CUSTOMER SERVICE PERFORMANCE REVIEW CHECKLIST

Name of the Customer Service Rep Review Date



- Review two short customer conversations
- Give feedback
- Review two medium/long customer conversations
- Give feedback
- Assess customer service metrics

Confirm Strengths and Weaknesses

- · Establish areas of strength
- · Establish areas of improvement

Set Goals

- Brainstorming session
- Set SMART goals

Follow Up

- Follow-up on individual goals
- Set the date for the next performance review

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H Kauffman

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