

Standard Operating Procedure (SOP): Training and Onboarding Procedures for New Agents

This SOP defines the **training and onboarding procedures for new agents**, encompassing orientation programs, role-specific training modules, compliance and regulatory education, performance evaluation criteria, mentoring and support systems, and integration into the company culture. The goal is to equip new agents with the necessary knowledge, skills, and resources to perform effectively and confidently in their roles, ensuring a smooth transition and sustained productivity.

1. Scope

This SOP applies to all newly hired agents across departments. It guides HR, departmental managers, trainers, and mentors in the seamless onboarding and training of new hires.

2. Responsibilities

Role	Responsibility
Human Resources (HR)	Organize onboarding schedule, documentation, company policies overview
Department Manager	Assign mentors, performance monitoring, feedback provision
Trainer/Coach	Deliver training modules, oversee knowledge checks
Mentor/Buddy	Support new agent, answer queries, facilitate cultural integration
New Agent	Engage in onboarding/training, complete required assessments, seek clarification as needed

3. Procedures

- Pre-Onboarding Preparation:**
 - Prepare welcome kit and required equipment (laptop, ID, software access)
 - Send pre-joining welcome email with reporting instructions
- Orientation Program (Day 1):**
 - Company overview: mission, vision, values, and history
 - Introduction to key policies and code of conduct
 - General administrative processes (payroll, leaves, attendance)
- Role-Specific Training (Week 1-2):**
 - Job description and performance expectations
 - Product and service knowledge
 - System and software training
 - Standard operating procedures relevant to the role
- Compliance & Regulatory Education:**
 - Mandatory compliance modules (e.g., data privacy, workplace health & safety)
 - Assessment quizzes and documentation
- Mentoring and Support System (Ongoing):**

- Assign a dedicated mentor/buddy for the first 3 months
- Schedule weekly check-ins for progress and feedback

6. Performance Evaluation:

- Set clear, measurable Key Performance Indicators (KPIs) for the probation period
- Conduct 30-, 60-, and 90-day performance reviews
- Document progress and address gaps with additional support as required

7. Cultural Integration:

- Invite new agents to team meetings & company events
- Encourage participation in cultural programs and knowledge Exchange platforms

8. Completion & Certification:

- Agents must complete all modules and assessments with required scores
- Issue onboarding completion certificate and grant full system access

4. Documentation & Records

- Onboarding checklist (signed by agent and HR)
- Training attendance sheets
- Assessment and compliance results
- Performance review forms

5. Review & Continuous Improvement

- Collect feedback from new agents after onboarding completion
- Analyze training outcomes and update modules annually

6. References

- Employee Handbook
- Role-specific Technical Manuals
- Compliance & Regulatory Documents

Effective Date: [Insert Effective Date]

Next Review: [Insert Review Date]