



The Filipino Offshore Leadership System





MANAGER'S TOOLKIT | MODULE 03

Onboarding and the **First 6 Months**

Building Clarity, Confidence, and Trust

Why and how the first six months shape the entire leadership relationship.



MODULE OVERVIEW



What's In This Module

This module guides managers through the first six months of an employee's journey. It covers every tool, conversation, template, and cultural insight you need to onboard with confidence and build a foundation for long-term performance.

Section	What It Covers
Why This Matters	The cultural and operational case for getting onboarding right.
Relationship Journey and Filipino Culture	How to build trust, create safety, and apply malasakit in practice.
The 1-6 Month Journey at a Glance	The four-phase framework: Clarity, Alignment, Ownership, Confirmation.
1. Onboarding Checklist (Day 0-30)	What to cover in the first month, with conversation prompts.
2. Vision Setting	How to connect the employee's role to business impact.
3. Culture and Values Alignment	Making behavioral expectations explicit from Day 1.
4. Goal Setting (SMART + Impact)	Templates, capacity checks, and KPI planning.
5. Check-In Guide (1-6 Months)	Cadence, focus areas, and prompts for each phase.
6. Organization Points of Contact	Who to go to for what, and how to set escalation expectations.
7. Performance Discussion Guide	Step-by-step conversation framework for structured feedback.
8. 30/60/90/180-Day Evaluation	How to track progress and confirm permanent employment fairly.
180-Day Leadership Checkpoint	A self-check for managers before the confirmation decision.



Why This Matters

The first six months determine whether employees stay quiet or contribute confidently.

Managers who set clear expectations, invite dialogue through regular check-ins, and provide early feedback enable Filipino employees to ask questions, share insights, and perform confidently, rather than managing uncertainty in silence.

When managers get this stage right, concerns surface earlier, misalignment is corrected sooner, and teams operate with fewer surprises and less rework.

What Employees Are Learning in These First 6 Months

The first six months shape how employees perform long-term. This stage is about more than what people deliver early on. Employees are learning:

- **How safe it is to ask questions.**
- **How expectations are clarified.**
- **How feedback is handled.**
- **Whether speaking up leads to support or consequences.**



Understanding the Filipino Cultural Context

For Filipino employees, this phase is especially important. Many are raised to listen to and follow elders and authority figures. Questioning or challenging someone in a leadership position can feel disrespectful.

Over time, this cultural conditioning reinforces harmony, politeness, and indirect communication.

As a result:

- Concerns may remain unspoken.
- Questions may be delayed out of respect for authority.
- "Yes" may reflect willingness to try, not full clarity.
- Silence may signal hesitation rather than alignment or agreement.

*This **does not** indicate disengagement or lack of ownership. It reflects deeply ingrained social norms rooted in kapwa, the Filipino value of shared humanity and responsibility to preserve relationships.*





Managers play a critical role in reshaping this dynamic at work.

By explicitly inviting dialogue, checking understanding, modeling openness, and responding calmly, managers gradually create psychological safety.

This shift takes time. Employees may have spent years being taught to avoid challenging authority.

Consistent leadership makes a measurable difference.

When Safety Is Established

- Concerns are raised earlier.
- Misunderstandings are corrected sooner.
- Performance risks are addressed before they escalate.
- Delivery becomes more predictable.



Relationship Journey and Application of Filipino Culture

Core Principle: Building relationships based on trust creates a safe space. That is *the* foundation for Filipino employees to speak up, ask questions, and take initiative.

Manager Tip

Personal connection is not a nice-to-have. In Filipino teams, it directly supports confidence and performance.

For Filipino Teams

Dynamic

What It Means in Practice

Personal connection supports professional confidence

Employees who feel seen as people (*not just workers*) perform better and speak up earlier.

Safety enables honesty

When employees trust their manager, they raise concerns instead of absorbing them silently.

