

# 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.