

OTTO ACUÑA-NARANJO

Otto is an internationally certified Management Consultant, expert in operational improvement, business improvement, growth, and strategy. Holds a CMC-Certified Consultant by ICMCI since 2017, double-certified as Black Belt in Six Sigma both by ASQ (American Society for Quality) and Lean Six Sigma Senior Advisor by Deutsche Post International Training in 2010. He is an Industrial Engineer with an MBA with emphasis in Human Resources. Highly experienced in business automation with specialty in Low Code solutions with low dependence on IT or programmers, empowering the end-clients to fix their own problems without dependencies on 3rd parties. He has experience in many industries and publishes at [Otto Acuna Archives - Nearshore Americas](#). LinkedIn: <https://www.linkedin.com/in/ottoacuna/> and email: otto.acuna@e-consultingsolutions.ee

Relevant Experience

e-Consulting Global Solutions OÜ, Estonia (<https://e-consulting.solutions>): **Founder and CEO. December 2019- to date.** This line of business arises as a B2B initiative towards the consulting and business services industry. E-CGS works with small and medium-sized consulting firms, consultant associations and business services providers, under their own brand, to expand their services portfolios by leveraging the latest technologies and methodological tools – either creating new hybrid-digital services or digitizing the delivery of traditional services-, without the cost, effort or learning curve of doing it themselves.

e-CGS has the mission of "*leveling the playing field*" for small and medium consulting services providers, providing them with the same capabilities as their large competitors, making customer differentiation a matter of flexibility, level of service, experience and quality, not their size or financial capacity. Greater competitiveness of small and medium-sized MCSPs (Management Consulting Service Providers) generates better competition, a higher quality of the consulting service offer in local markets and ultimately this benefits the local economy and the final clients, e.g. the beneficiaries of these services. Currently e-CGS has clients in Costa Rica, Switzerland, Canada and Mongolia. Soon in Jordan, Nigeria and Spain.

- Big4 Country Firm in Latin America providing 2nd Floor Consulting by orienting their field team in Strategy, Organizational Development and Process Improvement at the National Health & Pension System of Costa Rica
- Supporting a Canadian Consultancy with their LMS infrastructure and e-learning capabilities in order to support contractual responsibilities with its own contractual terms with the end-client
- Supporting a Mongolian Association of Consultants in their journey to improve e-learning capabilities.
- Supporting an International Consulting Institute in Switzerland by supporting their LMS and e-learning capabilities.
- Supporting a Latin American Consultancy with the technological tools for the provision of services.
- Supporting an African Consultancy in the process improvement area to extend their services to the last mile of service with Low-Code automation tools.
- Supporting an African based consultant's training institute to expand the services they provide to their alumni.

EXYGE – Excelencia y Gestión, Costa Rica (<https://exyge.com>) **Director and Managing Partner. May 2002 – to date.** Professional Services Company operating in Latin America, specialized in Back-Office Operations (Procurement, Finance

Operations, HR Operations) and related industries (Shared Services Centers and Financial Services Operations). EXYGE also provide managed services derived from the consulting activity (e.g. e-Learning capacity, FATCA and CRS reporting, Analytics, business processes automation, process mining, as well as strategy and business growth for SMEs, etc.). This combination of Consulting + Operational Capacity on-Demand has allowed us to develop long term relationships with clients where they have called us back for up to to 26 projects/services, in different areas over a 12 year period. Below is a comprehensive list of projects done by EXYGE, all of them lead by its Director and those in the Food industry are highlighted in color:

