Customer Support VA Onboarding Checklist
- 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.
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.

- 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.

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