Structure reduces fear of mistakes

Clear expectations and normalized mistakes during learning remove the anxiety of getting things wrong.





How to Build Trust and Create a Safe Space

Get to Know Employees on a Personal Level

Spend the first few minutes of every check-in on life outside work. Ask about their weekend, their family, what they're looking forward to.

This signals *malasakit*, a Filipino term embodying deep compassion and sincere concern. It makes employees feel seen as people, not just employees.



What is Malasakit?

Malasakit (*mah-lah-SAH-kit*) is a unique Filipino value that has no direct English translation. It means caring about someone *so deeply* that you treat their problems as your own. Not just feeling sorry for them. Actually doing something about it.

When managers lead with malasakit, Filipino employees feel seen, safe, and supported enough to speak up and give their best.

Explicitly Invite Questions

Do **not** assume employees will ask if something is unclear. They may not, out of respect for your time or authority. Make it **explicit** and make it **routine**.

Sample language you can use:

Manager: *I want to make sure we are fully aligned. What questions do you have so far?*

Manager: *There are no wrong questions here. What feels unclear?*

Manager: *What questions are you hesitant to ask? I want to hear those especially.*



How to Build Trust and Create a Safe Space

Normalize Mistakes During Learning



Filipino employees may be especially reluctant to make mistakes in front of authority. Set the tone early that mistakes during the learning period are expected and useful.

Manager: *In your first 30 days, your job is to learn. Making mistakes is part of that. What matters is that we catch them early and figure it out together.*

Follow Verbal Discussions With Written Summaries

After any key conversation, send a brief written summary. This removes the risk of misinterpretation and gives employees a reference point they can return to without having to ask again.

Example follow-up message after a check-in:

Manager: *Great chat earlier. Just summarizing what we covered: [key points]. Your priorities for this week are [tasks]. Let me know if anything feels unclear.*



How to Build Trust and Create a Safe Space

Ask Employees to Explain Their Understanding Back

Do not just ask if something is clear. That will almost always get a yes. Instead, ask them to explain it back to you.

Manager: *Can you walk me through how you are thinking about this task? I want to make sure we are on the same page.*

Manager: *What are your next steps after our conversation today?*

Manager Outcomes When Done Well

When trust and clarity are established early:

- Fewer late escalations and surprises.
- Reduced miscommunication and rework.
- Issues addressed closer to the root cause.

When trust is present, managers spend less time firefighting and more time leading.





The 1-6 Month Manager Journey at a Glance



Timeline	Manager Priority	What It Achieves
Month 1: Clarity	Set expectations, explain the role, establish communication rhythms	Reduces uncertainty and builds early confidence
Months 2-3: Alignment	Set SMART + Impact goals, monitor progress, provide structured feedback	Ensures alignment on expectations and performance standards
Months 4-5: Ownership	Increase independence, assess readiness, reinforce accountability	Builds confidence and operational reliability
Month 6: Confirmation of Employment	Conduct formal performance review and confirm permanent employment	Ensures fair, evidence-based employment confirmation decisions

Manager Tip | When clarity and trust are built early, employees speak up sooner, alignment happens faster, and performance becomes more predictable.





Manager-Guided Operational Cycle: Day 0 to Month 6

Timeframe	Manager Focus	What Must Happen	Key Tools
Month 0-1	Foundation and Safety	Onboarding walkthrough, vision and role context, culture and values alignment, weekly check-ins	Onboarding Checklist, Vision Script, Culture and Core Values Guide
Month 2-3	Alignment and Confidence	Goal setting (SMART + Impact), bi-weekly check-ins, 30/60-day performance feedback	Goal Setting Template, KPI Guide, Performance Discussion Guide
Month 4-5	Ownership and Growth	Monthly check-ins, early readiness assessment, permanent employment trajectory review	Check-In Guide, Performance Evaluation Form
Month 6	Confirmation of Permanent Employment	Performance evaluation, confirmation discussion, clear outcome and next steps	Performance Evaluation Form, Confirmation of Permanent Employment Notice

In the Philippines, employees undergo a probationary period of up to six months. At the end of this period, managers conduct a formal review to determine whether employment will be confirmed on a permanent basis. This is commonly referred to locally as "regularization."