- NUTRICARE – Pharmaceutical, Medical Equipment and Nutrition Retailer: Internal Client – In progress
- COOPEUNA, R.L.: Financial services cooperative for the National State University. FATCA and CRS (OECDs Common Reporting Standard) for 2022.
- DESYFIN: FATCA and OECDs CRS (Common Reporting Standard) reporting for 2022.
- COOPECAJA (the Savings and Loans Employee Cooperative from the National Health System in Costa Rica): FATCA and OECDs CRS (Common Reporting Standard) reporting for 2022.
- Grupo Financiero Improsa - Investment Banking: Regulatory, legal and operational viability analysis of a company spin-off from the financial group, based on operational and regulatory constraints for intra-group relationships at financial services groups. 2022.
- Fidelitas University – Leading STEM & Engineering private institution: Development of Performance Management system to evaluate 15 leadership positions. 2022
- Grupo Financiero Improsa - Investment Banking: Update of the risk mapping of Improsa SAFI, Securities and Capital, and support in aspects of governance and regulatory policies for the three companies. 2021
- Grupo Financiero Improsa - Investment Banking: Redesign of processes, automation and virtualized collaborative management in the areas of Facilities Management (Improsa Capital), REIT Company, Improsa Brokerage and the Shared Services Center. In progress.
- FundeCooperación Foundation – Financing for sustainable initiatives: Review, redesign and automation of the expenditure cycle (from procurement to payment, projects and credit cycle payments) in its different variants. In progress.
- Grupo Financiero Improsa – Real Estate Investment Fund: Comprehensive review of the Real Estate commercial area and recommendations for short-term improvement. July 2021
- CoopeCaja, R.L. Association of savings and credits. Support services for compliance with regulatory reporting for FATCA and CRS of the OECD. 2021
- DESYFIN Financial Services. Support services for compliance with regulatory reporting for FATCA and CRS of the OECD. 2021
- CoopeUNA, R.L. Association of savings and credits. Support services for compliance with regulatory reporting for FATCA and CRS of the OECD. 2021
- Avon de Costa Rica: Customer Satisfaction Study and NPS (net promoter score) for the entire population of Beauty Consultants (> 15,000) through the leverage of IoT and analytics technology. May 2021.
- Dos Pinos – FMCG Manufacturer in the region – biggest dairy, candies and other food products in northern Latin America: Troubleshooting and redesign of the interaction and processes between the areas of the Financial Management

(Purchasing, Service Center, Corporate Treasury, Costing, etc.) and the Innovation and New Business Unit for the efficient support of the ice cream parlor business. February 2021.

- Dos Pinos – FMCG Manufacturer in the region – biggest dairy, candies and other food products in northern Latin America: World Class Benchmarking and Process Improvement in the Financial Directorate (6 finance functional areas + 1 shared services center for 3 companies in 10+ countries). Annual Programme – 2020-2021
- DESYFIN: FATCA and OECDs CRS (Common Reporting Standard) reporting for 2020. October 2020
- COOPEUNA, R.L.: Financial services cooperative for the National State University. FATCA and CRS (OECDs Common Reporting Standard) for 2020. October 2020.
- Grupo Financiero Improsa: Processes review and documentation for the 120+ buildings REIT Company of the Group, as new maintenance ERP gets into production phase. October 2020
- Financiera Desyfin: Optimization of the processes around the functioning of the Board and its Committees. Automation applied to Boards of Directors and reducing the cognitive load of information by better designing the way to work. 2020
- COOPEBANPO, R.L.: Financial services cooperative for the employees of Banco Popular in Costa Rica (4000 clients). – Integral review, redesign and documentation of key core processes, including ISO31000 risk perspective. Feb2020.
- Grupo Financiero Improsa: Accounting processes and function optimization for the 8 companies in Commercial and Investment banking. 2019.
- Grupo Financiero Improsa: Business Model Definition Document and Policies for its Real Estate Project Management service at the facilities management company. 2019.
- Center for Justice and International Law (CEJIL) – Back Office processes Digital Transformation with SaaS tools. 2019.
- Costa Rica Forever Foundation – Sustainability Funds Manager for Environmental Conservation. Design of Risk Management Policies and Procedures based on ISO 31000. 2019
- Financiera Desyfin: OECD CRS Reporting (Common Reporting Standard) “as a service” through our managed services. August 2019.
- COOPEUNA – Financial Services Cooperative: OECD CRS Reporting (Common Reporting Standard) “as a service” through our managed services. August 2019.
- Dos Pinos – FMCG Manufacturer in the region: Review, adjustment and creation of all financial and tax policies and procedures due to the entrance of new VAT Law. August 2019
- InstaMasa – Corn products Manufacturer. Review and Re-design of Finance and Administration (Order to Cash, Purchase to Payment and Record to Report processes, organizational structure, digital transformation and other opportunities). August 2019
- Nutricare – Nutritional and Pharmaceutical distributor: Organizational Culture Analysis through the use of the *Competing Values Framework* and the *OCAI standardized instrument*. 2019
- Financiera Desyfin: Cost Reduction Programme for the Credit Structuring and Underwriting area of a financial services company. July 2018
- Financiera Desyfin: OECD CRS Reporting (Common Reporting Standard) “as a service” through our managed services. August 2018.

