



SKILLS VERIFICATION CHECKLIST

(To be completed by the Candidate's Supervisor)

Customer Service Representative

Candidate: _____

Registration No.: _____ Candidate Job Title: _____

Period Covered: _____ Avg. No of Work Hrs per Wk: _____

Employer: _____ Supervisor: _____

Supervisor's Job Title: _____

Supervisors Professional Qualification (Optional): _____

- 1 – 2: Below minimum standards of competence
3: Meets minimum standards of competence
4: Meets most standards of competence
5: Meets highest standards of competence

Customer Service Representative Competencies		Have Competencies been achieved in this period (YES/NO)	Supervisor's Comments (Highlight strengths and weaknesses and future work experience and development requirements)
1.	Dressed in the company's prescribed attire.		
2.	Hair style suited for the position		
3.	Looks professional, neat and well groomed		
4.	Facial expressions pleasant and welcoming most of the time		
5.	Shows enthusiasm about job		
6.	Stands or sits in a position that depicts confidence		
7.	Speaks to the customers in a tone and volume that protects customers' confidentiality		
8.	Expresses self in an articulate and easy-to-understand manner		
9.	Asks appropriate questions to ascertain information that will aid customers' transactions		
10.	Speaks in a professional tone		
11.	Maintains a moderate volume and rate of speech when serving customers		
12.	Bids each customer a fond farewell, thanking the customer for his/her business		

Customer Service Representative Competencies		Have Competencies been achieved in this period (YES/NO)	Supervisor's Comments (Highlight strengths and weaknesses and future work experience and development requirements)
13.	Maintains clean, neat and uncluttered work area		
14.	Has all the tools in place to take notes and to do the job		
15.	Uses customer's name during the service encounter		
16.	Serves customers with little or no delays		
17.	Apologizes and explains to customer when there is going to be a delay in service		
18.	Able to multi-task, e.g., posting a computer transaction while giving some amount of attention to the customer		
19.	Exercises good judgment in altering policies and procedures to accommodate customers, without putting the company at risk		
20.	Shows genuine concern and respect for both internal and external customers		
21.	Shows loyalty in words and action		
22.	Able to handle irate customers		
23.	Able to handle customer complaints using the 7-step approach – listen, empathize, apologize, offer a solution, act on problem, follow through, check back		
24.	Remains calm and composed while dealing with irate and complaining customers		
25.	Refers irate customers or difficult situations to supervisor		
26.	Greets all customers with a smile, maintaining eye contact		
27.	Acknowledges customer's presence 10 feet away		
28.	Establishes and maintain eye contact with customer throughout the service delivery		
29.	Offers assistance in a professional manner, by saying, "How may I assist you?"		
30.	Prepares to listen with a pen and paper in hand		
31.	Gives customers clear and unambiguous instructions and information		
32.	Gives clear directions to other areas of the organization		
33.	Is knowledgeable on company products		

Customer Service Representative Competencies		Have Competencies been achieved in this period (YES/NO)	Supervisor's Comments (Highlight strengths and weaknesses and future work experience and development requirements)
34.	Is knowledgeable of the company's personnel and their positions		
35.	Is knowledgeable of the company's policies and procedures		
36.	Answers telephone by identifying the company, greeting the caller, and offering assistance		
37.	Handles telephone calls without delaying service to face-to-face customer		
38.	Excuses self when taking a phone call		
39.	Follows correct procedures in transferring calls		
40.	Does CSR follow correct procedures in placing calls on hold		
41.	Listens keenly with gestures of understanding		
42.	Repeats customers requests for clarification and action		
43.	Refrains from using company jargons when dealing with customers		
44.	Knowledgeable on the use of the company's computer system		
45.	Chooses appropriate time in a transaction to introduce customer to a new product		
46.	Shows ability to sell company's products and services		
47.	Sensitive to the needs of disabled customers		

You may attach a copy of the organization's own internal documentation, provided that it addresses the achievement of elements of competencies

Candidate's Signature: _____

Date: _____

RECOMMENDATION: I attest that the above information is true and understand that any misinformation provided may affect the candidacy of the applicant. I recommend this individual for certification and verify that the candidate currently holds the position of Customer Service Representative.

Supervisor's Signature: _____

Date: _____