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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