



CXE-01 | FREE PREVIEW

Engineering the Customer Experience

FREE PREVIEW EDITION • Theory, practice and certification for contact-service teams

1

2

3

4

5

6

7

PARTICIPANT MANUAL (PREVIEW) • Agent Track + Leader Track

Organization / Department: _____

Participant name: _____

Employee ID / Team: _____

Facilitator: _____

Dates: _____

This is a free preview

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: linkedin.com/in/jc-munguia

Contents

How to use this manual	5
Program overview and agenda	6
1.1 An effective and emerging frontline skill	7
1.2 Why it matters more than ever	7
1.3 Reducing customer effort: a goal with great value	8
1.4 What "effort" really means	10
1.5 It goes beyond being nice	11
1.6 Traditional soft skills vs. experience engineering	11
1.7 Relationship focus vs. outcome focus	12
1.8 The framework: strategy and seven skills	12
1.9 How does this benefit me?	13
1.10 Where effort sits in the Kano model	14
Skill 1: Active listening	17
Skill 2: Purposeful small talk	19
Skill 3: Positive language	22
Skill 4: Advocacy	26
Skill 5: Alternative positioning	27
Skill 6: Understanding my dominant personality style	30
Skill 7: Flexing to others' personalities	34
5.1 What the 2025-2026 data says	38
5.2 The seven skills after a failed bot	39
5.3 Digital-channel adaptations	39
6.1 The parallel process	40
6.2 The seven skills, leader version	42
6.3 The Experience-Engineered Coaching Conversation (5 steps)	42
6.4 Monitoring, calibration and coaching aligned with COPC R8.0	43
6.5 Measuring effort: the leader's dashboard	45
6.6 Building the culture: team rituals	46
Summary	48
My first three steps	48

Appendix A. Phrasebook: say this, not that

49

Appendix B. Main contact drivers and KPIs

49

Appendix C. Glossary

50

Appendix D. Program documents and key references

50

Get the full certification program

52

How to use this manual

This manual is the core reading and workbook for the **Customer Experience Engineering (CXE)** internal certification. It is written for a contact-service operation of any size: an in-house customer service department, a shared-service center, or an outsourced (BPO) program. The organization used in examples, **ACME Customer Care Center**, is fictitious. Replace it with your own organization, teams and leaders wherever you see blank fields.

Two tracks, one standard

	Level 1: CXE Practitioner (Agent track)	Level 2: CXE Leader (Leader track)
Who	Frontline agents / customer service specialists (CSS) in voice, chat, email, messaging, social and back office	Team leaders, supervisors, QA analysts, trainers, workforce and operations managers
Your "customer"	The external customer	Your agents (internal customers) and, through them, the external customer
Modules	1 to 5 and 7	1 to 7 (all), with Module 6 as the core of the leader track
Theoretical exam	Assessment A, pass mark 80%	Assessment B, pass mark 85%
Practical exam	Assessment C: role plays + live interactions, 85% and zero critical errors	Assessment D: role plays with agents + live coaching and huddle, 85% and zero critical errors
Re-verification	Annual (aligned with COPC CX Standard R8.0, Item 3.3)	Annual, plus quarterly calibration



Icons and boxes you will see

Box	Meaning
Blue box	Key idea or learning objectives
Orange header	Activity: individual, pairs or group practice
Green box	Updated 2024 to 2026 evidence with its source
Purple box	Leader lens: how a leader applies the same skill with agents
Red box	Watch out: common mistakes and critical errors

Program overview and agenda

The program has seven modules. The agent track runs in two days (about 14 hours). The leader track adds a third day for Module 6 and the leader practical assessment. Times are guides; facilitators can adapt them.

Day	Block	Module / content	Track
1	08:30-10:30	Module 1: Introduction to Customer Experience Engineering	All
1	10:45-13:00	Module 2: What I Hear (Skill 1 Active Listening, Skill 2 Purposeful Small Talk)	All
1	14:00-17:30	Module 3: How I Respond (Skill 3 Positive Language, Skill 4 Advocacy, Skill 5 Alternative Positioning)	All
2	08:30-11:00	Module 4: Develop and Maintain Self-Awareness (Skills 6 and 7)	All
2	11:15-13:00	Module 5: Experience Engineering in the AI era (hybrid journeys, digital channels)	All
2	14:00-16:00	Module 7: Topic facilitation activity, summary, first three steps	All
2	16:15-17:30	Assessment A (agents) / Assessment B (leaders): theoretical	All
3	08:30-13:00	Module 6: Leading by Example (the leader track)	Leaders
3	14:00-17:30	Assessment D Part 1 (leader role plays)	Leaders
+2 to 4 wks	On the floor	Assessment C Part 2 (agents) and D Part 2 (leaders): live observations	All

Meet ACME Customer Care Center (fictitious)

Every example in this manual uses the same fictitious operation, so you can follow one story from start to finish.

Item	ACME Customer Care Center	Your organization
Lines of business	Telecom and home internet, retail banking cards, e-commerce orders, event tickets, healthcare appointment scheduling	_____
Channels	Voice, chat, email, WhatsApp-style messaging, AI virtual assistant with human handoff	_____
Size	240 agents, 16 team leaders, 4 operations managers, 8 QA analysts, 3 trainers	_____
Key metrics	CSAT and DSAT, Customer Effort Score (CES), FCR, repeat contacts, transfers, AHT, critical error accuracy, attrition, agent eNPS	_____
People in the stories	Agents: Luis, Ana, Kenji, Fatima. Team leader: Dana. Ops manager: Marco. QA analyst: Priya	_____

1

Introduction to Customer Experience Engineering

Why reducing customer effort is the goal, and why being nice is not enough

By the end of this section you will be able to:

- Explain why experience engineering is a critical frontline skill in 2026
- Describe the two components of customer effort and who controls each
- Distinguish traditional soft skills from experience engineering
- Name the seven skills of the framework and how they benefit you and your scorecard

1.1 An effective and emerging frontline skill

As service organizations work to improve the customer experience and earn loyalty, the skills that matter most are the ones aimed directly at that goal. **Customer Experience Engineering** is a strategy to **actively guide interactions** and **reduce customer effort**. With it you will learn to:

Keep control	Anticipate	Show you are on their side	Own your work
Guide each conversation with purpose instead of reacting to it	Get ahead of the customer's needs and of the next issue before it happens	Demonstrate a clear willingness to help, every time	Focus on what you can control and gain autonomy over how you handle each contact

1.2 Why it matters more than ever

Organizations that want to grow must **keep** the customers they already have, and the most reliable way to do that is to engineer better experiences. Three trends make this urgent in 2024 to 2026:

- **Simple issues are moving to self-service and AI, so humans get the hard ones.** Only 14% of service issues are fully resolved in self-service, and even among very simple issues only 36% are (Gartner, Aug 2024). When a customer reaches you, they have often already tried and failed, so their effort and emotion are higher.
- **Customers still want a human who helps.** 64% of customers would prefer companies not use AI for service, and 53% would consider switching to a competitor over it; the number one concern is difficulty reaching a person (Gartner, Jul 2024).
- **Leaders are redesigning, not removing, the human role.** 91% of service leaders feel pressure to implement AI in 2026, yet only 20% report AI-driven headcount reductions, and 84% plan to add new skills to agent roles (Gartner, Dec 2025 and Feb 2026).

