# Customer Service Training Checklist

*Purpose:* This document ensures all newly onboarded customer service agents have completed the required training before independently handling customer cases.

## Agent Information

**Name:** {agentName}

**Start Date:** {startDate}

**Supervisor:** {supervisorName}

## Mandatory Training Modules

The agent must complete the following training modules:

{#modules}

* **{title}:** {description}

{/modules}

## Assessment Checklist

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Description** | **Completed (Yes/No)** | **Date Completed** |
| {#checklist}{task} | {description} | {completed} | {dateCompleted}{/checklist} |

## Shadowing Sessions

The following shadowing sessions must be logged:

|  |  |  |
| --- | --- | --- |
| **Date** | **Agent Shadowed** | **Notes** |
| {#shadowingSessions}{date} | {agentShadowed} | {notes}{/shadowingSessions} |

## Final Evaluation

**Evaluator:** {evaluatorName}

**Date of Evaluation:** {evaluationDate}

Final Comments:

{finalComments}

{#isApproved}

**Status:**Approved

{/isApproved}

{^isApproved}

**Status:**Not Approved

{/isApproved}

*This checklist must be signed and filed before the agent is granted full access to the customer support system.*