Helping your team succeed

A practical manager guide to new-starter reviews, recognition and everyday conversations.

Your job in a new-starter review is to help the person succeed in their new role.

Find out what is going well, what is getting in the way and what support you need to provide. Be clear about expectations, recognize progress and agree what each of you will do next. A useful review ends with the colleague knowing where they stand and knowing that you will follow through.

Start with the conversation

Use the four-, eight- and twelve-week reviews as connected conversations. Read the previous notes before each meeting. Give the colleague time to speak, record their view fairly and check the commitments you made last time.

The forms share the same layout so the conversation feels familiar. The questions change as the person settles in, grows in confidence and plans their next steps. Use extra space or a separate sheet when needed.

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Created for NewsAndWins from Graham Banks's practical management experience. Use the resources that help your team and adapt the timing to the role.

Keep completed reviews and personal preferences private. These are conversation resources; follow your organization's separate process for formal employment decisions.

Preparing for a useful review

Make time for a proper conversation and arrive ready to help.

Before you meet

Book a quiet time and share the questions beforehand. Bring the previous actions, examples of work and any relevant training notes. Consider the information, equipment, practice and guidance the person has actually received before judging their progress.

Open with the purpose

“This time is for us to make sure you have what you need to succeed here. I want to hear how it is going, what feels unclear and what I can do to help. We will agree the next steps together.”

Listen before you respond

Let them finish. Ask for a recent example when something is unclear. Check what you have understood and invite corrections. If their experience differs from yours, record both views and agree how to find out more.

Be specific about progress and concerns

Explain what the person did and why it mattered. If something needs to improve, describe the task or behavior, the expected standard and the help available. Ask what is making it difficult. Bring up concerns when they arise so the review does not contain avoidable surprises.

Make your support concrete

“I will support you more” is hard to follow up. Agree the actual help, who will provide it and when. Check that the colleague understands the next step and has time to practice it.

Fictional example: a new team member is unsure how to write a customer update. The manager agrees to walk through two examples on Tuesday. The colleague will draft the next update, and they will review it together on Friday.

Commit to the basics

- Keep the reviews you arrange, and rebook promptly if a change is unavoidable.
- Provide the information, equipment and training needed to do the job well.
- Give useful feedback and acknowledge progress throughout the first twelve weeks.
- Record your own actions, deliver them and explain early if something changes.

After the meeting, share the agreed notes with the colleague, invite corrections and book the next conversation. Help that is needed now should start now.

4 week review

Settling into the role. Find out how the first few weeks have felt and whether the basics are in place.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager purpose: help this person succeed in their role. Listen, clarify expectations and agree the support you will provide.

How has it been so far

What have you enjoyed most? What has been harder than you expected?

What feels clear and what still feels uncertain

Can you explain the main expectations of your role in your own words?

What would help you do the job well

Consider information, equipment, training, time and someone to ask for help.

What progress should we recognize

What are you pleased with? Share specific feedback you have received.

What do you need from your manager

Is there something I should explain, arrange or do differently?

Continue on the next page to record feedback, commitments and the next review.

4 week review actions

Complete this page together. Give each action an owner and a date.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager feedback and colleague response

Record specific examples, their context and any difference in views.

What will happen	Who will do it	By when	How we will check

My commitment as the manager

What help will I provide or arrange, and by when?

The colleague's next step

What will they work on, with what support?

Next conversation: week 8 Date _____ Earlier check-in if needed _____

Notes shared on _____ Colleague corrections or additions _____

Manager _____ Colleague _____

8 week review

Building confidence. Check what has changed since week four and whether the promised support has arrived.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager purpose: help this person succeed in their role. Listen, clarify expectations and agree the support you will provide.

How has it been since the last review

What feels easier now? What is still taking more effort than expected?

What feels clear and what still feels uncertain

Where do you feel confident working independently, and where would guidance help?

What would help you do the job well

Review the actions from week four. What is complete, outstanding or no longer useful?

What progress should we recognize

What have you learned or improved? Which contributions may have gone unnoticed?

What do you need from your manager

Are your ideas heard? Have I provided the help I promised? What should change?

Continue on the next page to record feedback, commitments and the next review.

8 week review actions

Complete this page together. Give each action an owner and a date.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager feedback and colleague response

Record specific examples, their context and any difference in views.

What will happen	Who will do it	By when	How we will check

My commitment as the manager

What help will I provide or arrange, and by when?

The colleague's next step

What will they work on, with what support?

Next conversation: week 12 Date _____ Earlier check-in if needed _____

Notes shared on _____ Colleague corrections or additions _____

Manager _____ Colleague _____

12 week review

Succeeding beyond the first twelve weeks. Review progress across the first three months and agree the support and direction for the next stage.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager purpose: help this person succeed in their role. Listen, clarify expectations and agree the support you will provide.

How has it been since you joined

What are you most pleased with? What remains difficult or different from what you expected?

What feels clear and what still feels uncertain

Are the standards and priorities clear? Where do you still need practice or guidance?

What would help you do the job well

Review the actions from week eight. What training, equipment or support is still needed?

What progress should we recognize

Which skills, relationships or contributions have developed? Use specific examples.

What do you need from your manager

What should I keep doing or change? What would help you succeed over the next few months?

Continue on the next page to record feedback, commitments and the next review.

12 week review actions

Complete this page together. Give each action an owner and a date.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager feedback and colleague response

Record specific examples, their context and any difference in views.

What will happen	Who will do it	By when	How we will check

My commitment as the manager

What help will I provide or arrange, and by when?

The colleague's next step

What will they work on, with what support?

Next regular one-to-one: _____ Development follow-up: _____

Notes shared on _____ Colleague corrections or additions _____

Manager _____ Colleague _____

Recognition preferences

A thank-you should feel comfortable and meaningful to the person receiving it.

