

# Employee Training Checklist

A role training plan covering modules, shadowing, certifications, and evaluation for new employees.

## Plan the Training

- ☐ Define the skills and knowledge the role requires
- ☐ Break the requirements into clear training modules
- ☐ Set learning objectives and success criteria for each module
- ☐ Sequence topics from foundational to advanced
  - Build later skills on earlier ones.
- ☐ Assign a trainer or mentor responsible for each area
- ☐ Create a realistic timeline with milestones

## Deliver Core Modules

- ☐ Cover company tools, systems, and core processes
- ☐ Teach role-specific procedures step by step
- ☐ Provide reference guides and documentation to revisit
- ☐ Mix instruction with hands-on practice tasks
- ☐ Check understanding after each module before moving on
- ☐ Adjust pace based on the employee's progress
  - Slow down on tough topics rather than rushing.

## Arrange Job Shadowing

- ☐ Pair the employee with an experienced colleague
- ☐ Schedule shadowing sessions across key tasks
- ☐ Encourage questions and note-taking during observation
- ☐ Gradually let the employee perform tasks with support
- ☐ Have the mentor give immediate, specific feedback
- ☐ Move toward independent work as confidence grows
  - Reduce supervision step by step.

## Complete Certifications

- ☐ Identify certifications or compliance training the role needs
- ☐ Enroll the employee in required courses or programs
- ☐ Schedule any safety or regulatory training on time
  - Required training varies by role and region; follow local laws.
- ☐ Track completion dates and renewal deadlines
- ☐ Store certificates and records in the employee file
- ☐ Set reminders for recertification before expiry

## Evaluate Competency

- ☐ Assess knowledge with a quiz, test, or review
- ☐ Have the employee demonstrate core tasks unassisted
- ☐ Compare performance against the defined success criteria
- ☐ Gather feedback from the trainer and the employee
- ☐ Identify remaining gaps and assign follow-up practice

- ☐ Confirm the employee is ready to work independently

### **Follow Up and Reinforce**

- ☐ Schedule check-ins in the weeks after training ends
- ☐ Provide refresher materials for complex tasks
- ☐ Offer ongoing coaching as new situations arise
- ☐ Update the training plan based on what worked
- ☐ Recognize the employee for completing the program
- ☐ Document final training outcomes in the employee record

Keep a clear record of skills signed off.