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[**Microsoft Word Performance Review Templates: 10 Great Templates You NEED to See!**](https://teamflect.com/blog/performance-management/microsoft-word-performance-review-template)

**Customer Service Representative Evaluation Template**

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| **Customer Service Representative Evaluation Template** | | | | | |
| **Adele Vance:**  Retail Manager |  | | **Reviewer:** Miriam Graham **Review Period:**  **Self-review submitted on:  Review Due: Finalize Due:** | | |
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| These questions are designed to assess various aspects of a manager's performance and provide valuable feedback for their professional development and improvement. | | | | | |  |
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| **1. Communication Skills** | | | | | |  |
| **Q1:** Was the CSR clear and articulate in their communication? (Evaluate how well the representative conveyed information, ensuring the customer clearly understood the responses.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q2:** Did the CSR use an appropriate tone throughout the conversation? (Assess whether the tone was professional, friendly, and aligned with the situation.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q3:** Was the CSR empathetic and did they demonstrate active listening? (Review the CSR's ability to understand and empathize with the customer’s concerns by listening attentively.) | | | | | |  |
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| **Q4:** Did the CSR use positive and polite language? (Determine if the CSR maintained professionalism through the use of respectful and encouraging language.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q5:** How well did the CSR explain solutions or steps to the customer? (Assess the clarity and detail in the CSR's explanation of how to resolve issues or take further steps.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **2. Problem-Solving Abilities** | | | | | |  |
| **Q1:** Was the CSR able to quickly identify the customer’s issue? (Examine how efficiently the CSR recognized and understood the core issue presented by the customer.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q2:** Did the CSR demonstrate problem-solving skills by offering relevant solutions? (Evaluate the CSR’s ability to propose effective, workable solutions to the customer's issue.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q3:** How effectively did the CSR resolve the customer's issue? (Review the overall success of the resolution provided and the CSR’s impact on solving the problem.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q4:** Was the CSR proactive in addressing potential problems or questions? (Determine whether the CSR anticipated and addressed any potential follow-up issues or questions.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q5:** Did the CSR follow the appropriate steps for escalation if needed? (Assess if the CSR followed escalation protocols when the situation required higher-level intervention.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **3. Customer Satisfaction** | | | | | |  |
| **Q1:** Did the customer express satisfaction with the support provided? (Evaluate whether the CSR’s performance led to a positive outcome for the customer.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q2:** Was the customer's issue resolved in a timely manner? (Review the speed of issue resolution, keeping in mind the complexity of the issue.) | | | | | |  |
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| **Q3:** How likely is the customer to recommend the company based on this interaction? (Determine the level of customer loyalty or likelihood of positive word-of-mouth following the interaction.) | | | | | |  |
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| **Q4:** Was any follow-up necessary, and if so, was it handled properly? (Assess if any additional follow-up actions were required and how efficiently they were carried out.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **4. Knowledge and Expertise** | | | | | |  |
| **Q1:** Did the CSR demonstrate adequate knowledge of the product or service? (Review whether the CSR’s knowledge was sufficient to address the customer’s needs and queries.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q2:** Was the CSR able to answer all of the customer's questions? (Evaluate the CSR's understanding and ability to provide accurate responses.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q3:** Did the CSR provide accurate and relevant information? (Determine if the information given was both correct and applicable to the customer’s issue.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **5. Professionalism** | | | | | |  |
| **Q1:** Did the CSR adhere to company guidelines and procedures? (Evaluate the CSR’s adherence to established company policies during the interaction.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q2:** Was the CSR professional in handling the customer’s concerns? (Review the representative's conduct to ensure they managed the issue respectfully and efficiently.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q3:** Was the CSR punctual and timely in their responses? (Examine how quickly and appropriately the CSR responded throughout the interaction.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q4:** Did the CSR show patience and avoid frustration during the conversation? (Assess whether the CSR maintained composure and patience, especially during challenging moments.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **6. Efficiency and Productivity** | | | | | |  |
| **Q1:** How long did the CSR take to resolve the issue? (Assess the overall efficiency in handling the customer's concern, considering both time and effort.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q2:** Was the CSR professional in handling the customer’s concerns? (Did the CSR manage their time effectively? Review whether the CSR balanced time spent on the issue with delivering high-quality service.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Q3:** Was the CSR able to handle multiple tasks effectively if needed? (Evaluate the CSR’s ability to juggle more than one issue or task at once, if applicable.) | | | | | |  |
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| **Adele's answers** | | | | **Miriam's answers** | |  |
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| **Rating of this employee (Miriam's answers) (Between 1-10)** | | | | | |  |
|  | **Rating** |  | **Weighted Average** | | |  |
| **Cultural fit** | 6.5 |  | 7.125 | | |  |
| **Goal progress** | 8 |  |  |
| **Quality of work** | 7 |  |  |
| **Communication** | 7 |  |  |
| **Overall Comments** | | | | | |  |
|  | | | | | |  |
|  |
|  |
|  |
| **Employee Signature** |  | | **Reviewer Signature** |  | **Date** |  |