to support and coach individuals, Managers and organisations with clarity, confidence and practical insight.

How To Book

To book, please email
clientservices@robinsongracehr.com

Confirming your booking creates a legally binding contract between us. Cancellations are to be requested by email only. Payment is required in advance of the course. Refunds must be requested 2 weeks prior to the course date. No refunds will be issued within two weeks of the course date.



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Learning Outcomes

- By the end of the workshop, participants will be able to:
- Understand the full probation lifecycle and apply a structured, consistent approach
- Set clear expectations and performance standards from the outset
- Provide timely, constructive, and evidence-based feedback to support employee success
- Document conversations and decisions in a way that protects both the organisation and the employee
- Identify when a probation extension is appropriate and how to manage it effectively
- Make informed, fair decisions about failing probation, including how to communicate outcomes professionally
- Reduce organisational risk by managing probation in line with best practice and legal considerations

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