14%of service issues fully resolved
in self-service

Gartner, Aug 2024 (n=5,728)

64%of customers would prefer companies
NOT use AI for service

Gartner, Jul 2024 (n=5,728)

+34 ptssatisfaction when customers are TOLD
they are talking to AI

COPC Inc., Jan 2026 (6 countries)

-70 ptspossible NPS drop when AI
fails to resolve

COPC Inc., Jan 2026

49%of repeat calls caused by the
ORGANIZATION (38% agent, 13% customer)

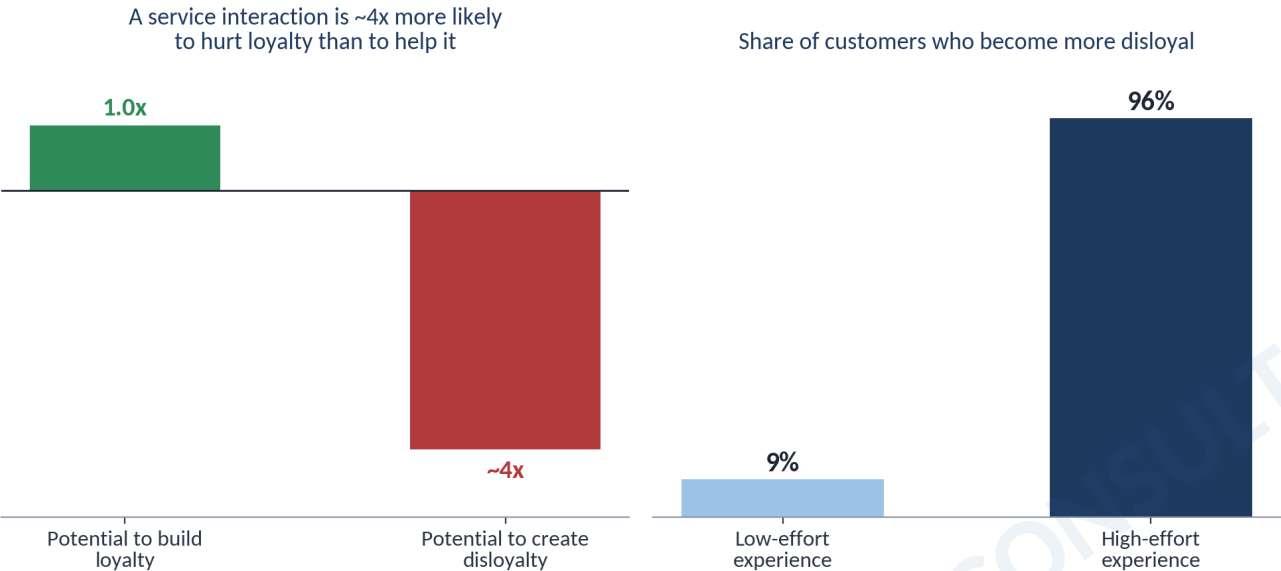
SQM Group, Feb 2025

22%of managers globally are engaged
(down 9 pts since 2022)Gallup State of the Global
Workplace, 2026 report**Updated evidence (2024-2026)**

The human interaction is now the moment of truth for the most complex, most emotional problems. That is exactly where experience engineering has the highest return. Sources and verification links are in the Evidence and Sources Pack (document CXE-07).

1.3 Reducing customer effort: a goal with great value

Research by CEB (now part of Gartner) with more than 54,000 customers found that a service interaction is roughly **four times more likely to make a customer disloyal than loyal**. Your biggest opportunity is not to delight, but to **avoid creating disloyalty**, and the lever is effort: 96% of customers who had a high-effort experience became more disloyal, versus 9% after a low-effort one.



Source: CEB (now Gartner) Customer Loyalty Survey, n = 54,166; reported in Dixon, Toman & DeLisi, The Effortless Experience (2013). Still cited by Gartner as the effort-loyalty baseline.

Is this still true? (2026 check)

Yes. Newer studies point the same way. Qualtrics XM Institute (Q3 2025, 20,000+ consumers, 14 countries) estimates US\$3 trillion in global sales at risk from bad experiences in 2026; 47% of bad experiences lead customers to cut spending, and **Mexico has the highest share of spending at risk (8%)** of the countries studied. SQM Group (Feb 2025) finds that every 1-point gain in first call resolution raises interaction NPS by 1.4 points.

ACTIVITY Effort in my own life		
Purpose	Time	Materials
Connect effort to loyalty from your own experience as a customer	7 min	Pen, this page

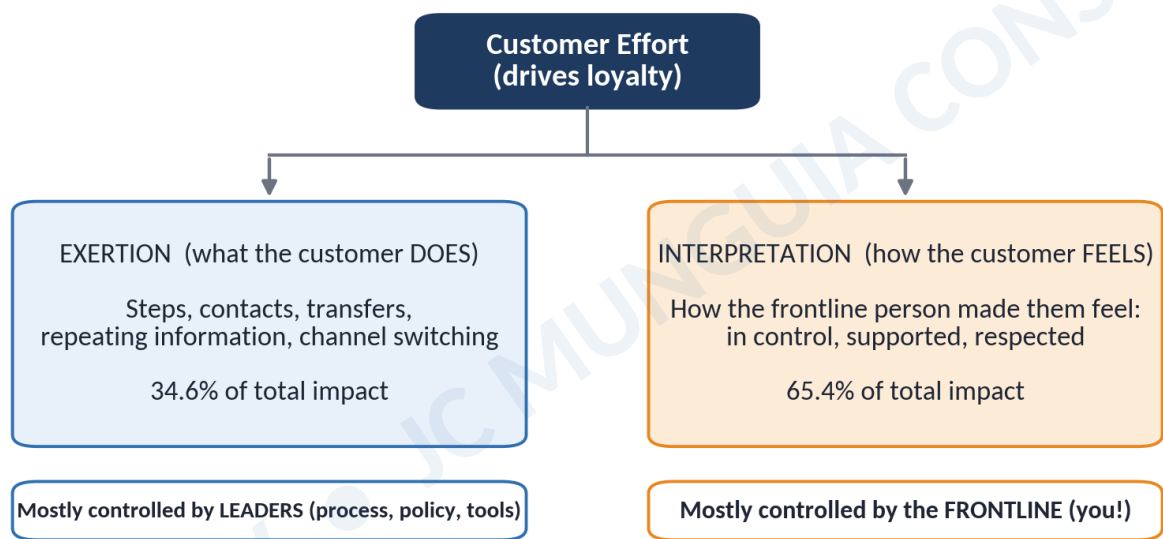
1. Write two sentences about a time a company made you work too hard as a customer (a bank, airline, phone company, government office).
2. Write how your own team or organization might unintentionally make customers work harder than necessary.
3. Share one example with the person next to you. Did the effort change what you did next as a customer?