In this toolkit, we use the term Confirmation of Permanent Employment for clarity and global consistency.



TOOL 01

Onboarding Checklist for Managers

Day 0-30 | Manager Focus: Create clarity, predictability, and early trust.



Silence in the first month often signals hesitation. Filipino employees may avoid asking questions to maintain harmony or avoid seeming like a burden to their manager.

Employees are silently asking: "How supported will I be here?"

Recommended Check-In Cadence

Period	Format	Purpose
Month 1	Weekly 1:1s (30-45 minutes)	Clarity, reassurance, early course-correction
Months 2-3	Bi-weekly 1:1s	Performance alignment, confidence-building
Months 4-6	Monthly 1:1s	Growth, ownership, permanent employment readiness

Manager Tip

Frequent check-ins early reduce rework and anxiety later. They're an efficiency tool, not a time cost.



What to Cover in the First 30 Days

- Role scope and priorities.
- Tools, workflows, and expectations.
- Communication norms and response times.
- Core values and behavioral expectations.
- What success looks like in the first 3-6 months.
- Key performance targets and how they will be evaluated.
- How Confirmation of Permanent Employment works.

Manager Tip

Clarity in Month 1 prevents confusion in Month 4.





Onboarding Checklist: Manager Guide (Day 0-30)

Use this checklist in your first 30 days with a new employee. Tick each item off as you complete it.

A. Role and Expectations

- Review role scope and key responsibilities.
- Clarify 90-day priorities.
- Explain how success will be measured (targets and behaviors).
- Share core values and what they look like in practice.
- Confirm the employee understands their key deliverables for Month 1.

B. Communication and Workflow

- Review tools and workflows.
- Define response time expectations.
- Clarify escalation paths.
- Introduce Organization Points of Contact.
- Confirm preferred communication channels (email, Slack, etc.).

C. Relationship and Safety

- Schedule weekly 1:1s for Month 1.
- Explicitly invite questions in your first conversation.
- Share feedback norms (private vs. public recognition and correction).
- Normalize mistakes during the learning period.
- Send a written summary after your first 1:1.

Starter Conversation Prompts

Use these in your first few check-ins to open dialogue and build psychological safety.

- 1. Check for clarity:** *"What feels clear so far? What feels unclear?"*
- 2. Surface hidden questions:** *"What questions are you hesitant to ask? I really want to hear those."*
- 3. Build confidence:** *"What would help you feel more confident this month?"*
- 4. Set relationship norms:** *"Is there anything about how we work together that you would like to understand better?"*
- 5. Get a temperature read:** *"On a scale of 1-5, how clear do you feel about your priorities right now? What would move that number up?"*



Reminder

Silence does not equal alignment. Follow up in writing after every key discussion.



TOOL 02

Vision Setting

Team and Business Overview | Vision-Setting Script

Manager focus: Help employees understand how their work fits into the bigger picture.

Manager Tip



You don't need a polished deck. A clear explanation of why the role exists and what success looks like is enough to build ownership.



Without context, Filipino employees may focus on task completion over impact, and hesitate to suggest improvements.

Why Vision Setting Matters

Filipino employees show higher commitment when they see how their role contributes to team success, client outcomes, and business impact. Vision setting reduces task-only thinking and increases ownership.

Without Vision Setting 	With Vision Setting 
Employees focus on completing tasks	Employees understand the impact of their work
Improvements are rarely suggested	Employees proactively flag better ways of doing things
Employees hesitate to take initiative	Employees feel empowered to act
Work feels transactional	Work feels meaningful and connected to a larger purpose



Vision Setting Script

Use this script in your first week with a new employee. Adapt it to your team and business context.

