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)

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