New Agent Training Plan

Adjust the length to the complexity of your program: a simple inbound queue may need 2 weeks of classroom training, a regulated financial or healthcare queue 5 to 8. Each week ends with a gate the trainee must pass before moving on. Record results on the class tracker daily.

CLASS DETAILS

Program / line of business

Class ID / cohort name

Site or virtual

☐ On site ☐ Virtual ☐ Hybrid

Lead trainer

Nesting supervisor / team lead

Class start date

Planned floor (production) date

Number of trainees at start

Training hours per day

PRE-START (BEFORE DAY 1)

- ☐ System access requested for every trainee: network login, CRM, telephony/softphone, knowledge base, LMS, timekeeping
- ☐ Equipment shipped and confirmed for remote trainees (headset, computer, any security tokens)
- ☐ Welcome message with schedule, dress code or camera expectations, parking or login instructions and the trainer's contact details
- ☐ New hire paperwork and required compliance acknowledgements completed
- ☐ Training room, virtual classroom and training environment (sandbox accounts) tested
- ☐ Nesting team lead and floor buddies assigned

WEEK 1: COMPANY, CUSTOMER AND CORE SYSTEMS

- ☐ Day 1: Welcome, introductions, the program and its customers, policies, attendance rules, how pay and schedules work
- ☐ Day 1-2: Security, privacy and compliance training (data protection, PCI if handling cards, call recording notice, HIPAA or other program rules)

- [ ] Day 2-3: Systems walkthrough in the training environment: CRM, telephony states, disposition codes, ticketing, knowledge base search
- [ ] Day 3-4: Top 5 call types by volume: what the customer wants, the steps to resolve, the policies behind them
- [ ] Day 4-5: Call flow and script walkthrough, verification process, hold and transfer procedure
- [ ] Daily: 30 minutes listening to recorded calls with a guided worksheet
- [ ] Gate 1: Policy and systems quiz, pass mark [80]%; navigation test completing [5] common tasks in the training environment

WEEK 2: CALL HANDLING SKILLS AND REMAINING CALL TYPES

- [ ] Next 5 to 10 call types by volume, plus how to recognize calls that must be escalated
- [ ] Soft skills: listening, specific acknowledgement, plain language, managing silence and hold time
- [ ] De-escalation and handling difficult or abusive callers
- [ ] Notes and documentation standards, with graded note-writing exercises
- [ ] Daily roleplays in pairs, rising in difficulty, with trainer feedback against the QA form
- [ ] Introduction to the QA scorecard and how agents are measured (QA, CSAT, FCR, AHT, adherence)
- [ ] Gate 2: Graded roleplays on [4] call types scoring [80]% or higher on the QA form; product and process knowledge test pass mark [80]%

WEEK 3: SUPERVISED LIVE CALLS (TRAINING BAY)

- [ ] Side-by-side: trainee listens live to an experienced agent for [4] hours, then takes calls while the agent listens
- [ ] Trainee takes live calls on a limited queue (simplest call types only) with trainer or floor support at hand
- [ ] Daily huddle: review of the hardest calls of the previous day
- [ ] [2] scored QA evaluations per trainee per day, reviewed the same day
- [ ] Remaining call types and edge cases introduced as trainees handle real volume
- [ ] Gate 3: Average QA of [80]% across the week, zero compliance auto-fails, trainer sign-off on readiness for nesting

WEEK 4 ONWARD: NESTING

- [ ] Class moves to a dedicated nesting team with a higher support ratio (one team lead or floor coach per [8 to 12] agents)
- [ ] Full queue with adjusted targets: AHT target [130-150]% of production in week 1 of nesting, stepping down weekly
- [ ] Daily QA evaluation and short coaching for each agent
- [ ] Daily nesting metrics review: QA, AHT, hold time, transfers, adherence
- [ ] Graduation criteria to production: QA at or above [85]% for [5] consecutive days, AHT within [115]% of target, no compliance misses, adherence at or above [90]%
- [ ] Agents who miss graduation criteria get a defined extension (up to [1] week) with a written plan

CLASS RESULTS AND SIGN-OFF

Trainees at start

Trainees who passed each gate (Gate 1 / 2 / 3)

Trainees who graduated to production

Training attrition % ((start - graduated) / start x 100)

Average days to reach production targets

Main reasons trainees left or failed

Changes recommended for the next class

Trainer signature

Date

Operations manager signature

Date

Date