Step 1: The Big Picture

Manager: *Our team is responsible for [describe the team's core function and output]. We exist because [explain the business reason the team exists].*

Step 2: Why It Matters

Manager: *Our work impacts the business and our clients by [describe the direct business or client impact]. When we do this well, [describe what happens as a result].*

Step 3: Your Role in That Impact

Manager: *Your role contributes by [describe how this specific role creates value]. The work you do makes a difference because [connect their tasks to the bigger outcome].*

Step 4: What Success Looks Like in the First 6 Months

Manager: *In the first six months, strong performance will look like [describe specific, observable behaviors and results]. You will know you are on track when [describe indicators of success].*

Step 5: What I Expect From You

Manager: *Here is what I expect from you as we work together: proactive and open communication, early flagging of concerns before they grow, willingness to ask clarifying questions, and active participation in team discussions. Your voice matters here.*

After the Vision Conversation

Once you have shared the vision, check for genuine understanding.

Manager: *How does your role connect to what we just discussed? Can you walk me through it in your own words?*

Manager: *What part of what I shared resonates most with you?*

Manager: *Is there anything you want to understand better about the team or the business?*

TOOL 03

Culture and Values Alignment

Behavioral Expectations | Manager Focus: Make how we work together explicit.

Manager Tip

Clearly naming behavioral expectations creates safety. It doesn't reduce respect for leadership.



If expectations around speaking up or challenging ideas are not stated, employees will default to silence to preserve harmony.

Sample Manager Language for Culture Setting

Make questions safe: *On this team, asking questions and raising concerns early is encouraged. It helps us prevent issues later. There is no such thing as a bad question here.*

Make disagreement safe: *If you disagree with a direction, I want to hear it. You can come to me directly, or raise it in our 1:1. The way we disagree matters though. Let's be direct, respectful, and focused on what is best for the team and the client.*

Set feedback as two-way: *Feedback goes both ways here. I will give you feedback regularly and privately unless it is a recognition moment, in which case I will share it with the team. I also want feedback from you on how I can support you better.*



A. Meeting Participation

Expectation	How We Do It on This Team
Level of participation in meetings	
How to raise a concern in a meeting	
How to disagree respectfully	
What happens if you are not sure	

B. Feedback Norms

Norm	How We Do It on This Team
How recognition is given (public vs. private)	
How correction is given (public vs. private)	
How often feedback is shared	
How to give feedback to your manager	

C. Ownership and Escalation

Situation	What to Do
Decisions you can make independently	
Situations that require manager input	
Situations that require escalation	
Who to contact when your manager is unavailable	



TOOL 04

Goal Setting (SMART + Impact)

Manager Focus: Translate expectations into clear, achievable goals.

Why SMART + Impact?

Most goal-setting frameworks stop at SMART. That tells employees what to do. The Impact layer tells them why it matters.

When employees understand both, they take more ownership, make better decisions, and stay more engaged when things get hard.

Manager Tip

Always pair goal-setting with a capacity check to prevent silent burnout.

A quick yes may reflect politeness or effort, not true capacity. Filipino employees may agree to unclear or unrealistic goals out of respect.





The SMART + Impact Framework

Component	The Question It Answers	Example
Specific	What exactly is expected?	Complete client onboarding documentation for all new accounts within 5 business days of contract signing.
Measurable	How will success be tracked?	100% of onboarding docs submitted on time, tracked in the project management tool.
Achievable	Is this realistic given workload and resources?	Confirmed with employee that current workload allows for this target.
Relevant	Does this align with team or business priorities?	Directly supports our client satisfaction and retention targets.
Time-bound	When must this be completed?	Ongoing target, reviewed quarterly.
Impact	Why does this goal matter?	Late onboarding documentation delays client go-live and damages trust. Getting this right reduces escalations and strengthens the client relationship.





