

Retail Employee Onboarding Checklist

Use this onboarding checklist to ensure your new employees have an efficient and successful onboarding experience when joining your retail store.



DOCUMENTS & SET UP

- Employee folder created (paper and/or digital)
- Employee has complete W-9 and other employment documents
- Employee has provided direct deposit/bank information
- Employee has provided all relevant contact information
- Employee has received welcome packet and training documents/manual
- Employee has received a copy of the employee handbook
- Company culture documents (include dress code, professional ethics and the code of conduct)
- Give an overview of the store, mission, and goals
- Compensation and benefits documents
- Job description and responsibilities
- Business cards have been ordered
- Name tag has been created and ordered
- Employees email has been set up
- Employee is set up in your systems (payroll, scheduling, etc)
- New schedule has been provided
- New hire introduction to other employees

EMPLOYEE TRAINING

- TRAINING MATERIALS (Walk employee through training manual (or videos))
- REGISTER TRAINING (Set up training on register training, customer communication, packaging, etc)
- PRODUCT KNOWLEDGE (Set up training and overview of company product, service, etc)
- TRAINING SHIFTS (Set up first shifts for on-the-job training)
- TEAM TRAINING (Partner with another employee to assist with training)
- CUSTOMER SERVICE APPROACH (Set up practice customer service examples including problem-solving skills, returns/exchanges, creativity, resourcefulness, empathy, etc)
- FLOOR TRAINING (walk the employee through greeting customers, helping customers, fitting rooms, folding clothes, cleaning, displays, etc.)

CONTINUED TRAINING

- EMPLOYEE FIRST SHIFT RUN (assist with customers, fitting rooms, folding clothes, cleaning, etc)
- EMPLOYEE SECOND SHIFT RUN (register training with another employee)
- EMPLOYEE DISPLAY TRAINING/SHIPMENT (follow manual and guidelines for displays and new merchandise)
- FEEDBACK (things to review/work on)
- ADDITIONAL TRAINING (additional assignments, test runs, etc)
- PRAISE (positive feedback/boost confidence)
- QUESTIONS AND CONCERNS (let new employee give feedback or ask questions)
- SET PERFORMANCE GOALS
- CHECKINS (one month, three month, six month)
- EMPLOYEE REVIEW AND QUESTIONNAIRE (3, 6 ,9 ,and 12 months)

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