



# First-Week Training and Shift Handoff

A practical kit for teaching ordinary store tasks and keeping open issues visible between shifts.

**YOUR FINISHED RESULT**

A named trainer, one demonstrated task, an observed practice attempt and a clear record of what the next shift needs to do.

## Start with one task, not the whole store

Choose a routine task the employee is allowed to perform, such as checking the item code and count on a nonhazardous supply delivery. The trainer should already know the store's approved method. Schedule this required job training as paid work and record the time. [2]

| Inside                      | Use it for                                               |
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| 2-3 / Teach and demonstrate | A repeatable training method and a completed example.    |
| 4-5 / Plan and verify       | A first-week sequence and task sign-off sheet.           |
| 6-7 / Handoff and routines  | Printable shift notes and a customizable task checklist. |
| 8 / Follow-up and sources   | Review progress and check the source guidance.           |

Free to use. No purchase or wholesale account required. This is an operations template, not an employee handbook, safety course or employment agreement.

# Show it. Let them try. Check the result.

Adapted from the four-stage job-instruction approach described by NIST MEP. The store examples and forms are original. [1]

| Stage       | Trainer action                                                                                                     | Evidence                                  |
|-------------|--------------------------------------------------------------------------------------------------------------------|-------------------------------------------|
| Prepare     | Explain the task, its purpose and when to stop for help. Ask about prior experience and preferred learning format. | Employee can describe the goal.           |
| Demonstrate | Show one small step at a time. Point out the important check and why it matters.                                   | Trainer uses the actual store procedure.  |
| Practice    | Let the employee perform the task and explain the checks. Correct mistakes calmly; demonstrate again when needed.  | Observed attempt, not just a signature.   |
| Follow up   | Name the person to ask for help. Check a later attempt and reduce supervision only when ready.                     | Specific task approval and a review date. |

## Make the standard visible

Replace "looks good" with observable steps. For a delivery count: the code matches, the pack conversion is correct, the count is recorded and an exception is escalated. Use language and examples the employee understands; ask them to explain it back without making the exercise punitive.

### SCOPE BEFORE SIGN-OFF

Confirm role permissions and any age or equipment restrictions before assigning a task. In Wisconsin, a work permit does not authorize prohibited work. [3] This kit does not authorize fuel-system work, hazardous equipment, food-safety duties or other specialized tasks.

Keep passwords, safe codes, Social Security numbers and medical information off these shared forms. Store personnel records according to your business process.

# Teach a delivery-count check

Hypothetical task: verify one already-unloaded, safely accessible carton of paper towels against its delivery line. No lifting or equipment operation is taught here.

| Step                    | Important check                                                           | Why it matters                                   |
|-------------------------|---------------------------------------------------------------------------|--------------------------------------------------|
| Read the item label     | Match code, size and pack with the delivery line.                         | Similar packaging can hide a different item.     |
| Identify the count unit | The carton is labeled 12 individual rolls.                                | One case is not one selling unit.                |
| Count the receipt       | Count 12 rolls; set aside one visibly damaged roll under store procedure. | Physically arrived and sellable are different.   |
| Record both amounts     | Arrived 12; held 1; sellable 11.                                          | The next employee can see what happened.         |
| Report the exception    | Notify the named receiver / manager and reference the sheet.              | The employee does not promise a supplier credit. |

## Check learning with a new attempt

Have the trainee use a different practice line. Ask: "What would you do if the case label said 6 while the order line said 12?" A satisfactory response is to stop, recount and ask the authorized person to resolve the mismatch before posting the receipt.

### EXAMPLE COACHING NOTE

First attempt: recorded one case as one unit. Trainer reviewed the pack label; trainee repeated the conversion correctly on a second line. Still needs a follow-up observation on the next delivery. This is a training note, not proof of independent task approval.

