New Agent Nesting Checklist

Class: [Class name / start date]. Nesting lead: [Name]. Planned nesting length: [2] weeks. Tick each item when done and initial it. Track each agent's daily metrics on the class tracker alongside this checklist.

BEFORE NESTING STARTS (TRAINING TEAM AND WFM)

- [ ] Classroom assessments complete; agents below the pass mark have a remediation plan or a decision has been made
- [ ] Nesting area or virtual nesting channel set up, away from the main floor noise if possible
- [ ] Nesting lead and floor support assigned at a ratio of about 1 coach to 8 to 12 agents
- [ ] Production logins tested for every agent: phone/ACD, CRM, knowledge base, ticketing, payment or verification tools
- [ ] Agents routed to a limited queue or skill (simpler call types first) in the ACD
- [ ] Escalation path agreed: who agents ask, how to raise a hand (physical or chat), and the supervisor for transfers
- [ ] Ramp targets for each week agreed with operations and shared in writing
- [ ] Workforce management has the class in the forecast at reduced productivity
- [ ] Shift schedule and break times confirmed with each agent
- [ ] Receiving team leads named, with a planned transition date

DAY 1 OF NESTING

- [ ] Welcome huddle: what nesting is, how long it lasts, what graduation requires
- [ ] Walk through ramp targets and how agents will get feedback
- [ ] Agents listen to 3 to 5 live calls from an experienced agent before taking their own
- [ ] First live calls taken with a coach listening in or seated alongside
- [ ] Every agent takes at least [10] calls, with feedback on each of the first few
- [ ] End-of-day debrief: top questions, system problems, call types that caused trouble
- [ ] System or access issues logged and assigned to IT the same day

DAILY DURING NESTING

- [ ] Start-of-shift huddle (10 minutes): one skill or policy tip, changes, yesterday's common errors
- [ ] Each agent gets at least one side-by-side or call review with written feedback
- [ ] Daily metrics captured per agent: calls handled, average handle time, QA score, holds and transfers, escalations
- [ ] Questions agents asked are collected and turned into knowledge base fixes or job aids
- [ ] Attendance and tardiness tracked and addressed the same day
- [ ] Agents at risk (falling behind ramp or absent) flagged to the training manager

END OF WEEK 1

- [ ] Each agent within [150]% of target average handle time
- [ ] QA score of at least [75]% on [5] evaluated calls
- [ ] All compliance items (verification, disclosures) passed on every evaluated call
- [ ] One-on-one check-in with each agent: confidence, workload, schedule concerns
- [ ] Additional call types or skills added to routing for agents on track
- [ ] Remediation plan written for any agent behind ramp

END OF WEEK 2 (GRADUATION REVIEW)

- [ ] Average handle time within [120]% of team target
- [ ] QA score of at least [85]% on the last [5] evaluated calls with no compliance failures
- [ ] First contact resolution or repeat-call rate at or near [target]
- [ ] Schedule adherence at or above [90]%
- [ ] No unresolved attendance issues under the attendance policy
- [ ] Agent can find answers in the knowledge base without help for the top 20 call reasons
- [ ] Graduation decision recorded: graduate, extend nesting by [1] week with a plan, or refer to HR
- [ ] Handover meeting with the receiving team lead, including strengths, focus area and open coaching

FIRST 30 DAYS AFTER GRADUATION

- [ ] Weekly coaching session with the new team lead
- [ ] QA evaluations at an increased rate (for example 8 per month instead of 4)
- [ ] 30-day check-in by HR or training on experience and intent to stay
- [ ] Class results reported: graduation rate, nesting attrition, days to proficiency

SIGN-OFF

Agent name: _____
Graduation date: _____
Nesting lead signature: _____
Receiving team lead signature: _____
Operations manager signature: _____