

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