My high-effort experience as a customer:

How we may unintentionally create effort for our customers:

1.4 What "effort" really means

Customer effort has two parts. **Exertion** is what the customer has to *do*: steps, contacts, transfers, repeating information, switching channels. **Interpretation** is how the customer *feels* about it: whether the frontline person made them feel supported and in control. In CEB's regression analysis (n = 4,589), interpretation carried **65.4%** of the impact on effort and exertion **34.6%**.



Examples of EXERTION (mostly controlled by leaders and process)	Examples of INTERPRETATION (mostly controlled by you)
• Number of contacts to solve one issue • Number of transfers • Repeating information already given (to the bot, to the IVR, to the last agent) • Being forced to switch channels ("please send us an email") • _____	• Flexibility shown by the frontline person • A visible willingness to help • Feeling that someone has taken control of the situation • Hearing what CAN be done, not only what cannot • _____

Leader lens

Exertion is 34.6% of the impact and it is largely designed by leaders: policies, IVR menus, tools, knowledge articles, transfer rules. The SQM 2025 benchmark finds the organization, not the agent, causes 49% of repeat calls. Leaders who only coach agents miss half the problem. See Module 6.

In the same CEB research, several classic soft skills showed **no measurable effect** on reducing effort, and two had only a marginal effect. Customers expect courtesy; it does not, by itself, reduce the work they must do or change how they interpret it.

- Showed concern
- Was non-scripted
- Understood the customer
- Listened well

*Being nice is the entry ticket,
not the differentiator.*

1.6 Traditional soft skills vs. experience engineering

Traditional soft skills	Customer Experience Engineering
1. Communication 2. Teamwork 3. Problem-solving 4. Time management 5. Emotional intelligence 6. Adaptability 7. Resilience 8. Empathy 9. Active listening 10. Conflict resolution	1. Customer-centricity 2. Empathy 3. Active listening 4. Problem-solving 5. Teamwork 6. Communication 7. Emotional intelligence 8. Adaptability 9. Resilience 10. Time management

Relationship focus	Outcome focus (experience engineering)
Relationship focus: The relationship between the customer and the company is the primary focus. This is often achieved through personalized service, loyalty programs, and direct communication channels.	Outcome focus: The primary focus is on the specific outcomes or experiences that the customer has. This is often achieved through data analysis, personalized recommendations, and targeted marketing campaigns.
Relationship focus: The relationship between the customer and the company is the primary focus. This is often achieved through personalized service, loyalty programs, and direct communication channels.	Outcome focus: The primary focus is on the specific outcomes or experiences that the customer has. This is often achieved through data analysis, personalized recommendations, and targeted marketing campaigns.



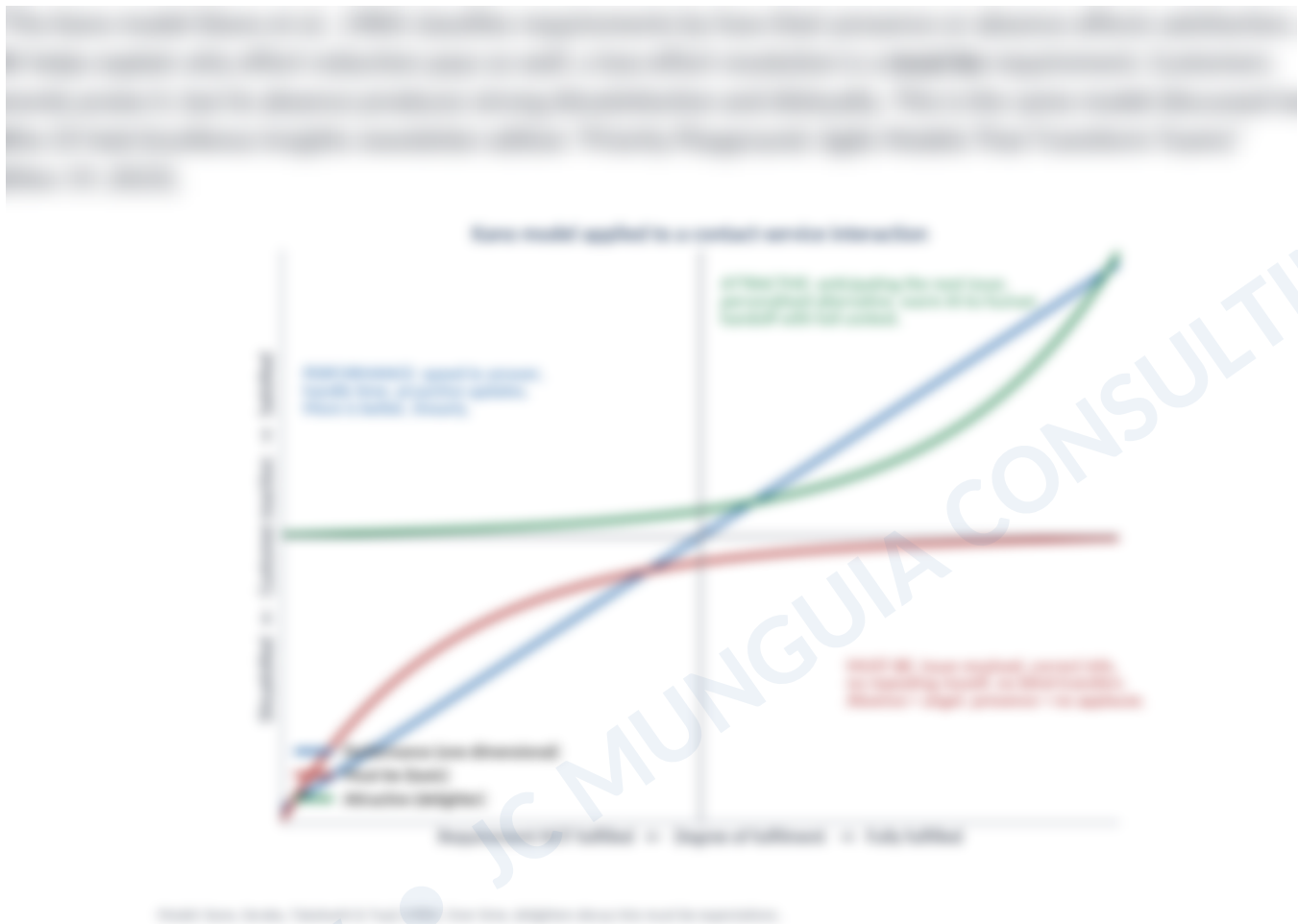
Part	Skills	What it does
What I hear	Listening skills	Helps you understand what the customer is saying and what they need.
How I respond	Communication skills	Helps you respond to the customer in a way that is helpful and professional.
Develop self-awareness	Self-awareness	Helps you understand your own strengths and weaknesses and how they affect your work.
Maintain self-awareness	Self-awareness	Helps you stay aware of your own emotions and how they affect your work.

