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ENGINEERING THE EMPLOYEE EXPERIENCE

Competencies Book

Values, agent and leadership competencies for
service operations

*Service operations that work. Because the people
running them do.*

Free example edition · 2026 · Juan Carlos Munguia | Consultoría de Mejora
Continua

Adapted to your organization in the EEX Foundation program

Why a competencies book

How to read and use this book

Performance, made visible

Performance management is how an organization agrees what good work looks like, observes it, and helps people grow toward it. It works only when everyone uses the same words for the same behaviors.

What a competency is

A competency is an observable way of working that separates strong performance from weak performance: what a person knows, what they deliver, and how they behave while delivering it.

How this book is organized

Three matrices, each with a definition and five levels, from 5 (role model) down to 1:

1. **Core values** for every role
2. **Agent competencies** for frontline roles
3. **Leadership competencies** for supervisors and managers

How it is used

Each person is rated on the values and on their own set, with one piece of evidence per rating, in a self, manager and peer review. The gaps become a development plan, reviewed every month.

The level scale

One scale for every matrix. Level 3 is the expected standard for the role.

Level 5

Top Performer · Role model. Sets the standard others follow. Shares knowledge and experience proactively, follows through on own initiatives, and visibly changes how others work.

Level 4

Strong Performer · Exceeds expectations. All required knowledge, skills and behaviors are observable consistently, and the person improves the work of others. Promotable.

Level 3

Strong Performer · Meets expectations (the standard). Performs consistently and independently, with evidence. This is the expected level for the role.

Level 2

Developing · Meets some expectations. Behavior is emerging and inconsistent. Performs well in familiar situations or with supervision; clear opportunity areas.

Level 1

Developing · Does not yet meet expectations. Little or no observable evidence of the knowledge, skills or behaviors required.

The career path

Five roles, two competency sets. Each step adds scope and a knowledge credential.

Role	Competency set	Scope	Knowledge credential	Experience
1 • Customer Care Agent	Agent	Handles customer contacts in one or more channels	CXE agent track	0–1 year
2 • Senior Agent / SME	Agent	Complex cases, escalations and new-hire mentoring	CXE agent certified + LSS Yellow Belt	1–3 years
3 • Team Lead / Supervisor	Leader	A team of about 12–18 agents	CXE leader track + LSS Yellow Belt	2+ years
4 • Operations Manager	Leader	Several teams or a line of business	LSS Green Belt	4+ years
5 • Senior Manager / Director	Leader	A site, account or region	LSS Black Belt	7+ years

Moving from Senior Agent to Team Lead is the step from the agent set to the leadership set. Readiness is checked with the leadership matrix, at level 2 or above, before the move. CXE = Engineering the Customer Experience internal certification; LSS = Lean Six Sigma internal certification.

PART 1

Core Values

Five values every person is rated on, from agent to director. They describe how we work together, whatever the role.



Evidence First

We go and see, measure, then decide. Honest numbers beat confident opinions, including our own.

Decisions are based on validated data and direct observation of the work (gemba), not on habit, rank or opinion. It includes stating assumptions openly and being willing to be proven wrong.

Level 5

Sets the evidence standard for the team and the organization; teaches others to question their own numbers.

Level 4

Challenges weak data with respect; builds measurement that others trust.

Level 3

Bases findings on validated data and observation; states assumptions openly.

Level 2

Uses data when asked; checks sources inconsistently.

Level 1

Decides on opinion or habit; uses data only to justify a decision already made.



People Before Process

Processes are designed for the people who run them. Agents treat customers the way they are treated.

Every process, tool and metric is designed with the people who do the work, and its effect on their effort and wellbeing is checked. People are never treated as the default cause of a defect.

Level 5

Changes how leaders treat their teams; recognized as the people-side voice of the organization.

Level 4

Uses psychology (motivation, emotional intelligence, personal styles) so changes stick; protects team wellbeing.

Level 3

Designs changes with frontline input; checks workload and effort for employees as well as customers.

Level 2

Considers the impact on people only when others raise it.

Level 1

Treats people as the cause of every defect; ignores their effort and wellbeing.



Calm Clarity

We stay calm under pressure and speak directly, with respect. Clear beats clever; no drama.

The ability to stay composed in difficult moments and communicate with directness and respect. It includes separating facts from emotions and choosing clarity over complexity.

Level 5

Models calm leadership; coaches others to hold hard conversations well.

Level 4

De-escalates conflict between people or teams; brings calm to crisis meetings.

Level 3

Communicates directly and respectfully under pressure; separates facts from emotions.

Level 2

Stays calm in routine situations; becomes vague or reactive when things get tense.

Level 1

Reacts emotionally or avoids difficult conversations.



Small Steps, Every Day

Improvement is a daily habit, not a project. We learn from every result and share the lesson.

Continuous improvement practiced as a routine: short review cycles, feedback turned into specific adjustments, and lessons shared so the whole team improves.

Level 5

Creates the improvement routines and knowledge base others use; leads by example.

