# Onboarding Checklist

Date: ____________________

**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.

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☐ **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
- Final LMS training check-in: review optional upskilling modules
- Celebrate completion of onboarding program (team recognition)

**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 |