



# Calmer people, effortless experiences, lasting results.

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Fifteen years running service operations in fintech, mobility and large-scale BPO. Three standards for service and contact-center teams, each sized to your team. I work with your team, not above it: the point is that the operation keeps working after I'm gone.

Inside: the three standards, **three sizes for each** (Team, Department, Enterprise), how to combine them, how we start, and the terms.



# Three standards, in the order I apply them.

## 1 · PEOPLE

### Engineering the Employee Experience

Develop the people who run the operation.

Usually sponsored by HR and people leaders.

Foundation program · Build program · Transform program

## 2 · CUSTOMERS

### Engineering the Customer Experience

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

Usually sponsored by CX, operations and training leaders.

Certified Agents program · Agents & Leaders program · Effortless Culture program

## 3 · BUSINESS

### Engineering the Business Experience

When the team already has the metrics, but not the results.

Usually sponsored by operations, quality and process-excellence leaders.

Yellow Belt program · Green Belt program · Black Belt program

## THREE SIZES FOR EVERY PROGRAM

### TEAM · 2 MONTHS

up to 30 people

### DEPARTMENT · 4 MONTHS

30 to 150 people

### ENTERPRISE · 6 MONTHS

more than 150 people



1 · PEOPLE

# Develop the people who run the operation.

Engineering the Employee Experience

## TEAM · 2 MONTHS **Foundation program** Values & career path

Up to 30 people · one team or role family that needs a clear standard

- Values with a five-level behavior scale, built with your leaders
- Competency matrix for up to three roles and one career ladder
- Review format and one pilot cycle
- Managers certified internally as assessors
- One weekly session with you

## DEPARTMENT · 4 MONTHS **Build program** Reviews & development

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

- Everything in the Foundation program
- Full agent and leadership matrices, with promotion criteria
- 360 feedback, calibration sessions and one full review cycle
- A development plan for every person; HR partners certified as calibrators
- Fortnightly support

## ENTERPRISE · 6 MONTHS **Transform program** Talent system

More than 150 people · sites, regions or the whole company

- Everything above
- Company-wide model tied to hiring, promotion and succession
- Competency-based interviews, mentoring, internal coaches and a talent dashboard
- Your HR team certified internally to own the model
- Documented handover and close

**Add-ons:** workshops in Emotional Intelligence, Time Management, Coaching & Feedback, Stress Management and Meditation. For organizations in Mexico, a NOM-035-STPS-2018 package (psychosocial risk at work).



2 · CUSTOMERS

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

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).



3 · BUSINESS

# When the team already has the metrics, but not the results.

Engineering the Business Experience

## TEAM · 2 MONTHS **Yellow Belt program** Diagnosis & roadmap

Up to 30 people · one contained problem: one KPI, one channel or one process

- Diagnosis using your own data, plus interviews with the team
- Process map, Pareto and root cause, applied to your KPI
- Prioritized 90-day plan with owners, and one quick win delivered
- Internal Yellow Belt certification for team leads and analysts
- One weekly session with you

## DEPARTMENT · 4 MONTHS **Green Belt program** Implementation

30 to 150 people · one or two processes, or a new channel

- Everything in the Yellow Belt program
- Quality framework aligned to COPC and ISO 9001 practices
- QA calibration, capability and control charts; a metrics dashboard with daily and weekly reviews
- Internal Green Belt certification: each participant leads a DMAIC project
- Fortnightly support through execution

## ENTERPRISE · 6 MONTHS **Black Belt program** Scale & sustain

More than 150 people · full accounts, sites or regions, shared services or BPO

- Everything above
- Strategy deployment linking yearly goals to projects and owners
- End-to-end operating model; QA with speech analytics and automation
- Your own Green Belt coaches; internal Black Belt certification
- Documented handover and close

If the system you already have has run for more than 6 months, the engagement is not extended. If a new tool or vendor is needed, the contract can extend to 12 months to cover procurement and implementation.



# Combine them.

Each program stands on its own. When you want more than one, I apply them in order: people first, then customers, then business. Agents treat customers the way they are treated, and improvement projects stick when people and service are already stable.

Combinations run in sequence or in parallel, always within **twelve months per client**.

## Team

up to 30 people

People, Customers and Business in sequence:  $2 + 2 + 2 = 6$  months.

## Department

30 to 150 people

All three in sequence:  $4 + 4 + 4 = 12$  months. Or People and Customers in parallel, then Business: **8 months**.

## Enterprise

more than 150 people

Two programs in sequence:  $6 + 6 = 12$  months. Or People and Customers in parallel for 6 months, then Business for 6.

Each program has its own goals in the signed plan. Contracts stay two-month and renewable.



# 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.



**Juan Carlos Munguia**

CONTINUOUS IMPROVEMENT CONSULTING

**TERMS**

# 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.