- Center for Justice and International Law (CEJIL) – Transformation towards a “Project Driven Organization”. 2018.
- Grupo Financiero Improsa – Investment Banking Area – 4 companies: Policies, Procedures and Processes Management “as a Service”. In progress under an annual contract since 2014.
- Feilo Sylvania Américas: Lumiance University Implementation– E-learning platform and capabilities “as a Service” for Feilo Sylvania México, including instructional design, day to day helpdesk, etc. In progress under an annual contract since 2016.
- Feilo Sylvania Américas: Corporate Intranet and CRM “as a Service” for the CAMEX Region (México, Central America and Spanish Caribbean). In progress under an annual contract since 2017.
- Grupo Financiero Improsa : Design, Implementation and Performance Management role “as a service” of the Group’s Shared Services Center. In Progress – Multi-Annual Project and Services.
- VIVICON Construction and Real Estate: Competitive Strategic Planning. 2017.
- CONOBRA / CLEANCO Clean Room Specialized Design and Construction: Competitive Strategic Planning. 2017.
- Grupo Financiero Improsa: Corporate Procurement and PTP (purchase to payment) process redesign and automation. 2017
- Stein Corp – pharma manufacturer and distributor: Optimization of the procurement organization and its processes through an Organisational Design solution. 2017
- Improsa Valores (brokerage) – Structuring of the new advisory processes aligned to the new SUGEVAL regulatory rules. 2017.
- Stein Corp – pharma manufacturer and distributor:: Change Management and Methodological Support for the Implementation of Project MERC0 (project derived from our recommendations in a previous engagement). 2017
- Grupo Financiero Improsa – Investment Banking Area – 4 companies: Critical operational risk mapping in all processes at all 4 companies from the investment banking area. 2017.
- Soporte Logístico (Freight Company): Internal Capacity Building Programme (PCCI) with focus on company professionalization. 2017.
- BAC Credomatic (biggest regional bank in Central America). Advisory and coaching to the implementation team for the Central Operations Organization, which will concentrate several processes for the region. 2016.
- Stein Corp (Pharmaceutical Lab and Representative). Procurement, Income (OTC) and Spending (PTP) cycles process optimization through the CARICAM region. 2016.
- Garnier & Garnier (Real Estate Developers): Design of an Analytics model (Tableau) for financial analysis of real estate projects and transfer of know-how and training of financial analysis team. 2016.
- AVON Costa Rica: Support to the Business Intelligence department in the accelerated creation of reports and dashboards in all areas, using Tableau. 2016.
- Financiera Desyfin (CR Financial Institution): Integral review of the Prospecting and Sales Process. Sep 2015 – Feb 2016
- Grupo Financiero Improsa (CR) – Investment Banking Area: Organizational Design engagement and shared services creation for the companies related to investment banking (Stock Trading Co, REIT Company and Real Estate development and administration Co). 2015-2016

