

Employee _____ Role _____ Start date _____

Buddy or manager _____

Onboarding From the signed contract to answering customers alone

TASK	DUE	DATE	INITIALS
Before day 1			
☐ Sign the contract and a confidentiality agreement covering customer data	Before day 1		
☐ Create their own logins for the help desk, store admin and chat, with only the access the role needs Never share one login between people. Their own account shows who did what, and can be closed when they leave.	Before day 1		
☐ Set up two-step verification on every account	Before day 1		
Week 1			
☐ Walk through the products, best sellers and the questions customers ask most	Week 1		
☐ Go through your tone of voice, saved replies and response time targets	Week 1		
☐ Show how to find an order, track a parcel and update an address	Week 1		
☐ Train them on the returns and refunds procedure	Week 1		
Limits and escalation			
☐ Agree what they can do alone, such as refunds or discounts up to a set amount	Week 1		
☐ Explain when and how to escalate, such as chargebacks, injuries, threats and press	Week 1		
☐ Explain how to handle customer data and spot phishing or fraud attempts	Week 1		
Supervised replies			
☐ Draft replies for a lead to check before they're sent	Weeks 1 to 2		
☐ Answer live tickets alone once the lead signs them off	Week 2		
End of month 1			
☐ Review a sample of their tickets, response times and customer ratings with them	End of month 1		
☐ Agree what to learn next, such as wholesale or marketplace orders	End of month 1		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____