

# **CUSTOMER SERVICE PERFORMANCE REVIEW CHECKLIST**

**Name of the Customer Service Rep**

**Review Date**



## **Performance Assessment**

- 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

# Sample Performance Review Phrases For Customer Service

**Kelly M. Quintanilla, Shawn T. Wahl**



## **Sample Performance Review Phrases For Customer Service:**

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