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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** |  |
| Lorem ipsum | Lorem ipsum |  |
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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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| **Adele's answers** | **Miriam's answers** |  |
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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** |  |
| Lorem ipsum | Lorem ipsum |  |
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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** |  |
| Lorem ipsum | Lorem ipsum |  |
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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** |  |
| Lorem ipsum | Lorem ipsum |  |
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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** |  |
| Lorem ipsum | Lorem ipsum |  |
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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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| **Adele's answers** | **Miriam's answers** |  |
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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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| **Adele's answers** | **Miriam's answers** |  |
| Lorem ipsum | Lorem ipsum |  |
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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** |  |
| Lorem ipsum | Lorem ipsum |  |
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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** |  |
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| **EmployeeSignature** |   | **ReviewerSignature** |   | **Date** |  |