W• Welivo

Probation review

Sales version, three reviews and a decision. welivo.co.uk/templates/probation-review-template

Rep	
Role and start date	
Manager	
Probation end date	
Decision made by (before 5 months' service)	

1. Ramp-up expectations (agreed with the rep at the start)

Measure	By review 1 (week 4)	By review 2 (week 12)	By review 3 (week 20)
Primary result (revenue or sales)			
Activity (calls or meetings a day)			
Pipeline created			
Skill signed off by manager			

2. What the manager commits to (what, by which date)

Commitment 1	
Commitment 2	
Commitment 3	

3. Review log

Review	Date	Figures against ramp	Support given (rep confirms: yes / no)	Rep comments
1 (week 4)				
2 (week 12)				
3 (week 20)				

4. Outcome (tick one, then give the reasons in numbers)

☐ Passed probation	
☐ Extended. New end date:	
☐ Ending employment. Date decision made:	
Reasons, with figures	
Date the rep was told, and how	

5. Sign-off

Rep signature and date	
Manager signature and date	

Decide before five months of service, not after. Share each review record with the rep afterwards. Not legal advice: check your contract and procedure with Acas or a solicitor. © Certi Technologies Ltd, welivo.co.uk