TrueCX

Day One Readiness:
A Practical Checklist for Contact Center Trainers

An agent's first day on the phones sets the tone for their confidence, performance, and long-term success.

This checklist helps learning and development teams validate that agents are truly ready to take live calls. Not just trained, but confident.

Agent Fundamentals

- [ ] Agent system access is provisioned, tested, and working
- [ ] Headsets and audio equipment are configured and tested
- [ ] Product and service information is updated and shared
- [ ] Queue, call flow, and escalation paths are updated and shared
- [ ] Training and coaching plan is completed and shared

Call Readiness

- [ ] **Agent has completed realistic calls with an Intelligent Virtual Customer (IVC) and scored above the readiness threshold**
- [ ] **Agent shows strong grasp of product and service information**
- [ ] **Agent has successfully practiced handling common objections**
- [ ] **Agent has successfully practiced recovering after an escalation or wrong turn**
- [ ] **Agent has received and applied feedback on soft skills and pacing**

Trainer note: Teams that use realistic, repeatable call simulations. like Intelligent Virtual Customers (IVCs) from TrueCX, see agents build confidence faster because practice happens without pressure from real customers.

Floor Readiness

- [ ] Agent knows how to place callers on hold
- [ ] Agent knows when and how to escalate
- [ ] Agent knows what to do if audio or systems fail mid-call
- [ ] Agent knows who is monitoring or supporting live calls
- [ ] Agent understands how feedback and coaching will be delivered

Support in the First 24 Hours

- [ ] Agent knows who to approach with questions
- [ ] Coaching plan for first live calls is defined
- [ ] Trainer or coach is assigned for check-ins
- [ ] Agent knows when feedback will be communicated
- [ ] Agent know what QA criteria they will be evaluated on

Day One Readiness Assessment

Count your total boxes checked:

0-5 BOXES CHECKED
HIGH RISK. AGENTS ARE LIKELY TO FEEL OVERWHELMED OR DISTRACTED ON DAY ONE.

6-14 BOXES CHECKED
MODERATE RISK. AGENTS MAY SURVIVE DAY ONE, BUT CONFIDENCE WILL LAG.

15-20 BOXES CHECKED
STRONG READINESS. AGENTS ARE SET UP TO PERFORM WITH CONFIDENCE ON DAY ONE.

TrueCX

Train agents with lifelike phone simulations before the first call

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