Level 4

Builds lessons-learned loops into the team's work; helps peers improve.

Level 3

Runs daily and weekly reviews; turns feedback into specific adjustments.

Level 2

Reflects when prompted; applies lessons occasionally.

Level 1

Repeats the same mistakes; ignores feedback.



Build to Hand Over

We build capability, not dependency. If the client still needs us after a year, we didn't do our job.

Knowledge is documented, taught and certified so others can run the work without us. Success is measured by what keeps working after we step away.

Level 5

Designs work that leaves self-sustaining capability; results keep improving after they step away.

Level 4

Develops people who train others; the team runs the process without support.

Level 3

Documents, trains and certifies owners; hands over on time.

Level 2

Documents work when reminded; handovers are incomplete.

Level 1

Keeps knowledge to self; creates reliance on one person.

PART 2

Agent Competencies

Six competencies for Customer Care Agents and Senior Agents: how the work is done, day to day, with customers and peers.

Communication

Listens fully, confirms understanding and explains clearly, in plain words. Adapts tone and language to each customer and channel, spoken and written.

Level 5

A model communicator: turns difficult conversations into positive outcomes and helps peers improve their macros, templates and knowledge articles.

Level 4

Reads unspoken needs; adapts tone and words to each customer's style; written replies need no correction; gives useful input in huddles.

Level 3

Listens without interrupting, paraphrases to confirm, explains next steps clearly and uses positive language with correct grammar across channels.

Level 2

Clear in routine contacts but uses the same script for everyone; sometimes skips confirming understanding; written replies need edits.

Level 1

Interrupts or talks over customers; explanations are vague or confusing; frequent errors in writing.

Self-Leadership

Owens their results, development and example. Motivates themselves and supports peers without being asked.

Level 5

An informal leader: peers seek them out, they mentor new hires, volunteer for pilots and lead small improvements.

Level 4

Owens results beyond target; asks for feedback and acts on it quickly; supports peers who struggle.

Level 3

Owens each contact through to resolution; follows through on commitments; acts on coaching feedback.

Level 2

Owens results when supervised; waits for direction; accepts feedback but changes little.

Level 1

Blames others, systems or customers; avoids responsibility; resists feedback.

Organized

Plans their own time and workload, follows schedules and procedures, and keeps records complete and in order.

Level 5

Designs personal routines others copy; proposes improvements to schedules, queues or tools.

Level 4

Anticipates volume peaks; manages backlog proactively; records are complete and audit-ready.

Level 3

Meets schedule adherence; follows procedures; documents every case completely and on time.

Level 2

Mostly on schedule; case notes are incomplete; backlog grows when volume rises.

Level 1

Often late or out of adherence; loses track of cases; skips documentation.

Analytical Thinker

Understands the whole case, finds the real cause of the customer's problem, uses the right tools and knowledge, and spots chances to improve.

Level 5

Detects patterns across contacts and reports root causes that lead to process or product fixes.

Level 4

Solves complex or unusual cases independently; connects the case to other processes; suggests improvements.

Level 3

Asks the right questions, finds the root of the issue, uses the knowledge base and tools correctly and resolves on first contact.

Level 2

Resolves standard cases; escalates anything new; uses tools partially.

Level 1

Treats symptoms only; misdiagnoses; transfers or escalates without trying.

Results Driven

Delivers quality, resolution and satisfaction targets, adapts to change at the pace the operation needs, and speaks up when something blocks the result.

Level 5

Consistently in the top quartile; helps the team reach its goals; champions new changes.

Level 4

Exceeds targets; adapts quickly to new processes; raises blockers together with a proposed solution.

Level 3

Meets quality, resolution, satisfaction and productivity targets; adopts new procedures on time; escalates blockers assertively.

Level 2

Meets some targets; slow to adapt; raises problems late.

Level 1

Regularly misses targets; resists change; stays silent about blockers.

Integrity

Acts honestly and ethically, protects customer data, treats everyone with respect and stays composed under pressure.

Level 5

A reference for ethics and respect; steps in when others cross a line; a calm anchor for the team in a crisis.

Level 4

Handles abusive or tense contacts with composure; reports risks and compliance issues proactively.

Level 3

Follows data-protection and compliance rules; keeps honest records; respects diverse customers and peers; stays composed.

Level 2

Follows rules when reminded; occasionally loses composure.

Level 1

Breaches data or ethics rules; is disrespectful; often loses composure.

PART 3

Leadership Competencies

The same six areas, raised to leadership scope, for Team Leads, Supervisors, Operations Managers and Directors.

Engaging Communication

Listens to the team and stakeholders, keeps information flowing up and down, makes sure it is accurate, and adapts the message from agent to executive.

Level 5

Shapes how the organization communicates performance; a trusted voice with executives and clients.

Level 4

Turns data into clear decisions; delivers hard messages (changes, bad news) with transparency and empathy.

Level 3

Runs effective huddles and one-to-ones; shares accurate, timely information; tailors reports to each audience; gives regular feedback.

Level 2

Shares information inconsistently; one style for every audience; gives feedback only at review time.

