On-the-Job Checklist Example

Customer Service Representative On-the-Job Checklist		
	Instructor-Led Recap (areas covered)	
	Functional Role Knowledge	Systems and Applications
Day 1	• Customer Service Department Organization Chart • Customer Onboarding Process • Cross-Functional Partner Departments	CommsUp Now background, uses, dashboard navigation simulation E-Account FileSuite background, uses, account lookup navigation simulation

Training Checklist Walkthrough

Part I: Daily Recap of ILT content covered:
helps decrease double work.

This is an example of the on the job training a new hire undergoes with a mentor on Day 1 of functional onboarding. New hires sit down with their functional mentor daily to complete items on this checklist which align with content covered during the

Instructor-Led course portion of the program. This helps guide mentors to train on department specific information, skipping cursory information and cutting down on retraining the same topics.

Corresponding with the course level progression built into the Instructor-Led training course, the on- the-job training checklist increases in complexity as the new hire progresses through the onboarding program.

		Systems-Based Training *Lead by Customer Service Analyst*		
		Inbox Presets	Complete?	
	Comms Up Now	Daily Dashboard Settings	☐ yes	☐ no
		Customer Inbox	☐ yes	☐ no
		Address Book	☐ yes	☐ no
		Hot Keys	☐ yes	☐ no
		Dialogue: Ask new hire why they might use hot keys for daily workflow. Explain business need through response standardization	☐ yes	☐ no
Day 1 (cont'd)	E-Account FileSuite	Customer Orders	Complete?	
		Order Lookup	☐ yes	☐ no

		Anatomy of Order	☐ yes	☐ no
		Order Rescheduling	☐ yes	☐ no
		Basic Order Adjustments	☐ yes	☐ no
		Dialogue: Review Order Rescheduling/Revision Process. Ask new hires which cross-functional departments to check in with prior to order revision based on need. Ask new hires reason why. Explain context if necessary.	☐ yes	☐ no

Notes

Software application and training beyond simulations

Introducing applications and uses earlier in the onboarding day allows for a more enriching experience with their department mentor. Additionally, mentors reviewing more complex tasks rather than new hires learning task steps through a simulation improves learning retention and transfer. Facetime with a team member sharing instances and anecdotes contextualizes tasks beyond clicks.