

Marcus Finch
Operations Manager
Employer HR file

Date: 14 July 2026
Our Reference: EPR/B829B1ED
Document Type: HR record

Probation Outcome Record

1. EXECUTIVE SUMMARY

This record summarises the probation review outcome for Marcus Finch, Operations Manager. The review was conducted to assess his progress against agreed objectives within the probation period and to determine the next steps in his employment journey with HRHeaven QA Sample Employer.

The probation review meeting took place on 10 July 2025. The overall outcome is to complete this stage of probation, with a scheduled follow-up review on 10 October 2025 to monitor ongoing development and integration.

2. CASE SUMMARY

Marcus Finch has been undergoing a probationary period as an Operations Manager. The most recent probation review was held on 10 July 2025 to evaluate his performance and achievement of key objectives.

The objectives reviewed included vendor consolidation, procurement turnaround, and implementation of a new term-time rostering system.

Based on the discussions and assessment, the decision at this stage is to formally complete this part of the probation process and to continue monitoring progress with a subsequent review scheduled.

This document serves as a formal record of the probation outcome and the agreed next steps.

HR RECORD DETAILS

Employee
Marcus Finch

Role
Operations Manager

Case type
End Probation

Reference
HRA-B829B1ED

KEY DATES

Completed
14 July 2026

First review
10 July 2025

Continued

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3. BACKGROUND

Marcus Finch joined HRHeaven QA Sample Employer as Operations Manager and has been subject to the standard probationary procedure.

During the probation period, specific objectives were set to assess his suitability for the role, focusing on operational efficiencies and project delivery.

The probation review held on 10 July 2025 was part of the scheduled evaluation process to review progress, performance, and identify any support needed.

4. INFORMATION CONSIDERED

The meeting reviewed progress against the following objectives:

- Vendor consolidation, which has been achieved successfully.
- Procurement turnaround, which has been partially met, with discussion on the factors leading to the current status and mitigation strategies.
- Rollout of a new term-time rostering system, which has experienced delays due to integration issues with IT systems.

During the meeting, causes for delays and partial completion were discussed along with potential support plans to facilitate progress.

No additional documentary evidence was attached or reviewed beyond internal progress updates and meeting notes. It is recommended that any related documentation be reviewed by the employer to confirm these details prior to finalising the record.

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5. DECISION

The decision is to complete this stage of probation for Marcus Finch.

This concludes the formal assessment phase of the probation period with recognition of achievements and acknowledged development areas.

A follow-up review has been arranged for 10 October 2025 to revisit ongoing objectives and assess further performance developments.

6. REASONS

Vendor consolidation has been successfully completed, demonstrating capability and adherence to operational expectations.

Procurement turnaround, while not fully achieved, was discussed transparently with identification of challenges and a constructive plan to address these.

The delay in the term-time rostering system implementation was linked to external IT integration issues beyond immediate control, and plans have been put in place to support resolution.

The overall progress indicates that Marcus Finch is meeting the role requirements sufficiently to proceed past this probation stage, albeit with continued attention to certain objectives.

The decision reflects a balanced assessment of achievements against remaining challenges and the intention to provide ongoing support.

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7. FOLLOW-UP ACTIONS

Schedule and conduct the follow-up probation review on 10 October 2025 to evaluate continuous progress against outstanding objectives.

Assign an owner responsible for monitoring the outstanding procurement turnaround and rostering system implementation milestones.

Maintain documentation of ongoing support and feedback provided to Marcus Finch between review periods.

Review any supporting evidence or documents related to the probation outcomes before finalising the personnel record.

Ensure all actions and support plans are clearly recorded in Marcus Finch's personnel file.

8. AUDIT INFORMATION

Probation review meeting date: 10 July 2025.

Outcome recorded and probation stage completed on: 14 July 2026.

Next review date set for: 10 October 2025.

Document prepared for HRHeaven QA Sample Employer by HR consultancy support.

No legal, medical or disciplinary conclusions have been drawn in this record.

Employer to verify and confirm all facts and evidence for accuracy before official filing.