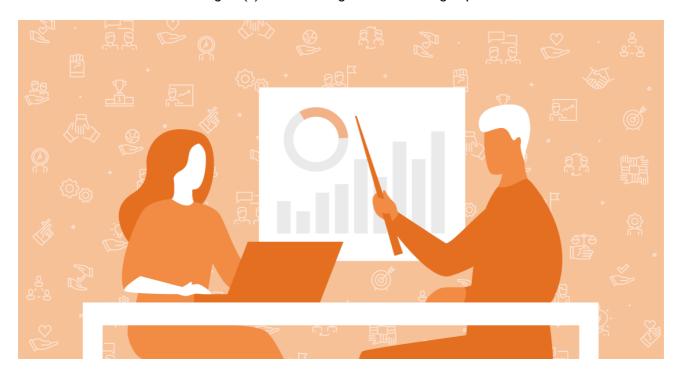
## **Onboarding Process: Customer Service Agent**

It's important that each one of your customers has a personalized and unique experience. That's why your customer service needs to be the best. Follow these processes to ensure your new customer service agent(s) has/have a great onboarding experience.



## **DOCUMENTS & SET UP**

	Set up agent software tools and communication
	Contract agreement
	W-9 or W-2
	Welcome packet and orientation packet
	Company culture documents (include professional ethics and the code of conduct)
	Compensation and benefits documents
	Job description and responsibilities
	New hire training manual
	New hire introduction to other employees
CUSTOMER SERVICE TRAINING	
	CUSTOMER SERVICE SOFTWARE (Set up training on customer service software tools and communication)
	TEAM TRAINING (Partner with another agent to assist with training)
	PRODUCT KNOWLEDGE (Set up training and overview of company product, service, etc)
	CUSTOMER SERVICE SOFTWARE (Walk agent through customer service software)
	TRAINING MATERIALS (Walk agent through training manual (or videos))

CUSTOMER SERVICE APPROACH (Set up practice customer service examples including problem solving skills, creativity, resourcefulness, empathy, etc)
CUSTOMER SERVICE SCRIPTS (Walk agent through customer service scripts)
CUSTOMER SITUATIONS (Walk agent through call stages and how to approach customer situations)
BEST PRACTICES Walk agent through the dos and don't with customers
CRISIS MANAGEMENT/CONFLICT RESOLUTION (Walk agent through crisis management training and conflict resolution exercises (what to do and not to do))
CUSTOMER SERVICE PHONE TRAINING (tone, speak clearly and slowly, etc)
CONTINUED TRAINING
AGENT TEST RUN (partner will assist with calls/emails)
FEEDBACK (things to review/work on)
ADDITIONAL TRAINING (additional assignments, test runs, etc)
CUSTOMER SERVICE GAMES (practice scenarios)
PRAISE (positive feedback/boost confidence)
QUESTIONS AND CONCERNS (let new agent give feedback or ask questions)
SET PERFORMANCE GOALS
CHECKINS (one month, three month, six month)
EMPLOYEE REVIEW AND QUESTIONNAIRE (give agent onboarding survey)  Make and Share Free Checklists  checkli.com