1.9 How does this benefit me?

Day-to-day benefit	What changes
Improved customer service	Customers are more satisfied with the service they receive.
Increased sales	Customers are more likely to buy from you.
Reduced customer complaints	Customers are less likely to complain about your service.
Improved employee morale	Employees are more motivated and happy to work for you.

Scorecard metric	Expected effect
Customer satisfaction	Customers are more satisfied with the service they receive.
Employee satisfaction	Employees are more motivated and happy to work for you.
Customer retention	Customers are more likely to stay with you.
Employee retention	Employees are more likely to stay with you.

1.10 Where effort sits in the Kano model



Kano category	Contact-center examples	What to do
Must-be (basic)	Basic service requirements that are expected by customers. If not met, it causes dissatisfaction.	Ensure these are met consistently. They are the foundation of good service.
Performance	Service quality attributes that are directly proportional to customer satisfaction. The more, the better.	Continuously improve performance. Small improvements lead to noticeable increases in satisfaction.
Attractive (delighter)	Service attributes that are unexpected and cause high satisfaction when present, but no dissatisfaction when absent.	Identify and implement these to create wow moments and differentiate your service.
Indifferent	Service attributes that have no impact on customer satisfaction, either way.	Focus resources on other categories that drive satisfaction.
Reverse	Service attributes that cause dissatisfaction when present but satisfaction when absent.	Identify and eliminate these negative factors to improve the overall service experience.

Module 1 review

1. What is the main purpose of the Customer Experience Engineering process?

2. What are the key components of the Customer Experience Engineering process?

3. How does the Customer Experience Engineering process help in improving customer satisfaction?

4. What are the benefits of the Customer Experience Engineering process?

5. How can the Customer Experience Engineering process be implemented in an organization?

6. What are the challenges of the Customer Experience Engineering process?

7. How can the challenges of the Customer Experience Engineering process be overcome?

8. What are the key success factors for the Customer Experience Engineering process?

9. How can the Customer Experience Engineering process be used to improve the overall business performance?

10. What are the key takeaways from the Customer Experience Engineering process?

2

What I Hear

Skill 1 Active Listening and Skill 2 Purposeful Small Talk: getting the right information

Want the full content?

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

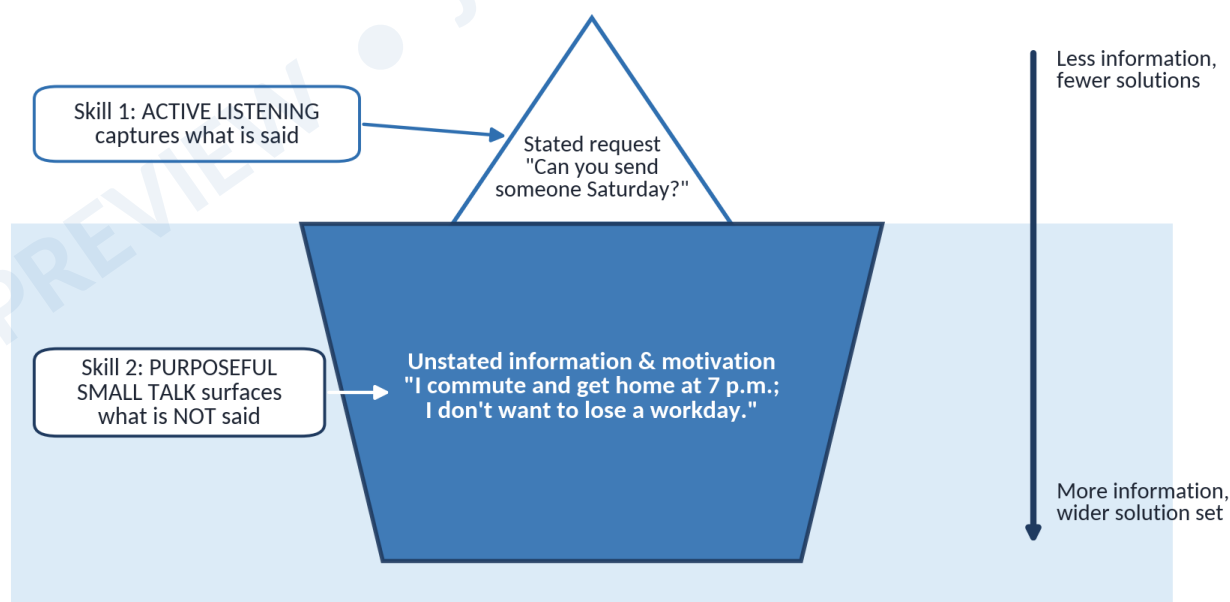
Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: linkedin.com/in/jc-munguia

Goal of this part of the framework

Collect all the information you need from the customer to offer the best possible solution. **Active listening** uses what the customer volunteers. **Purposeful small talk** uncovers the key information they did not volunteer.



Skill 1: Active listening

By the end of this section you will be able to:

- Identify the components of active listening
- Use active listening in customer cases and daily interactions, including chat and email (active reading)

Four qualities of active listeners

ATTENTION	OBJECTIVITY	PATIENCE	EMPATHY
Stay engaged and focused on what the customer is saying.			

Keeping your attention: four moves

Move	Confirm	Clarify	Paraphrase	Summarize
Examples				
Purpose				
Chat / email version				

Warning signs that you are NOT listening actively

1. You are thinking about what you are going to say next while the other person is speaking.
2. You are interrupting the other person before they have finished speaking.
3. You are not making eye contact with the other person.
4. You are not nodding or giving other feedback signals that you are listening.
5. You are not asking questions to clarify what the other person has said.

ACTIVITY Four qualities and low effort

1. The first quality is to be present. This means being fully focused on the person you are listening to. It means not thinking about other things or what you are going to say next.
2. The second quality is to be open. This means being willing to listen to what the other person has to say, even if it is different from what you expect or what you want to hear.
3. The third quality is to be curious. This means asking questions to learn more about what the other person is saying. It means showing interest in the other person's perspective.
4. The fourth quality is to be non-judgmental. This means not making assumptions or judgments about the other person or what they are saying. It means listening without trying to change or fix anything.