SMART + Impact Goal Template

Use this template for each goal. Complete all fields before finalizing with the employee.

Goal Title

Specific Outcome (What exactly needs to happen?):

Success Metric (How will we measure it?):

Timeline (By when?):

Business / Client Impact (Why this matters):

Dependencies / Support Needed:



Capacity and Alignment Check

Complete this before finalizing any goal. Because yes may reflect politeness rather than true capacity, always have this conversation explicitly.

Current workload considerations:

Competing priorities:

Employee confidence level (1-5, where 5 = fully confident):

What support is needed to succeed?

Reminder

Confirm goals verbally during discussion and follow up in writing to prevent misalignment.

Ask: "Can you walk me through how you plan to approach this goal?"



TOOL 05

1-6 Month Check-In Guide

Manager Focus: Normalize feedback and reduce uncertainty.

Month 1: Clarity and Confidence

The goal of Month 1 check-ins is to reduce uncertainty and build early trust. Keep these conversations warm, specific, and forward-looking.

Check-in Prompts

Manager: What feels clear so far?

Manager: What feels overwhelming or uncertain?

Manager: What support would help you most this week?

Manager: Is there anything you have been hesitant to ask?

Manager: How are you finding the team and the working environment so far?

What to Watch For

- Vague or brief answers. These may signal the employee is holding back.
- Consistently positive responses with no concerns raised. Probe gently.
- Signs of overload: longer hours, quieter participation, delayed responses.





Months 2-3: Alignment

The goal of Months 2-3 check-ins is to ensure goals are clear, performance is on track, and any early blockers are surfaced before they grow.

Check-in Prompts

Manager: How is progress toward your goals this month?

Manager: Are there any blockers I can help you remove?

Manager: Is your current workload sustainable? What is feeling heavy?

Manager: Is anything unclear about expectations or priorities?

Manager: What has gone well that we should keep doing?

What to Watch For

- Goals that are consistently described as on track but with no specifics. Ask for evidence.
- Workload concerns that only come out when asked directly.
- Hesitation before answering, which may signal an unspoken concern.





Months 4-6: Ownership

The goal of Months 4-6 check-ins is to build independence, assess readiness, and prepare for the Confirmation of Permanent Employment discussion.

Check-in Prompts

Manager: What can you handle fully independently now?

Manager: Where do you still want more guidance or support?

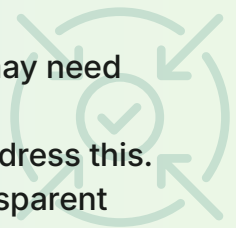
Manager: Where do you want more challenges or complexity?

Manager: How are you feeling about your growth here over the past few months?

Manager: Is there anything about your role or the team that you would like to change or improve?

What to Watch For

- Employees who still hesitate to make decisions independently. They may need more explicit permission.
- Employees who are performing well but have not been recognized. Address this.
- Concerns about the permanent employment review surfacing. Be transparent about the process.





Check-In Tracker

Use this to document key takeaways from each check-in. Keep it brief but consistent.

Date	Check-In Focus	Key Takeaways	Actions Agreed	Follow-Up Done
	Month 1			
	Month 1			
	Month 2			
	Month 2			
	Month 3			
	Month 4			
	Month 5			
	Month 6			





TOOL 06

Organization Points of Contact

Manager Focus: Reduce hesitation around escalation and support.

Manager Tip

Explicitly encourage appropriate escalation. It prevents small issues from becoming larger problems.



Filipino employees may hesitate to reach out beyond their manager due to respect for hierarchy. They need explicit permission and clear direction on who to contact.

Why This Matters

Clear points of contact reduce delays in resolving issues and prevent small problems from becoming large ones. When employees know exactly who to reach out to, and feel safe doing so, they stop absorbing problems in silence.

Organization Points of Contact Guide

Fill in this template and share it with every new employee in their first week. Update it whenever contacts change.