Level 1

Withholds information or shares it late; messages are unclear; feedback discourages the team.

Lead

Creates a climate where the team performs, builds relationships, motivates and mentors people, owns the team's results and influences others when needed.

Level 5

Develops future leaders; the team is a reference for engagement and results; influences across the organization.

Level 4

Builds a high-trust team; coaches consistently; influences peers and senior stakeholders.

Level 3

Sets clear goals, recognizes contributions, coaches weekly and owns team results without blaming.

Level 2

Directs tasks rather than developing people; recognition is rare; ownership is partial.

Level 1

Micromanages or is absent; blames the team; creates a climate of fear or indifference.

Organized Execution

Builds and staffs the team, plans the work for results, runs the operating routines and resolves conflict.

Level 5

Designs operating routines and staffing models used across teams or sites.

Level 4

Balances several teams or priorities; anticipates staffing and volume risks; prevents conflict through structure.

Level 3

Keeps a clear plan with defined roles; runs daily and weekly reviews; resolves team conflict early and fairly.

Level 2

Plans only short term; routines are inconsistent; handles conflict only when escalated.

Level 1

Disorganized; misses deadlines; conflict escalates or is ignored.

Systems Thinker

Sees the whole operation, solves problems with data, chooses the right improvement tools and looks for chances to improve outcomes.

Level 5

Frames strategic problems; pioneers methods (AI-enabled quality, automation) that others adopt.

Level 4

Links issues across processes and teams; leads improvement projects; finds opportunities others miss.

Level 3

Uses data and root-cause tools (Pareto, fishbone, 5 whys) to fix team problems; anticipates knock-on effects of decisions.

Level 2

Solves problems case by case; uses data when prompted.

Level 1

Decides on opinion; repeats the same fixes; ignores data.

Drives Results & Change

Resolves operational problems, keeps stakeholders engaged, leads change at the pace the business needs and is assertive when necessary.

Level 5

Turns around difficult operations; results hold over time; recognized as a change agent.

Level 4

Accelerates results under pressure; wins buy-in for change; pushes back constructively on unrealistic demands.

Level 3

Delivers team KPIs; implements changes on time; keeps stakeholders informed; is assertive when needed.

Level 2

Delivers some KPIs; change is slow; avoids difficult pushback.

Level 1

Misses KPIs; resists or ignores change; passive with stakeholders.

Integrity & Fairness

Committed to the team and the organization, acts ethically, handles adversity well, leads diverse teams fairly and resolves issues objectively.

Level 5

Sets the ethical standard; trusted with the most sensitive people issues.

Level 4

Holds the team to ethical standards; stays composed in adversity; champions inclusion.

Level 3

Acts with integrity; applies policies consistently; decisions are objective and free of favoritism; respects diversity.

Level 2

Mostly fair, with occasional favoritism or inconsistency.

Level 1

Makes unfair or unethical decisions; loses composure; tolerates disrespect.

Required level by role

The minimum level each role needs. Values apply to everyone.

Agent roles

Role	Values	Communication	Self-Leadership	Organized	Analytical Thinker	Results Driven	Integrity
Customer Care Agent	3	3	3	3	2	3	3
Senior Agent / SME	3	4	4	3	4	4	3

Leadership roles

Role	Values	Engaging Communication	Lead	Organized Execution	Systems Thinker	Drives Results & Change	Integrity & Fairness
Team Lead / Supervisor	4	3	3	3	3	3	3
Operations Manager	4	4	4	4	4	4	4
Senior Manager / Director	4	5	5	4	5	5	5

How to rate with evidence

Four rules that keep ratings fair and comparable

1. Rate behavior, not personality

Choose the level whose description matches what you observed most of the time during the period, not a single good or bad day.

2. One piece of evidence per rating

A quality evaluation, a coaching note, a customer comment, a record. No evidence, no rating above 2.

3. Several points of view

Self, manager and two peers rate the same matrix. The average is discussed, not imposed.

4. Gaps become a plan

The two or three gaps that matter most for the role go into the development plan, with a target level, a date and the evidence that will show progress.

Suggested weighting · Agents: 50% KPIs, 30% competencies, 20% values · Leaders: 40% KPIs, 40% competencies, 20% values. Each organization sets its own.

Make it yours

This example edition is built for a fictitious service operation

In the Engineering the Employee Experience programs, the values, competencies, levels and career path are rebuilt with your leaders and your data, then your managers are certified to run the review cycle on their own.

Foundation	Build	Transform
2 months · teams up to 30	4 months · 30 to 150 people	6 months · more than 150 people

Book a free 30-minute call

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References: Project Management Institute (2017), *Project Manager Competency Development Framework*, 3rd ed.; Alles, M. A. (2004), *Diccionario de comportamientos: gestión por competencias*. The definitions and level descriptions in this book are original work by Juan Carlos Munguia Salcido and are not affiliated with or endorsed by PMI. © 2026 Juan Carlos Munguia Salcido. Free to share unchanged with attribution.