ACTIVITY Practicing active listening (pairs)

1. The first step is to choose a topic. This could be something that you are both interested in, or something that you have both experienced.
2. The second step is to take turns speaking and listening. One person speaks for a set time, and the other person listens. Then they switch roles.
3. The third step is to use the four qualities of active listening. The listener should be present, open, curious, and non-judgmental.
4. The fourth step is to give feedback. After each person has spoken, the listener should give feedback on what they heard. This could be a summary of what they heard, or a question to clarify something.

Skill 2: Purposeful small talk

By the end of this section you will be able to:

- Explain what purposeful small talk is and how it helps you
- Recognize opportunities for small talk and ask questions at the right level

Asking questions at the right level



Open- vs. closed-ended questions

Open-ended questions	Closed-ended questions
What are your thoughts on this? How do you feel about this? What do you think about this?	Do you like this? Is this good? Are you happy with this?

Speaker	Words	Agent's objective
Agent (Luis)	¿Qué hora es? ¿Qué hora es?	
Customer	¿Qué hora es?	
Agent (Luis)	¿Qué hora es? ¿Qué hora es? ¿Qué hora es?	¿Qué hora es? ¿Qué hora es? ¿Qué hora es?
Customer	¿Qué hora es? ¿Qué hora es?	¿Qué hora es? ¿Qué hora es?

Scenario	My question(s)	Information I could uncover

3

How I Respond

Skill 3 Positive Language, Skill 4 Advocacy, Skill 5 Alternative Positioning: guiding the conversation

Want the full content?

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: [linkedin.com/in/jc-munguia](https://www.linkedin.com/in/jc-munguia)

Goal of this part of the framework

Guide the conversation to present solutions in the best possible light.

Positive language: choose your words carefully to minimize customer effort.

Advocacy: champion the customer's issue and own its resolution.

Alternative positioning: match the customer's needs and motivations with the solutions available.

Skill 3: Positive language

By the end of this section you will be able to:

- Tell positive from negative language and describe the effect of each on the experience
- Recognize and avoid common words and phrases that create customer effort

It's not just you, it's everyone



What negative language leads to

Effect	Evidence

Small changes, big effects

Rep response A: negative language	Rep response B: positive language



Updated evidence: what newer research adds

Research shows that students who are motivated and have resources are more likely to succeed in their studies. This is because they are more likely to engage in the learning process and have the necessary tools to do so. On the other hand, students who lack motivation and resources are more likely to struggle and drop out of school. This is because they are less likely to engage in the learning process and may not have the necessary tools to do so. Therefore, it is important for educators to identify and address these issues in order to help all students succeed.

Research also shows that students who have a strong support system are more likely to succeed in their studies. This is because they are more likely to receive encouragement and help when they need it. On the other hand, students who lack a support system are more likely to struggle and drop out of school. This is because they may not have anyone to turn to when they need help. Therefore, it is important for educators to create a supportive environment for all students.

Say this, not that

From negative...	...to positive
I'm not sure if I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.
I'm not sure I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.
I'm not sure I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.

ACTIVITY Say this, not that: my own phrases

From negative...	...to positive
I'm not sure if I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.
I'm not sure I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.
I'm not sure I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.

Negative words and phrases I use	Positive, concrete translation
I'm not sure if I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.
I'm not sure I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.
I'm not sure I can do this.	I'm going to give it my best shot.
I don't know what to do.	I'm going to try to figure this out.
I'm not good at this.	I'm going to keep practicing.
I'm not sure I can handle this.	I'm going to take it one step at a time.

Skill 5: Alternative positioning

By the end of this section you will be able to:

- Use the information gathered during the conversation to position tailored solutions when the first option is not available



Principle	How
Identify the customer's needs and the company's capabilities.	Use the information gathered during the conversation to identify the customer's needs and the company's capabilities.
Position the solution based on the customer's needs and the company's capabilities.	Use the information gathered during the conversation to position the solution based on the customer's needs and the company's capabilities.
Communicate the solution to the customer.	Use the information gathered during the conversation to communicate the solution to the customer.

Decision tree: small talk and alternative positioning



Use small talk with customers who are...

Avoid it with customers who are...

What do you do when "no" is the only answer?

DO

DON'T

Revisiting the conversation: all five skills together

Speaker	Words	Skill in use
Customer	Hi, I'm having trouble with my account. I can't log in.	Identify the problem
Agent (Luis)	Hi, I'm sorry to hear that. Let me help you. Can you tell me what error message you're seeing?	Identify the problem, Acknowledge the problem, Offer help
Customer	It says "Invalid password". I've tried several times.	Identify the problem
Agent (Luis)	Okay, let's reset your password. I'll send you a link to your email. Please check your inbox.	Offer help, Provide instructions

ACTIVITY Role plays: responding with positive language

Scenario	Instructions
1. A customer is complaining about a delayed delivery.	Practice responding with empathy and offering a solution.
2. A customer is asking for a refund.	Practice responding with understanding and providing the refund process.
3. A customer is asking for a discount.	Practice responding with a polite refusal and offering an alternative.
4. A customer is asking for a recommendation.	Practice responding with helpful suggestions.
5. A customer is asking for a status update.	Practice responding with clear and concise information.
6. A customer is asking for a callback.	Practice responding with a clear timeline for the callback.
7. A customer is asking for a receipt.	Practice responding with a clear explanation of the process.
8. A customer is asking for a warranty.	Practice responding with a clear explanation of the warranty terms.
9. A customer is asking for a replacement.	Practice responding with a clear explanation of the replacement process.
10. A customer is asking for a refund.	Practice responding with a clear explanation of the refund process.

4

Develop and Maintain Self-Awareness

Skill 6 Understanding My Dominant Personality Style and Skill 7 Flexing to Others' Personalities

Want the full content?

