

# Customer Service Representative Year-End Review

## Employee Information

Name

Employee Name

Position

Customer Service Representative

Department

Department

Review Period

e.g. Jan 2023 - Dec 2023

Reviewer

Supervisor/Manager Name

## 1. Key Responsibilities

- Handling customer inquiries via phone, email, and chat
- Resolving customer complaints
- Documenting interactions in CRM
- Upselling products and services
- Following company protocols and standards

## 2. Performance Summary

Summary of Achievements

Describe key achievements and contributions

Areas of Excellence

Highlight top strengths

Areas for Improvement

Outline areas for further growth

### 3. Goals

Previous Year Goals & Results

Review last year's goals and outcomes

Goals for Next Year

Set clear, actionable goals for the upcoming year

### 4. Professional Development

Training Completed

List trainings, certifications, etc.

Development Opportunities

Identify suggested learning opportunities

### 5. Additional Comments

Any other notes or feedback

### Signatures

Employee Signature

Employee Signature

Date

Date

Reviewer Signature

Reviewer Signature

Date

Date