Concern Type	Contact Person	Channel	Expected Response Time
HR questions	[HR POC Name]	Email	1-4 working days
Payroll and benefits	[Payroll POC Name]	Email	1-4 working days
IT concerns	[IT POC Name]	Email	1-2 working days
Escalations	[Client Identified POC]	Email / Collaboration Platform	1 working day
Direct manager	[Your Name]	[Your preferred channel]	[Your response time]
Backup when manager unavailable	[Backup Name]	[Channel]	[Response time]

SLA may vary depending on the nature of the issue raised.

How to Introduce the POC Guide

Manager: *I want to make sure you always know who to reach out to, and that you feel comfortable doing so. Here is a guide of who handles what. You should never feel like you have to figure something out alone or wait for me if someone else can help you faster.*

Manager: *If you are ever unsure who to contact, just message me and I will point you in the right direction.*





TOOL 07

Performance Discussion Guide

Manager Focus: Deliver feedback that is clear, respectful, and constructive.

Manager Tip

Open performance conversations by framing them as alignment and support, not judgment.



Tone and delivery matter as much as content. Public correction or abrupt feedback can damage trust quickly and take a long time to repair.

This guide should be used alongside the official Performance Evaluation Form. It is designed to help managers run structured, clear, and culturally aware performance conversations at any point in the 1-6 month journey.

Step 1: Pre-Discussion Preparation

Before the conversation, review:

- Agreed goals and KPIs.
- Performance metrics and outputs.
- Behavioral competencies (how the work was done, not just what was delivered).
- Prior feedback given.
- Development commitments.
- Any documented performance concerns.

Ensure your rating is:

- Based on patterns, not isolated incidents.
- Consistent with the official 1-5 definitions.
- Defensible if reviewed later.



Step 2: Open the Conversation

Start personal. Build the relationship before discussing performance. This is a two-way conversation, so be ready to share something yourself.

*Manager: How are you? How was your weekend?
Manager: Why was that significant to you?
(Share something personal about your own week as well. This models openness.)*

Step 3: Set Context

Manager: This discussion is about alignment and growth. I want this to be a two-way conversation. I will share observations based on what I have seen, and I want to hear your perspective too. Feedback is based on what I have observed, and questions are encouraged throughout.

Step 4: Review Goals and KPIs (Performance: What)

Discuss goal by goal. For each goal:

- Restate the agreed target.
- Review actual results.
- Assign a rating using the 1-5 scale.
- Explain the evidence behind the rating.

Rating	Description	What It Looks Like
5: Exceptional	Far exceeds expectations	Exceeds all goals consistently; role model behavior; often helps others reach their goals too.
4: Exceeds	Often exceeds expectations	Consistently high-quality output; takes initiative; goes beyond what is asked.
3: Meets	Consistently meets expectations	Completes all assigned tasks reliably; meets deadlines; delivers quality work.
2: Needs Improvement	Below expectations	Requires frequent coaching or follow-up; some targets missed; improvement plan may be needed.
1: Unsatisfactory	Fails to meet expectations	Goal achievement is minimal; frequent errors or missed deadlines; formal intervention required.

Manager: How do you assess your own performance on this goal? Walk me through how you are thinking about it.



Step 5: Review Behavioral Competencies (Performance: How)

Use the same 1-5 scale to rate each competency area:

- Communication.
- Collaboration.
- Initiative.
- Accountability.
- Alignment with team values.

For each area, discuss: specific examples, positive impact, improvement areas, and patterns observed. Focus on behavior and observable outcomes. Avoid personality-based statements.

Step 6: Capacity and Sustainability Check

This step is especially important for Filipino teams. Employees may absorb overload in silence rather than raise concerns.

- Manager:** *Were there moments where the workload felt too heavy?*
- Manager:** *Did you hesitate to raise concerns at any point? What held you back?*
- Manager:** *Is anything currently unclear about expectations or priorities?*

This prevents: silent burnout, overcommitment, and late escalation.