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: linkedin.com/in/jc-munguia

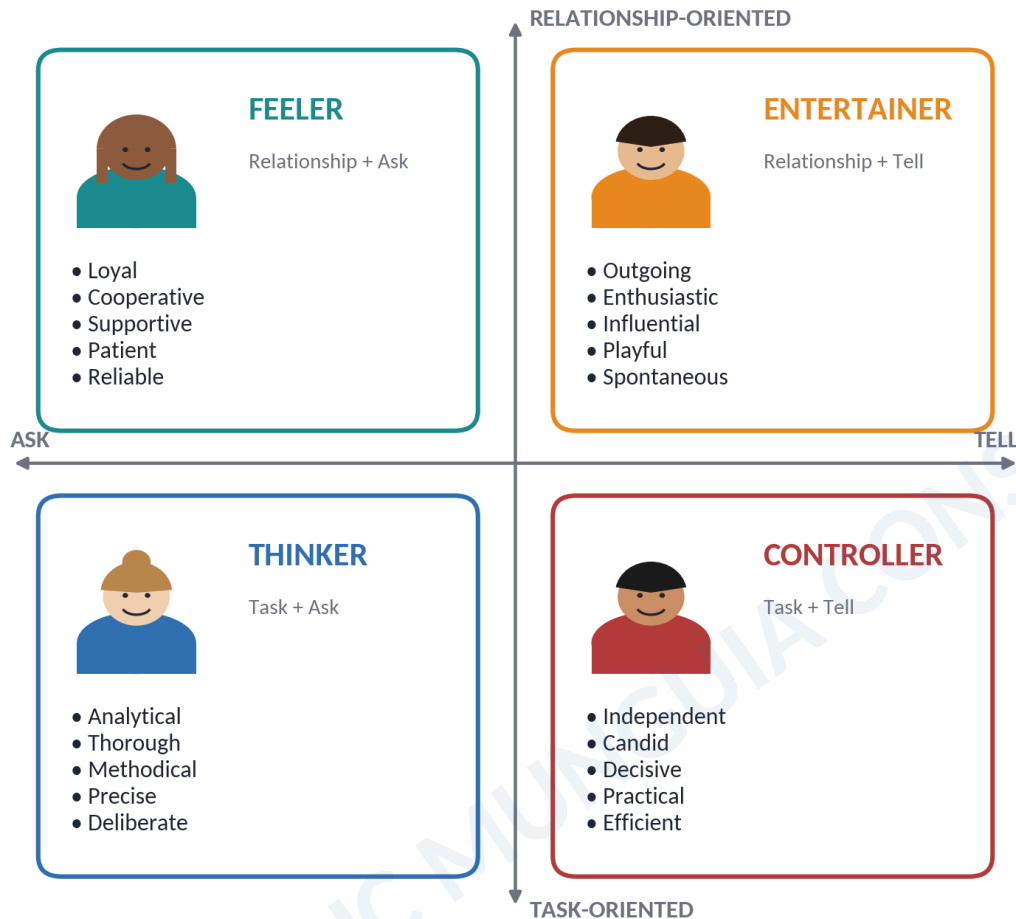
Goal of this part of the framework

Keep control of your own actions in stressful situations without burning out. To manage customer interactions, you first have to manage yourself. Knowing your style is the foundation that lets you keep listening, making purposeful small talk, using positive language, advocating and positioning solutions, even under stress.

Skill 6: Understanding my dominant personality style

By the end of this section you will be able to:

- Identify your personality style and how it is uniquely suited to serving customers
- Recognize your style's stress response and choose ways to cope with and manage stress



Customer service by personality style

Style	Strengths	Keep in mind
Feeler		
Entertainer		
Thinker		
Controller		

ACTIVITY **How my style fits experience engineering**

1. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

2. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

3. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

4. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

5. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

Skill	My rating (1-5)	One thing I will do to strengthen it
1 Active listening		
2 Purposeful small talk		
3 Positive language		
4 Advocacy		
5 Positioning solutions		

How each style reacts to stress

1. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

2. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

3. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

4. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)

5. How often do you use the following skills? (1 = Never, 2 = Sometimes, 3 = Often, 4 = Always)



Style	Stress response	Early warning signs (write your own)	Recovery tactic
Feeler			
Entertainer			
Thinker			
Controller			

Skill 7: Flexing to others' personalities

By the end of this section you will be able to:

- Identify your customers' personality styles
- Adapt your approach to interact effectively with each style



Style	They sound like	Traits	Remember to
Feeler (empathy-oriented)	They are very empathetic and care about others' feelings.	They are very empathetic and care about others' feelings.	They are very empathetic and care about others' feelings.
Entertainer (social-oriented)	They are very social and enjoy being the center of attention.	They are very social and enjoy being the center of attention.	They are very social and enjoy being the center of attention.
Thinker (process-oriented)	They are very logical and enjoy analyzing problems.	They are very logical and enjoy analyzing problems.	They are very logical and enjoy analyzing problems.
Controller (results-oriented)	They are very results-oriented and want to get things done quickly.	They are very results-oriented and want to get things done quickly.	They are very results-oriented and want to get things done quickly.

Flexing guide: if you are... and they are...

You are ↓ / They are →	Controller	Thinker	Entertainer	Feeler
Controller				
Thinker				
Entertainer				
Feeler				

ACTIVITY

Role plays: personality-based communication

1. The facilitator will assign participants to pairs. Each pair will be given a scenario and a list of personality traits. The participants will have 5 minutes to prepare a role play based on the scenario and the personality traits.
2. The facilitator will then ask each pair to perform their role play for the class. The class will then discuss the role play and the personality traits used.
3. The facilitator will then ask each pair to perform their role play for the class. The class will then discuss the role play and the personality traits used.
4. The facilitator will then ask each pair to perform their role play for the class. The class will then discuss the role play and the personality traits used.
5. The facilitator will then ask each pair to perform their role play for the class. The class will then discuss the role play and the personality traits used.
6. The facilitator will then ask each pair to perform their role play for the class. The class will then discuss the role play and the personality traits used.

5

Experience Engineering in the AI Era

Applying the seven skills in hybrid (AI + human) journeys and digital channels

Want the full content?

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: linkedin.com/in/jc-munguia

By the end of this section you will be able to:

- Explain how AI and self-service change what reaches the human agent
- Handle a customer who arrives after a failed bot or self-service attempt without adding effort
- Apply the seven skills in chat, email and messaging, and when using AI agent-assist tools

5.1 What the 2025-2026 data says

Finding	What it means for you	Source (date)
Customers want to interact with AI, but only if it's helpful and transparent.	AI should be used to assist, not replace, human agents. Transparency is key.	McKinsey, 2025
Customers value speed and efficiency in their service journey.	Streamline processes and reduce wait times. AI can help with quick resolutions.	Accenture, 2025
Customers expect personalized experiences.	Use AI to analyze customer data and tailor interactions.	Deloitte, 2025
Customers want to feel heard and understood.	Empower agents with AI tools to better understand customer needs.	Capgemini, 2025
Customers are more likely to stay loyal if they have a positive experience.	Invest in AI to improve service quality and customer satisfaction.	IBM, 2025
Customers are more likely to use self-service options if they are easy to use.	Design intuitive self-service interfaces and provide clear instructions.	Oracle, 2025
Customers are more likely to use AI if they trust it.	Build trust through transparency and consistent performance.	Microsoft, 2025
Customers are more likely to use AI if they see the value.	Communicate the benefits of AI and demonstrate its capabilities.	Google, 2025
Customers are more likely to use AI if they feel it's secure.	Implement robust security measures and data protection protocols.	Amazon, 2025
Customers are more likely to use AI if they feel it's reliable.	Ensure AI systems are accurate and consistent in their responses.	Facebook, 2025

Engineering the hybrid (AI + human) journey



Agent opening after a failed bot: "I can see you already tried the assistant and gave us your account and the error code. I've got it here, so you won't need to repeat anything."