Ask the colleague to complete this with you or in their own time. Every answer is optional, and preferences can change. Keep the responses private and use them to guide how you recognize good work.

Name _____ Date _____

How do you prefer to be thanked

Privately in person, in a personal message, or in a team setting after checking with you? Something else?

What makes recognition meaningful to you

For example, a specific explanation of what helped, a handwritten note, customer feedback or an opportunity to learn.

Whose feedback matters to you

Your manager, teammates, customers or someone else? It is fine to have no preference.

What would you rather avoid

Consider surprises, public attention or particular kinds of gifts and celebrations.

Which work milestones would you like acknowledged

For example, completing training or a work anniversary. No family details or personal dates are needed.

How should we check before sharing more widely

Agree the audience and the particular name, photo or story each time. This sheet is not blanket publicity permission.

Manager reminder: recognize dependable everyday work as well as standout moments. Be timely, specific and sincere. Offer only gestures or opportunities you can provide fairly.

Regular one to one conversation

Keep listening and following through after the new-starter reviews finish.

Colleague _____ Role _____

Manager _____ Meeting date _____

Start with the colleague's priorities. Use the prompts that fit today's conversation and make space for anything they want to raise.

What has happened since we last met

Which agreed actions are complete? What still needs attention?

What is going well

What contribution, progress or customer feedback should we acknowledge?

What is getting in your way

What is unclear, difficult or taking more time than it should?

What support or development would help

What do you need from me? Is there a skill you would like to practice?

Agreed action	Owner	By when

Next conversation _____ Notes shared _____

Looking back and planning ahead

Use this for a fuller review of someone's work and development. Agree the period you are discussing.

Colleague _____ Role _____

Manager _____ Meeting date _____

Period covered _____

What are you most pleased with

Identify achievements and dependable contributions, with examples.

What was difficult and what did you learn

Consider circumstances, decisions, support and what you would do differently.

How did you put our team standards into practice

Use observable actions: helping a colleague, handling a customer issue or following an agreed way of working.

What would you like to build on or develop

Explore strengths, interests and the skills the role needs. Staying confident in the current role is a valid aim.

What support did the manager provide

What was useful? What was missing? What should change?

Agree the next priorities using the development plan. Include the colleague's view and the manager's responsibilities, and share the completed notes.

Development plan

Choose a small number of priorities that you can give time and support to. Use one sheet for each priority.

Colleague _____ Role _____

Manager _____ Meeting date _____

What are we working towards

Name the skill, knowledge or way of working. Explain why it matters to the colleague and the role.

What will success look like

Describe something you can observe or demonstrate. Agree a realistic timeframe.

Action or practice	Owner	Support needed	By when

What will the manager arrange

Consider protected practice time, equipment, coaching, examples or access to a knowledgeable colleague.

Review date _____ How we will check progress _____

What happened and what comes next

Complete at the follow-up. Record progress, remaining obstacles and any changes to the plan.

A rhythm for team conversations

An example schedule you can adapt to the person and the role.

Book the early reviews when someone joins. Keep everyday feedback and help going between meetings. If someone needs support sooner, arrange it rather than waiting for the next date.

When	Purpose	What to carry forward
First week	Help the person feel welcome and understand the basics.	Who to ask, key expectations, equipment and initial training.
Four weeks	Check the foundations.	What is unclear, early progress and the support needed.
Eight weeks	Build confidence and check follow-through.	Progress against the four-week commitments and remaining obstacles.
Twelve weeks	Plan for sustained success.	Progress since joining, ongoing support and the next development priority.
Regular one-to-ones	Keep communication and support active.	Recognition, current priorities and agreed actions. A monthly conversation may be a useful starting point.
Quarterly or mid-year	Take a wider look at development.	Changing priorities, strengths to build on and any support gaps.
Annual review	Reflect over a longer period and plan ahead.	Achievements, learning and agreed development for the next period.

Agree a practical routine

Choose times when both people can give the conversation their attention. Let the person prepare, keep the meeting private and leave time to agree actions. The quality of the conversation and the follow-through matter more than a fixed duration.

Keep the thread between meetings

Start each conversation with the previous commitments. Close it by confirming who will do what, the help available and when you will meet again. Share the record and invite corrections.

A twelve-week review does not automatically decide employment status. Handle formal decisions through your organization’s established process.

Communicating clearly

Help people understand what matters and what to do next.

Explain the purpose and the next step

Say what has changed, who it affects and what you need the person to do. Use familiar words and make dates, responsibilities and sources of help clear. If several points compete for attention, put the most important one first.

Make room for a real answer

Ask an open question such as “What might make this difficult?” Give the person time to answer. Listen without preparing your reply, and ask for an example when you need to understand more.

Check understanding without testing the person

Ask them to talk through the next step, or summarise what you have heard and invite a correction. If something was unclear, explain it differently. A message being read or acknowledged does not tell you whether it was understood.

Be clear about who owns the action

Fictional example: “Tomorrow, send the office a message before leaving your final visit. Include anything still outstanding so we can arrange the next step. If you cannot reach us in the app, use the usual phone contact. What might make that difficult on your route?”

Give recognition enough context

Name the action and the difference it made. A private thank-you may be the right choice; use the colleague’s preferences before sharing it with the team.

Fictional example: “Thank you for calling the office as soon as you spotted the missing item. That gave us time to arrange it before the next visit.”

Choose the right place for the conversation

Use shared updates for information the team needs, and private conversations for individual matters. Keep completed reviews and personal development records in your organization’s appropriate private record system.

NewsAndWins helps service teams share updates, communicate and recognize good work. Use these resources to support the conversations around that work.

Explore recognition ideas and team communication at newsandwins.com.