# A first-week sequence you can adapt

These are five training checkpoints. Spread them across actual paid shifts; readiness, permissions and safe coverage determine the pace.

| Checkpoint   | Teach / practice                                                                               | Check before moving on                                      |
|--------------|------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| First shift  | Who supervises, how to record time, where procedures are, how to get help and report a hazard. | Employee can locate the procedure and identify the contact. |
| Routine task | One approved stocking, count or housekeeping task; demonstrate, then observe.                  | Important checks are performed correctly.                   |
| Exception    | Use a practice mismatch or unfinished task.                                                    | Employee stops and escalates instead of guessing.           |
| Shift change | Write one specific handoff and review the incoming shift's questions.                          | The next person knows the action, owner and due time.       |
| Follow-up    | Repeat the task with the usual level of supervision. Discuss unclear instructions.             | Document approved tasks and tasks still requiring help.     |

Employee / trainer / starting date / required paid training time recorded in

Tasks allowed now / tasks requiring supervision / next review

Employee question or improvement suggestion to follow up

# Task instruction and verification

One sheet per task. Sign-off means the specific observed standard was met, not blanket permission for every store duty.

Employee / trainer / task / procedure version / date

| Task step | Important check / reason |
|-----------|--------------------------|
|           |                          |
|           |                          |
|           |                          |
|           |                          |

Demonstrated on / practice observed on / what went well

Correction or additional practice needed / stop-and-ask trigger

| Readiness decision                            | Record the scope |
|-----------------------------------------------|------------------|
| Needs demonstration or supervised practice    |                  |
| Approved for this task by / date              |                  |
| Follow-up observation date / contact for help |                  |

Trainer initials: \_\_\_\_\_ Employee acknowledgment: \_\_\_\_\_  
Acknowledgment records the discussion; it does not replace an observed performance check.

# Shift handoff: make the next action clear

For urgent safety or security issues, use the store's immediate reporting procedure. A written handoff alone is not enough.

Store / date / outgoing shift / incoming shift / handoff time

| Issue / exact location | Action already taken | Next owner / due time | How to verify closure |
|------------------------|----------------------|-----------------------|-----------------------|
|                        |                      |                       |                       |
|                        |                      |                       |                       |
|                        |                      |                       |                       |
|                        |                      |                       |                       |
|                        |                      |                       |                       |

## Example of a useful handoff

"Delivery INV-810: 12 rolls missing, 3 damaged held in the marked area. Photos saved with the receiving sheet. Sam to contact supplier before its documented claim deadline; manager to verify the response. Case still open."

Avoid "delivery problem handled" if someone still needs to act. Use reference numbers and operational facts rather than customer or employee personal details.

Incoming person confirms priorities / unresolved question / time accepted

# Build your store's routine checklist

The manager chooses the tasks, timing and approved procedure. This blank template is not a complete opening, closing or safety checklist.

Store / opening, midshift or closing / date / responsible person

| Task and approved procedure | Due time | Initials / time done | Exception / person notified |
|-----------------------------|----------|----------------------|-----------------------------|
|                             |          |                      |                             |
|                             |          |                      |                             |
|                             |          |                      |                             |
|                             |          |                      |                             |
|                             |          |                      |                             |
|                             |          |                      |                             |

Possible ordinary tasks to customize: read the previous handoff, check the assigned shelf section, record delivery exceptions, refill an approved supply area, and pass unresolved items to the next shift.

Manager review / overdue task owner / next check

Reference sensitive security procedures by their approved location. Do not write access codes on a sheet left near the register.

# Check whether the training worked

## After the next few shifts

Ask the employee to repeat the task and explain the important checks. Look for the same mistakes reappearing, unclear instructions and missing tools. Update the instruction sheet before assuming the person is the problem. Decide which tasks still need supervision.

## At a shift change

Sample one unresolved item: can the next employee identify its status, owner, due time and closure evidence? If not, rewrite the handoff together. A completed checkbox is useful only when the underlying task was done.

### MANAGER SETUP MATTERS

Arrange paid training coverage, accessible instruction and a reachable supervisor. Confirm current role, age and equipment restrictions. Use your own HR, safety and operating procedures for matters this kit does not cover.

Research checked October 13, 2026. Click a source title to open it. Source organizations do not endorse MH Wholesale or these guides.

#### 1. **NIST MEP | Training Within Industry**

Four-stage demonstration, practice and follow-up approach. Originally a manufacturing method; the retail examples here are our adaptation.

#### 2. **U.S. Department of Labor | Hours Worked Advisor**

Training-time treatment depends on the facts. Schedule and record the required job training in this kit as paid work.

#### 3. **Wisconsin DWD | Prohibited or restricted work for minors**

Check task and equipment restrictions before assigning work to a minor.

All store scenarios, numbers, schedules and blank forms are original illustrations. They are not customer results. Adapt the worksheets to your own records and approved procedures.