

Onboarding Checklist

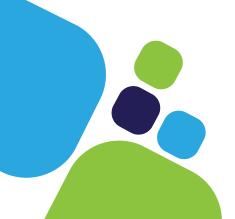
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New Hire Onboarding Checklist

Use this checklist to guide a new hire's onboarding experience across key phases of their first 90 days. This is a sample that can be used for a Customer Service Representative.

Customize this as needed for your company needs and role.

- Preboarding (Before Day 1)
- Send welcome email with start date, time, location/map and dress code
- Set up email, computer, phone and access to internal systems
- Enroll new hire in LMS onboarding path
- · Assign onboarding buddy/mentor
- Send "Meet the Team" intro and welcome message from leadership
- · Prepare workstation and necessary equipment
- Share Day 1 agenda and what to expect
- Week 1:
 Orientation &
 Foundation
- Company overview and mission, vision and values
- HR policies and compliance training (via LMS)
- Intro to benefits, PTO, payroll, time tracking
- Office tour or virtual walkthrough
- Meet the team: introductions with key coworkers
- Role overview: supervisor-led walk-through of core responsibilities
- Begin role-specific LMS learning track (Day 1–3)
- Setup in CRM/ticketing system and observe live tickets/calls
- Schedule 30-, 60-, and 90-day check-ins





Weeks 2–4: Skills Building & Integration	 Shadow senior customer service reps on live calls/chats Practice using ticketing system (sandbox environment) Complete product/service training modules in LMS Attend team standups or department meetings Begin handling lower-risk tickets or internal practice scenarios Weekly 1:1 with manager for feedback and Q&A Culture reinforcement: review values-based scenarios in LMS Submit first evaluation quiz or role-play session
☐ Month 2: Confidence & Contribution	 Gradually take ownership of real customer inquiries Complete advanced training (de-escalation, empathy, policy nuance) Participate in peer feedback session or group Q&A Meet with mentor to review progress and reflect on experience Midpoint LMS milestone: review completion rate and assessment scores Evaluate progress toward 30-day goals; adjust 60-day goals if needed
Month 3: Autonomy & Growth	 Handle full ticket/call volume with minimal supervision Participate in a team project or process improvement suggestion Attend cross-departmental learning or shadowing opportunity Complete 90-day self-evaluation and goal-setting

discussion

recognition)

upskilling modules

• Final LMS training check-in: review optional

Celebrate completion of onboarding program (team)



Sample Role-Specific Onboarding Plan: Entry-Level Customer Service Rep

Timeframe	Focus Area	Activities
Preboarding	Setup and Welcome	Equipment ready, LMS access, intro to team and mentor
Week 1	Orientation	Company values, HR policies, CRM overview, soft skill basics
Week 2	Tools and Process	Ticketing practice, product knowledge training, first internal tickets
Week 3	Guided Practice	Shadowing, soft skill coaching, live ticket support with supervision
Week 4	Initial Autonomy	Handle basic tickets solo, manager debrief, team meeting participation
Month 2	Advanced Scenarios	De-escalation, policy exceptions, culture scenarios, first KPIs tracked
Month 3	Full Ramping and Contribution	Full case ownership, self- evaluation, optional training, recognition