5.2 The seven skills after a failed bot

Skill	What to do in the first 60 seconds
1. Acknowledge the failure	Recognize the customer's frustration and apologize for the bot's failure.
2. Offer assistance	Offer to help the customer resolve their issue or provide a refund.
3. Listen actively	Listen to the customer's explanation of the problem and their desired outcome.
4. Empathize	Express empathy for the customer's situation and show understanding.
5. Provide a solution	Offer a clear, actionable solution to the customer's problem.
6. Follow up	Follow up with the customer to ensure the solution was effective and they are satisfied.
7. Learn from the failure	Use the customer's feedback to improve the bot's performance and prevent future failures.

5.3 Digital-channel adaptations

Channel	Do	Avoid
Chat / messaging	Respond quickly and use emojis to show empathy.	Use generic, impersonal responses.
Email	Use a professional and friendly tone.	Use a formal, robotic tone.
Agent-assist / GenAI drafts	Use AI to generate drafts and suggestions.	Use AI to generate final responses without human oversight.
Social / public	Respond publicly and quickly.	Use generic, impersonal responses.
Watch out: critical errors in the AI era		
The AI era brings new challenges and risks. Critical errors can occur, such as AI-generated content that is biased, discriminatory, or harmful. It is essential to have robust safeguards in place to prevent such errors and ensure that AI is used responsibly and ethically.		

6

Leading by Example (Leader Track)

Your customers are your agents: using the same standard to build a low-effort culture

Want the full content?

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: linkedin.com/in/jc-munguia

By the end of this section you will be able to:

- Apply the seven skills with agents, who are the leader's internal customers
- Run COPC R8.0-aligned monitoring, coaching and calibration that reinforce experience engineering
- Measure and reduce both customer effort and agent (CSS) effort
- Lead team rituals that make low effort the way the team works

6.1 The parallel process

The parallel process: how leaders treat agents is how agents treat customers



Employee effort (CSS effort) is an explicit input in COPC CX Standard R8.0, Item 3.9 (Optimizing Service Journeys).

Updated evidence (2026)

6.2 The seven skills, leader version

Skill	With customers (agent)	With agents (leader)	Leader example (ACME, Dana)
1 Active listening			
2 Purposeful small talk			
3 Positive language			
4 Advocacy			
5 Alternative positioning			
6 Self-awareness			
7 Flexing			

6.3 The Experience-Engineered Coaching Conversation (5 steps)

Step	What the leader does	Skills	Sample words
1. Open and listen			
2. Reinforce what worked			
3. Focus on one opportunity			
4. Remove obstacles			
5. Commit and follow up			

6.4 Monitoring, calibration and coaching aligned with COPC R8.0

Figure 6.4 illustrates the relationship between the four key activities of the COPC R8.0 framework: Monitoring, Calibration, Coaching, and Training. The diagram shows a cyclical flow between these activities, with Monitoring at the top, Calibration on the right, Coaching at the bottom, and Training on the left. The central focus is the 'COPC R8.0 Framework'.



Requirement (summary)	COPC R8.0 item	How CXE applies it
Requirement 1: The organization shall have a process to identify and manage customer expectations.	1.1	Identify and manage customer expectations through a process of continuous improvement.
Requirement 2: The organization shall have a process to identify and manage customer needs.	2.1	Identify and manage customer needs through a process of continuous improvement.
Requirement 3: The organization shall have a process to identify and manage customer wants.	3.1	Identify and manage customer wants through a process of continuous improvement.
Requirement 4: The organization shall have a process to identify and manage customer desires.	4.1	Identify and manage customer desires through a process of continuous improvement.
Requirement 5: The organization shall have a process to identify and manage customer expectations.	5.1	Identify and manage customer expectations through a process of continuous improvement.
Requirement 6: The organization shall have a process to identify and manage customer needs.	6.1	Identify and manage customer needs through a process of continuous improvement.
Requirement 7: The organization shall have a process to identify and manage customer wants.	7.1	Identify and manage customer wants through a process of continuous improvement.
Requirement 8: The organization shall have a process to identify and manage customer desires.	8.1	Identify and manage customer desires through a process of continuous improvement.
Requirement 9: The organization shall have a process to identify and manage customer expectations.	9.1	Identify and manage customer expectations through a process of continuous improvement.
Requirement 10: The organization shall have a process to identify and manage customer needs.	10.1	Identify and manage customer needs through a process of continuous improvement.

6.5 Measuring effort: the leader's dashboard

Metric	Definition	Why it matters	Typical direction
Customer Effort Score (CES)	How easy it is for customers to get their problem solved	Lower scores indicate less effort, which is better	Down
First Contact Resolution (FCR)	Percentage of issues resolved on the first contact	Higher percentages indicate better service	Up
Repeat contact rate (7 days)	Percentage of customers who contact again within 7 days	Lower percentages indicate better service	Down
Transfer rate	Percentage of calls transferred to another agent	Lower percentages indicate better service	Down
CSAT top box and DSAT	Customer Satisfaction (top box) and Dissatisfaction (bottom box)	Higher top box and lower bottom box indicate better service	Up (top box), Down (bottom box)
Customer critical error accuracy	Percentage of critical errors correctly identified	Higher percentages indicate better service	Up
Agent effort / eNPS	Employee Net Promoter Score	Higher scores indicate better service	Up



Worked example: calculating CES and the value of FCR

The Customer Effort Score (CES) is a measure of how easy it is for customers to get their problem solved. It is calculated using the following formula:

$$CES = \frac{1}{1 + \ln(\frac{1}{FCR})}$$

Where FCR is the First Contact Resolution rate. For example, if the FCR is 90%, the CES would be:

$$CES = \frac{1}{1 + \ln(\frac{1}{0.9})} = \frac{1}{1 + \ln(1.111)} = \frac{1}{1 + 0.105} = \frac{1}{1.105} = 0.904$$

The value of FCR is also a key metric for measuring effort. It is calculated as the percentage of issues resolved on the first contact. For example, if 90% of issues are resolved on the first contact, the FCR is 90%.

