



Lower the effort, for customers and for the agents who serve them.

Seven trainable skills that reduce customer effort, in four parts: what I hear, how I respond, and developing and maintaining self-awareness. Certified at agent and leader level with role plays and live observation. Usually sponsored by CX, operations and training leaders.

Engineering the Customer Experience. One of three standards: People, Customers and Business. The full menu is at jcmunguia.com.



2 · CUSTOMERS

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Engineering the Customer Experience

TEAM · 2 MONTHS **Certified Agents program** Agent certification

Up to 30 people · one team or channel that needs a shared way to lower effort

- Baseline from your own data: effort score, repeat contacts, transfers and critical errors
- The 7 skills, trained with role plays on your real contacts
- Internal agent certification: theory, role plays and observed live interactions
- Team leads ready to run a daily 10-minute effort huddle
- One weekly session with you

DEPARTMENT · 4 MONTHS **Agents & Leaders program** Coaching & calibration

30 to 150 people · a department, line of business or client program

- Everything in the Certified Agents program
- Leader track: the same seven skills applied to coaching their agents
- A 5-step coaching conversation and quarterly calibration
- Monitoring rules aligned with the COPC CX Standard; internal leader certification
- Fortnightly support

ENTERPRISE · 6 MONTHS **Effortless Culture program** Site-wide standard

More than 150 people · sites, regions or the whole operation, in-house or BPO

- Everything above
- A monthly "effort hunt" on repeat-contact drivers, with owners for policy, tool and knowledge fixes
- Effort and first-contact resolution built into the quality form and the dashboard
- Internal trainers and certifiers, so you certify new hires on your own
- Documented handover and close

Facilitated to 400+ customer service and sales representatives. Certification aligned with the COPC CX Standard R8.0 (2026).



Three steps.

- 1 A 30-minute call, at no cost, to understand the problem.
- 2 Proposal within 5 business days: scope, deliverables, schedule and investment.
- 3 We start with the data and the tools you already have; I don't ask for new systems.

If one is needed, it comes with a minimum of 3 to 6 months of implementation to align it, tune it and leave it under control, including my exit transition.



How we work.

Two-month renewable contract, with the package as the horizon and a maximum of twelve months per client.

Remote, with in-person sessions in Mexico City and the option of one week on site per month. Travel outside Mexico City at the client's request and expense.

Confidentiality in writing. Your operation's data doesn't leave and isn't used as an example without your permission. I work in Spanish and English.

Results guarantee. If we don't reach the goals set in your signed plan, within the plan's timeline, you get back all fees paid for the program. It applies when the conditions agreed in the plan are met: access to the data, your team's time and the actions agreed with owners. Full terms in each proposal.

Certifications are internal: they certify competence inside your organization and are not accredited third-party certifications. COPC® is a registered trademark of COPC Inc.; these programs follow practices aligned with its published CX Standard and do not grant COPC certification.

If after a year the operation still needs me, I didn't do my job.