

Employee Training Checklist for Small Business

Use this checklist as a starting point. Customize it for the role, industry, and level of responsibility.

First 30 Days Employee Training Checklist

Before the Employee Starts

Employee paperwork is ready

Schedule is confirmed

Uniform, tools, login, keys, or equipment are prepared

Training person is assigned

First-week schedule is written down

Job description or role expectations are shared

Basic SOPs, checklists, or instructions are available

Day 1: Welcome and Orientation

Welcome the employee and introduce the team

Explain what the business does and who it serves

Review the employee's role and responsibilities

Review schedule, breaks, time tracking, and attendance rules

Explain communication expectations

Review workplace policies and safety basics

Give tour of workspace, tools, supplies, and important areas

Explain who to ask for help

Days 2–3: Business Basics

- Explain customer service standards
- Review common customer questions
- Teach basic tools, software, or equipment
- Explain daily opening, closing, or shift procedures
- Review safety, security, and emergency procedures
- Show examples of good work and poor work
- Have employee shadow an experienced person

Week 1: Core Job Tasks

- Demonstrate the employee's most common tasks
- Have employee practice with supervision
- Correct mistakes immediately and respectfully
- Review checklist for daily responsibilities
- Teach how to document completed work
- Teach when to ask for manager or owner approval
- Confirm employee can perform basic tasks with help

Week 2: Customer Interaction and Workflow

- Have employee handle simple customer interactions
- Review tone, greeting, phone, email, or message standards
- Teach how to handle complaints or difficult situations
- Practice common scripts or responses
- Review quality standards
- Assign routine work with supervision
- Give end-of-week feedback

Week 3: Supervised Independence

Allow employee to complete routine tasks independently

Check work for accuracy and consistency

Teach common problem-solving scenarios

Review mistakes and how to prevent them

Teach upsell, follow-up, referral, or retention steps if relevant

Confirm employee understands what requires approval

Week 4: Review and Next Steps

Review performance from first 30 days

Identify strengths

Identify training gaps

Set expectations for the next 30 days

Ask employee what support they need

Update training checklist based on what was missed

Decide whether employee is ready for more responsibility