Step 7: Development and Growth

Before finalizing ratings, shift the conversation forward. Co-create next steps with the employee.

Rating Range	Development Focus
Ratings 4-5	Stretch opportunities and leadership exposure. What bigger challenges are they ready for?
Rating 3	Skill refinement and consistency. What would move them from reliable to exceptional?
Ratings 1-2	Clear improvement plan with timeline. What specific behaviors need to change, and by when?

Manager: *Based on what we discussed, here are the areas we can strengthen and build on. I want us to work on this together. What support do you need from me?*



Step 8: Summarize Overall Rating

- Provide the overall rating and clear rationale.
- State expectations moving forward.
- Confirm alignment with the documented evaluation form.

Step 9: Close With Clarity

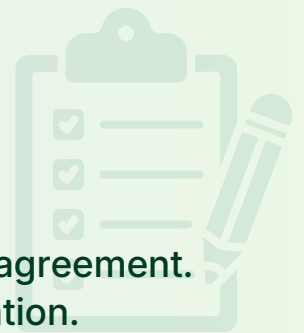
Manager: *How does this feedback land for you?*

Manager: *What questions do you have?*

Manager: *Let me summarize what we agreed on today and I will send this to you in writing after our conversation.*

Manager Reminders (Kapwa-Informed)

- Deliver feedback calmly and respectfully.
- Correct privately. Recognize publicly.
- Be direct, but not abrupt.
- Invite questions explicitly. Do not assume silence means agreement.
- Pause and check understanding throughout the conversation.





TOOL 08

30 / 60 / 90 / 180-Day Evaluation

Confirmation of Permanent Employment | Manager Focus: Close the onboarding loop with documented performance evidence.

Manager Tip

There should be no surprises at the 180-day stage. The final outcome should reflect patterns already discussed, documented, and aligned throughout the first six months.

The six-month review marks the formal decision point for confirming permanent employment. This decision should reflect a progression of documented conversations held at 30, 60, and 90 days, not a single isolated assessment.

Individual KPI Planning Sheet

Use the Performance Evaluation Form at each checkpoint to:

- Assess goals and KPIs using the 1-5 rating scale.
- Evaluate behavioral competencies (how work is done, not just what is delivered).
- Document observable evidence. Ratings must align with specific examples.
- Identify performance trends: improving, stable, or declining.
- Clarify expectations and next steps.





Tracking Performance Across Checkpoints

Checkpoint	Focus	Key Question
30 Days	Onboarding trajectory and clarity. Ratings may reflect the learning curve and adjustment period.	Is the employee building the right foundations?
60 Days	Alignment and capability growth. Identify early risk signals or skill gaps.	Is the employee on track with expectations?
90 Days	Stability and increasing independence. Performance should show growing consistency.	Is the employee developing the right behaviors?
180 Days	Sustained performance and behavioral alignment. Ratings must reflect consistent results and readiness for employment confirmation.	Is this employee ready for permanent employment?

A 180-day confirmation decision should not be based on potential alone. It should be based on demonstrated, repeatable performance.

Confirmation of Permanent Employment Decision

At the end of the first 6 months, determine which of the following applies. The decision must align with documented ratings, prior feedback discussions, performance consistency, and behavioral alignment with core values.





Decision Options

- Confirm Permanent Employment
- Extend Evaluation Period (if legally permitted)
- Do Not Confirm Employment (Unsuccessful Probationary)

Evidence-Based Rationale (required for all decisions):

Business Impact of Doing This Well

When Done Well	The Result
Evaluations are consistent and documented	Early risks are addressed before escalation.
Managers reduce reactive performance issues	Decisions are defensible and fair.
Employee trust in leadership increases	Long-term performance becomes more predictable.
Retention improves	Teams are more stable and capable over time.





