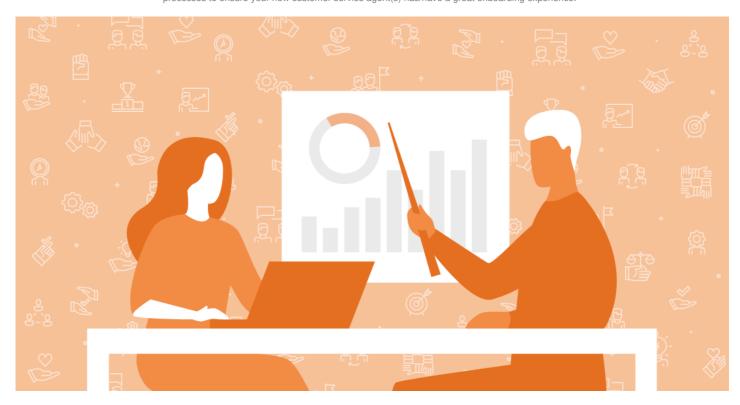# Onboarding Process: Customer Service Agent

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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