



Retail Employee Onboarding & Training Checklist 2026

Pre-Arrival & Documentation

Verification of employment eligibility, signed contracts, tax forms, and completion of all required administrative paperwork.

Employee Start Date

Employee Full Name

Completed Documents

- ☐ Signed Employment Contract
- ☐ Tax Identification/W-4 Form
- ☐ Direct Deposit Authorization
- ☐ Signed Employee Handbook Acknowledgment
- ☐ ID & Right to Work Verification (I-9)

Digital Copy of Signed Contract

 Upload File

Hiring Manager Verification

Workplace Orientation & Facility Tour

Introduction to store layout, breakrooms, emergency exits, restrooms, and designated staff-only areas.

Orientation Date

Enter date...

Tour Completion Checklist

- ☐ Emergency Exits & Assembly Points
- ☐ Staff Breakroom & Lockers
- ☐ Restrooms & Handwashing Stations
- ☐ Stockroom & Receiving Area
- ☐ First Aid Station & Safety Equipment
- ☐ Manager's Office & Secure Storage

Notes on Specific Facility Instructions

Write something...

Employee Acknowledgement of Facility Tour

Company Culture & Brand Standards

Review of mission statement, brand values, dress code policy, and customer service etiquette expectations.

Brand Values Acknowledged

- ☐ Customer First Mindset
- ☐ Operational Excellence
- ☐ Integrity and Honesty
- ☐ Team Collaboration

Uniform & Dress Code Compliance

- ☐ Compliant
- ☐ Non-Compliant (Action Required)

Employee Summary of Brand Mission

Write something...

Training Completion Date

Enter date...

Employee Acknowledgment of Brand Standards

Product Knowledge & Merchandising Training

Training on core product categories, key features, inventory locations, and basic visual merchandising guidelines.

Product Categories Covered

- ☐ New Arrivals
- ☐ Seasonal Inventory
- ☐ Core/Evergreen Stock
- ☐ Promotional/Sale Items

Merchandising Standards Proficiency

- ☐ Beginner - Needs Supervision
- ☐ Intermediate - Competent
- ☐ Advanced - Can Train Others

Key Product Features Identified

Write something...

Trainer Feedback on Merchandising Skills

Write something...

Employee Acknowledgment of Product Training

POS System & Cash Handling Procedures

Step-by-step training on processing transactions, handling returns, managing discounts, and end-of-shift cash reconciliation.

Employee Register Assignment

- ☐ Register 01
- ☐ Register 02
- ☐ Mobile/Tablet POS

POS Competencies Verified

- ☐ Processing Cash Transactions
- ☐ Processing Credit/Debit Transactions
- ☐ Applying Discounts & Coupons
- ☐ Processing Returns & Exchanges
- ☐ Gift Card Activation/Balance Inquiry

Initial Float/Drawer Amount

Write something...

Training Completion Date

Enter date...

Trainer Acknowledgment

Trainee Acknowledgment

Loss Prevention & Security Protocols

Training on identifying suspicious behavior, using security tags, reporting theft, and following emergency procedures.

Security Equipment Verified

- ☐ CCTV Cameras Operational
- ☐ Security Tags/EAS System Working
- ☐ Alarms & Sensors Active
- ☐ Electronic Article Surveillance (EAS) Pedestals Functional

Employee ID Badge Issued

- ☐ Yes
- ☐ No

Incident Reporting Training Completion Notes

Write something...

Security Training Completion Date

Enter date...

Employee Acknowledgment of Security Protocol

Inventory Management & Stockroom Safety

Procedures for receiving shipments, replenishing shelves, using handheld scanners, and maintaining a safe stockroom environment.

Inventory Audit Date

Enter date...

Stockroom Safety Check Items

- ☐ Aisles and walkways are clear of obstructions
- ☐ Heavy items are stored on lower shelves
- ☐ All incoming shipments have been logged
- ☐ PPE (Gloves/Safety Boots) is available and in use
- ☐ Hazardous materials are properly labeled

Number of Unprocessed Shipments

Enter a number...

Stockroom Condition Rating

- ☐ Excellent
- ☐ Acceptable
- ☐ Needs Immediate Attention

Discrepancies or Safety Hazards Noted

Write something...

Supervisor Verification

Customer Service Excellence & Conflict Resolution

Guidelines for greeting customers, managing difficult interactions, and following the store's complaint resolution workflow.

Employee Familiarity with Greeting Protocol

- ☐ Fully Competent
- ☐ Needs Supervised Practice
- ☐ Requires Retraining

Key Customer Service Skills Mastered

- ☐ Active Listening
- ☐ Product Upselling
- ☐ Handling Returns/Exchanges
- ☐ De-escalation Techniques
- ☐ Closing Sales

Notes on Specific Conflict Resolution Scenarios

Write something...

Training Completion Date

Enter date...

Trainer Acknowledgment

Health, Safety, and Sanitation Compliance

Review of cleaning schedules, chemical handling (SDS), injury reporting, and workplace safety standards.

Inspection Date

Safety Equipment Check

- ☐ Fire Extinguishers
- ☐ First Aid Kit
- ☐ Eye Wash Station
- ☐ Emergency Exit Signage

Sanitization Log Verification

- ☐ Completed
- ☐ Incomplete
- ☐ N/A

Hazard Identification Notes

Write something...

Safety Officer Signature

Performance Review & 30-Day Milestone

Initial feedback session to evaluate training progress, address questions, and set goals for the first month of employment.

Review Completion Date

Enter date...

New Hire Training Progress

- ☐ Fully Competent
- ☐ Requires Continued Supervision
- ☐ Needs Significant Retraining

Core Competencies Mastered

- ☐ Point of Sale (POS) Operation
- ☐ Product Knowledge
- ☐ Loss Prevention Awareness
- ☐ Customer Interaction
- ☐ Store Maintenance/Cleaning

Manager's Performance Summary

Write something...

Employee Feedback/Comments

Write something...

Manager Signature

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✓ Finish

🔗 Generate Sample Report