

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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