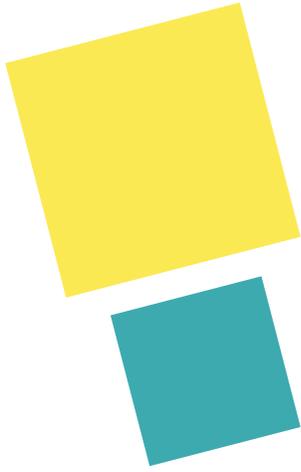


Customer Support VA Onboarding Checklist



WILDFIRE
- CONCEPTS -

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- Give them access to their new email address.
 - Send them an invite to the time tracking software you're using.
 - Invite them to use the project management software you like.
 - Get them to sign up for any team communication platform you're using.
 - Send them an email with a list of who's who in your company and how to contact their team members.
 - Check that they correctly installed the time tracking software.
 - Send out an email to your entire team welcoming your new staff member.
 - Send them an onboarding checklist so they could also check if everything is covered.
 - Discuss your expectations for the role and theirs for the job.
 - Tell them about your business objectives and where they fit in.
 - Email them links to any useful documents they should check out before getting to work.
 - Instruct them what to do when they have a question and how to ask for help.
 - Talk to them about your company's values and how to treat other on-site or virtual staff members.
 - Discuss what to do when their internet is down and can't work.
 - Tell them about any remote work perks you're offering.
 - Send them an invite, or provide them with a demo of your product/service.
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- Get them to test it out and write down their questions.
 - Ask them to go through the product/service documentation.
 - Answer their questions about the product/service.
 - Set them up with an account on the Customer Service Software / Support Ticket System / Customer Relationship Management System you're using.
 - Get them to go through past interactions/support tickets.
 - Instruct them how to answer customers using the support ticket system or the software you're using.
 - Teach them how to use the online chat, if you have one, to answer customers.
 - Teach them how to answer phone calls and record customer data, if that applies.
 - Instruct them how to ask for help.
 - Make sure they have all the login credentials they need if they'll answer client emails.
 - Discuss the best way to deal with dissatisfied clients.
 - Instruct them when and how to issue refunds.
 - Share with them any past reports other employees have prepared.
 - Instruct them how to report their activity and results to you.
 - Teach them how to reach out to the development team and provide them with reports on bugs and functionality issues experienced by clients.
 - Discuss what they should expect next: tasks and objectives for the next week and the next month.
 - Send them an initial to-do list and get them to reach out to you when they finished their first task.
 - Review their work and provide feedback.