6.6 Building the culture: team rituals

Ritual	Frequency	How it works
Effort huddle	15-20 min	At the start of each day, team members share their top priority for the day and the effort they will put into it.
Effort hunt	15-20 min	At the end of each day, team members share their top priority for the day and the effort they put into it.
Golden calls	15 min	At the start of each day, team members share their top priority for the day and the effort they will put into it.
Leader self-check	15 min	At the start of each day, the leader shares their top priority for the day and the effort they will put into it.
Kano backlog	15 min	At the start of each day, the leader shares their top priority for the day and the effort they will put into it.

Watch out: leader behaviors that destroy the culture

ACTIVITY	Leader practice: flip the scenario
1. The leader shares their top priority for the day and the effort they will put into it. 2. The team members share their top priority for the day and the effort they will put into it. 3. The leader shares their top priority for the day and the effort they will put into it. 4. The team members share their top priority for the day and the effort they will put into it.	

7

Topic Facilitation, Summary and Next Steps

Teach it back, commit to it, and put it to work tomorrow

Want the full content?

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: [linkedin.com/in/jc-munguia](https://www.linkedin.com/in/jc-munguia)

ACTIVITY Topic facilitation (team practice)

Activity	Topic	Facilitator
1. Review the topic and its components.	Topic 1: Customer Experience Engineering	Juan Carlos Munguia
2. Discuss the importance of customer experience engineering.	Topic 2: Customer Experience Engineering	Juan Carlos Munguia
3. Identify the key components of customer experience engineering.	Topic 3: Customer Experience Engineering	Juan Carlos Munguia
4. Discuss the importance of customer experience engineering.	Topic 4: Customer Experience Engineering	Juan Carlos Munguia
5. Identify the key components of customer experience engineering.	Topic 5: Customer Experience Engineering	Juan Carlos Munguia
6. Discuss the importance of customer experience engineering.	Topic 6: Customer Experience Engineering	Juan Carlos Munguia
7. Identify the key components of customer experience engineering.	Topic 7: Customer Experience Engineering	Juan Carlos Munguia
8. Discuss the importance of customer experience engineering.	Topic 8: Customer Experience Engineering	Juan Carlos Munguia
9. Identify the key components of customer experience engineering.	Topic 9: Customer Experience Engineering	Juan Carlos Munguia
10. Discuss the importance of customer experience engineering.	Topic 10: Customer Experience Engineering	Juan Carlos Munguia

Summary

Summary of your experience and learning outcomes.

1. What were the key challenges you faced during the project?

2. How did you overcome these challenges?

3. What were the key learnings from this experience?

4. How will you apply these learnings in your future work?

5. What advice would you give to others who are starting a similar project?

My first three steps

My first three steps to achieve my goal are:

1. Define the goal and scope of the project.
2. Identify the key stakeholders and their roles.
3. Develop a detailed project plan and timeline.

4. I will measure the progress of the project by tracking the completion of tasks and the achievement of milestones.

5. I will ensure that the project is completed on time and within budget.

30-60-90 day plan

Horizon	My goal	How I'll measure it	Who will support me
30 days			
60 days			
90 days			

Appendix A. Phrasebook: say this, not that

Situation	Avoid	Say instead
Opening after a failed bot	"I'm sorry, but I can't help you with that."	"I'm sorry, but I can't help you with that. Let me see if I can find someone who can."
Can't do it now	"I can't do that for you right now."	"I can't do that for you right now, but I can help you with that later. Let me see if I can find someone who can."
Out of stock	"We're out of stock of that item."	"We're out of stock of that item, but we have a similar item that might work for you. Let me see if I can find that for you."
Transfer	"I'm sorry, but I can't help you with that. I'll transfer you to someone who can."	"I'm sorry, but I can't help you with that. Let me see if I can find someone who can help you with that."
Policy	"I'm sorry, but that's against our policy."	"I'm sorry, but that's against our policy. Let me see if I can find a way to help you with that."
Customer error	"You made a mistake. You need to do this."	"I'm sorry, but it looks like there was a mistake. Let me see if I can help you with that."
Waiting	"I'm sorry, but you'll have to wait a while."	"I'm sorry, but you'll have to wait a while. Let me see if I can find a way to help you with that."
Uncertain outcome	"I'm sorry, but I can't guarantee that this will work for you."	"I'm sorry, but I can't guarantee that this will work for you. Let me see if I can find a way to help you with that."
Complaint	"I'm sorry, but I can't help you with that. I'll transfer you to someone who can."	"I'm sorry, but I can't help you with that. Let me see if I can find someone who can help you with that."
Closing	"I'm sorry, but I can't help you with that. I'll transfer you to someone who can."	"I'm sorry, but I can't help you with that. Let me see if I can find someone who can help you with that."
Leader to agent: feedback	"I'm sorry, but I can't help you with that. I'll transfer you to someone who can."	"I'm sorry, but I can't help you with that. Let me see if I can find someone who can help you with that."
Leader to agent: can't grant a request	"I'm sorry, but I can't help you with that. I'll transfer you to someone who can."	"I'm sorry, but I can't help you with that. Let me see if I can find someone who can help you with that."

Appendix B. Main contact drivers and KPIs

Appendix C. Glossary

Appendix D. Program documents and key references

Code	Document
001	Introduction to Customer Experience Engineering
002	Customer Experience Engineering Framework
003	Customer Experience Engineering Process
004	Customer Experience Engineering Tools
005	Customer Experience Engineering Best Practices
006	Customer Experience Engineering Case Studies
007	Customer Experience Engineering Implementation
008	Customer Experience Engineering Evaluation
009	Customer Experience Engineering Summary

Customer Experience Engineering is a process of understanding and improving the customer experience. It involves identifying customer needs, designing solutions, and implementing and evaluating the solutions. Customer Experience Engineering is a key component of Customer Experience Management (CEM) and is essential for creating a competitive advantage.

Get the full certification program

You have seen the map. The full edition gives your team the whole journey:

- The complete 49-page Participant Manual: seven skills, AI-era journeys, and the Leader Track (leading by example)
- Assessment A and B: theoretical exams for agents and leaders
- Assessment C and D: practical certification with role plays and live interactions, COPC R8.0-aligned scorecards
- Facilitator Guide with answer keys, actor briefs and evaluator calibration
- Evidence and Sources Pack with 2024-2026 data and verification links
- Implementation support: tailoring to your operation, train-the-trainer, and measurement of effort (CES, FCR, repeat contacts)

Book your free consultation session

This **free preview** shows the structure and about 30% of the Customer Experience Engineering Participant Manual. The full program includes every skill, tool, script, updated 2024-2026 data, the leader track, and four certification assessments (theory + role plays + live interactions).

Book a free 30-minute consultation to see how it fits your team: **Juan Carlos Munguia**, Continuous Improvement Consulting

Email: contact@jcmunguia.com

• LinkedIn: linkedin.com/in/jc-munguia

Preview edition. Content protected; please do not copy or redistribute. © 2026 Juan Carlos Munguia.