



Automotive Employee Onboarding Checklist


Pre-Start Paperwork & Background

Ensuring all necessary forms are completed and background checks are initiated.

Offer Letter Acknowledgment

Write something...

Proof of Identification (Driver's License, Passport)

 Upload File

Social Security Number (for payroll)

Enter a number...

Emergency Contact Relationship

- ☐ Spouse
- ☐ Parent
- ☐ Sibling
- ☐ Friend
- ☐ Other

Background Check Start Date

Enter date...

Confidentiality Agreement

IT & System Access Setup

Configuring accounts, passwords, and access to required systems and software.

Employee ID

Enter a number...

Operating System (Desktop)

- ☐ Windows 10
- ☐ Windows 11
- ☐ macOS

Operating System (Laptop)

- ☐ Windows 10
- ☐ Windows 11
- ☐ macOS

Default Email Signature

Write something...

CRM Access Level

- ☐ Read Only
- ☐ Limited Edit
- ☐ Full Access

Software Licenses Required

- ☐ Microsoft Office Suite
- ☐ Adobe Creative Cloud
- ☐ Specialized Diagnostic Software

Software License Expiration Date

Enter date...

Department Introduction & Team Integration

Facilitating introductions to team members and outlining departmental processes.

Welcome Message from Department Head

Write something...

Assigned Buddy/Mentor Name

Write something...

Team Introductions - Briefly describe each team member's role

- ☐ Sales
- ☐ Service
- ☐ Finance
- ☐ Marketing
- ☐ Parts

Brief Department Overview

Write something...

Team Lunch/Welcome Event Date (Optional)

Enter date...

Role-Specific Training – Part 1

Initial training focusing on fundamental skills and core responsibilities.

Overview of Primary Responsibilities

Write something...

Assigned Mentor/Buddy (if applicable)

☐ Yes

☐ No

Initial Software/System Access Granted?

☐ CRM

☐ Inventory System

☐ Service Management Software

☐ Parts Ordering System

Initial Product Knowledge Training Completion Date

Enter date...

Summary of Initial Customer Interaction Guidelines

Write something...

Company Policies & Procedures Review

Covering essential policies, code of conduct, and safety regulations.

Review of Employee Handbook Acknowledgement

Write something...

Data Privacy and Security Policy Acknowledgment

- ☐ Acknowledged and Understood
- ☐ Requires Clarification

Harassment & Discrimination Prevention Policy Acknowledgment

- ☐ Acknowledged and Understood
- ☐ Requires Clarification

Policy Review Completion Date

Enter date...

Employee Signature (Acknowledgement)

Role-Specific Training – Part 2

Advanced training based on the employee's specific job role and responsibilities.

Detailed Service Procedure Review (e.g., Brake Service, Engine Diagnostics)

Write something...

Software Proficiency Assessment (Check all applicable)

- ☐ CRM Software
- ☐ Parts Ordering System
- ☐ Diagnostic Tools
- ☐ Warranty Claim System


Number of Simulated Customer Interactions Completed

Enter a number...

Vehicle-Specific Training Completion (Select Model/Type)

- ☐ Sedan (e.g., Toyota Camry)
- ☐ SUV (e.g., Ford Explorer)
- ☐ Truck (e.g., Chevrolet Silverado)
- ☐ Hybrid/Electric Vehicle

Uploaded Training Completion Certificate (if applicable)

 Upload File

Performance Expectations & Goal Setting

Discussing performance goals, KPIs, and providing clear expectations.

Sales Quota (Units)

Enter a number...

Gross Profit Target (\$)

Enter a number...

Customer Satisfaction Score (Target)

Enter a number...

Key Performance Indicators (KPIs)

- ☐ Units Sold
- ☐ Gross Profit
- ☐ Customer Satisfaction
- ☐ Lead Conversion Rate
- ☐ Average Deal Size

Specific Goals (Brief Description)

Write something...

Goal Review Date

Enter date...

Facility Tour & Safety Briefing

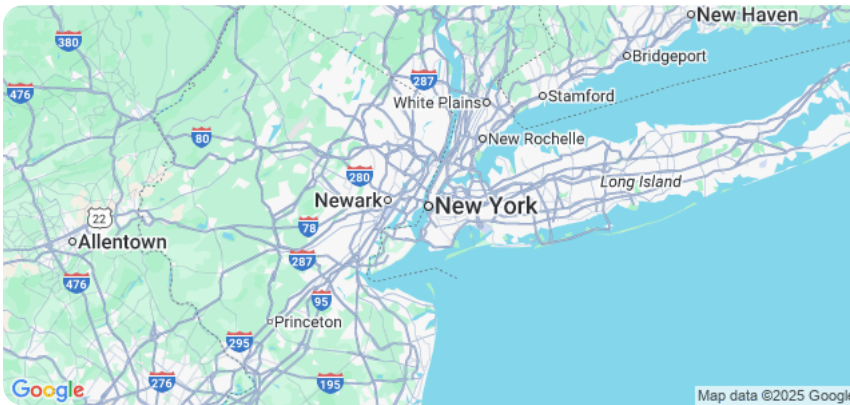
Familiarizing the employee with the work environment and safety protocols.

Emergency Evacuation Route Explanation

Write something...

Fire Extinguisher Location(s)

 [Set My Current Location](#)



First Aid Station Number

Enter a number...

Explanation of Personal Protective Equipment (PPE) Requirements

Write something...

Acknowledgement of Safety Procedures Read

☐ Yes

☐ No

Equipment Training & Certification (if applicable)

Providing training and certification for operating specialized equipment.

Equipment Requiring Training

- ☐ Diagnostic Scanners
- ☐ Welding Equipment
- ☐ Alignment Racks
- ☐ Paint Booth Operations
- ☐ Brake Lathe
- ☐ Tire Changing Machine

Training Start Date

Enter date...

Training End Date

Enter date...

Hours of Training Completed

Enter a number...

Certification Level (if applicable)

- ☐ Basic
- ☐ Intermediate
- ☐ Advanced
- ☐ N/A

Upload Certification Document (if applicable)

 Upload File

Trainee Signature

30-60-90 Day Check-in & Feedback

Scheduling regular check-ins to monitor progress and provide constructive feedback.

30-Day Check-in Date

Employee Self-Assessment (30 Days)

Manager Feedback (30 Days)

Progress Towards Initial Goals (1-10 Scale)

Overall Performance Impression (60 Days)

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement

Areas for Development (90 Days)

Write something...

Employee Signature

Manager Signature