MANAGER SELF-CHECK

180-Day Leadership Checkpoint

Before Month 6, ask yourself these questions honestly. This is not about being a perfect manager. It is about being a consistent one.

Safety and Dialogue

- Have I made it safe to ask questions from Day 1?
- Have I explicitly invited questions, or just assumed employees would ask?
- Have I responded calmly when concerns were raised, so employees will raise them again?

Clarity and Expectations

- Have I clarified expectations, or assumed they were understood?
- Have I followed up in writing after key conversations?
- Have I checked for genuine understanding, not just a yes?

Capacity and Wellbeing

- Have I checked capacity, not just accepted yes when asking about workload?
- Have I watched for signs of silent burnout or overcommitment?
- Have I celebrated wins, both big and small?

Documentation

- Have I documented feedback conversations consistently throughout the six months?
- Is the 180-day decision based on patterns of evidence, not a single assessment?
- Can I defend my rating if it is reviewed?

This stage determines whether your team becomes quiet and compliant, or confident, proactive, and invested. The difference is in how you led the first six months.



Outcome of This Stage

When managers follow this guided cycle consistently:

- Faster role stabilization and productivity.
- Earlier identification of risks, reducing escalation.
- Fewer misunderstandings and less rework.
- Increased employee initiative and ownership.
- Clear, defensible permanent employment decisions.
- Stronger retention and more predictable team performance.

Psychological safety is not just cultural. It directly improves delivery, efficiency, and scalability. It is an optimization strategy, not a soft initiative.





QUICK REFERENCE

Module 03 at a Glance

Use this summary page as a quick reference throughout the first six months.

Month	Priority	Key Actions	Tools to Use
Month 1	Clarity and Safety	Onboarding checklist, vision setting, culture and values alignment, weekly check-ins, written follow-ups	Onboarding Checklist, Vision Script, Culture and Values Template, POC Guide
Month 2	Alignment	Set SMART + Impact goals, bi-weekly check-ins, 30-day performance feedback	Goal Setting Template, KPI Sheet, Performance Discussion Guide
Month 3	Alignment	60-day performance feedback, goal review, capacity check	Performance Evaluation Form, Check-In Guide
Month 4	Ownership	Monthly check-ins, increase independence, early readiness assessment	Check-In Guide, Performance Evaluation Form
Month 5	Ownership	Monthly check-ins, development conversations, permanent employment trajectory review	Check-In Guide, Performance Evaluation Form
Month 6	Confirmation	180-day performance evaluation, confirmation of permanent employment discussion, clear outcome and written summary	Performance Evaluation Form, Confirmation Notice



Documents and Tools Referenced in This Module

Tool	When to Use
Onboarding Checklist (Day 0-30)	First week with every new employee.
Vision-Setting Script	First week. Explain the big picture and the role's impact.
Team Culture and Values Template	First week. Make behavioral expectations explicit.
SMART + Impact Goal Template	Months 2-3 and ongoing for quarterly goal alignment.
Individual KPI Planning Sheet	Months 2-3. Set and track key performance indicators.
1-6 Month Check-In Guide	Every check-in throughout the six-month period.
Check-In Tracker	After every check-in. Document key takeaways and actions.
Organization POC Guide	First week. Share with every new employee.
Performance Discussion Guide	30, 60, 90, and 180-day performance conversations.
Performance Evaluation Form	30, 60, 90, and 180-day formal evaluations.
Confirmation of Permanent Employment Notice	Month 6. Formal documentation of the employment decision.

The Filipino Offshore Leadership System

Module 01 | The Filipino Offshore Leadership System

Module 02 | The Employee Relationship Cycle

Module 04 | Performance Management

Module 05 | Employee Engagement

Module 06 | Career Management

Module 07 | Total Rewards and Compensation

Module 08 | Employee Relations & Labor Management

Module 09 | Offboarding in the Philippines





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