

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

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