- Grupo Financiero Improsa (CR) – Stock Trading and Premier Banking Co: Review and Redesign of all policies and procedures and job descriptions. 2016.
- Garnier & Garnier (Real Estate Developers): Review and procedure development for the process of Real Estate Development Financial Analysis. Dec 2015 – Jan 2016.
- AVON Costa Rica: Analysis and Optimization of the Field Sales Cycle. Dec 2015 - Jan 2016.
- Feilo-Sylvania (formerly Havells-Sylvania Lightning Co): Design and implementation of a regional LATAM Helpdesk for sales and client support. 2015/2016 – currently stabilizing CR and initializing Brazil.
- Financiera Desyfin (CR Financial Institution): Multi-Annual Analytics Dashboard with key indicators for the 2016 Strategic Planning Session. Oct-Nov 2015.
- Avon Costa Rica: Focus Group for the identification of key issues for the Field Zone Managers. 2015
- Financiera Desyfin (CR Financial Institution): Development of a Regional Branches KPI Dashboard. 2015. Placed into production under contract as a recurrent service under RaaS (Reporting & Analytics as a Service) with annual contract since 2015.
- Avon Costa Rica: Support and Controllership Program to EsIAVONes – the strategic projects portfolio of Avon CR. In progress under recurrent contract since January 2015.
- Feilo-Sylvania (formerly Havells-Sylvania Lightning Co): Implementation of EXYGE-LEARNING platform but under Sylvania’s branding (www.sylvania-school.com). In progress under annual contract since 2015.
- Feilo-Sylvania (formerly Havells-Sylvania Lightning Co): PCCI – Programme for the Creation of Internal Capacity for Project & Process Management as well as Business Excellence in general. Under annual contract since 2014.
- Financiera Desyfin (CR Financial Institution): Work load analysis at selected branches.2015
- Grupo Financiero Improsa – Commercial Banking Division - Leasing Co: Redesign of Business Processes and elaboration of a RFQ (Requirements for Quote) for a System for all processes in Costa Rica. 2015.
- Grupo Financiero Improsa – Investment Banking Division - REIT Co: Review and Update of all policies and procedures and Job Description Manual. 2014/2015
- Grupo Financiero Improsa – Commercial Banking Division – Accounting Areas: Review of all accounting processes at the Commercial Banking subsidiaries and its optimization. 2014/2015
- Grupo Financiero Improsa – Commercial Banking – Trust Management Area: Design of a RFQ (Requirements for Quote) for a System for all processes in Costa Rica. 2014
- Center for Justice and International Law – CEJIL (International NGO for Human Rights): Creation of an RFQ for a system to control core activity of the organization and support through sourcing and evaluating providers at different times. 2013/2014/2015
- Grupo Financiero Improsa – Commercial Banking – Trust Management Area: Review and Redesign of processes with aim to achieve operational efficiency, better controls and application of best practices. 2014.
- Banco Popular (CR State Bank): Implementation of an Organizational structure aligned with COBIT. Support to PricewaterhouseCoopers Costa Rica on specific areas of the engagement, due to our credentials and experience on some specific topics. 2014

- Grupo Financiero Improsa – Investment Banking Division – Real Estate Development and Management Co: Design of a process and procedure for the management of contingencies. 2014.
- Financiera Desyfin (CR Financial Institution): Implementation of an E-Learning platform and design of compliance courses and certification procedure for the Compliance Officer's Office. 2014. EXYGE-LEARNING platform service under annual contract since 2014.
- ColorVision, S.A. (Road and Bus Billboards): Performance Management by Outsourcing Service – Migration of Dashboards and Reporting to Tableau Software 2014.
- Quality Motors (Costa Rica exclusive car dealer for Kia/Mazda): Creation of a Job Description Manual and design/implementation of points and factors job valuation scale for salary administration. 2014.
- Financiera Desyfin (CR Financial Institution): Design of the Business Dashboard for Monthly review by the Management Board. Placed into production under contract as a recurrent service under RaaS (Reporting & Analytics as a Service) with annual contract since 2014.
- FISERV (Financial analysis and outsourcing): Design of a Pre-Business Case and Work plan for the analysis of increasing finance and accounting operations at the Shared Services Center in Costa Rica. 2014
- Ministry of Work and Social Security of Costa Rica: Design and Implementation of an Analytics Dashboard for the Work Relations Operations in Costa Rica. Placed into production with monthly recalculation under RaaS (Reporting & Analytics as a Service) free of charge as a Corporate Responsibility Initiative since 2013.
- Grupo Financiero Improsa – Investment Banking Division – Real Estate Development and Management Co: Review and redesign of all real estate management processes and procedures. 2013.
- Inter-American Institute for Cooperation on Agriculture (NGO part of the UN System): Review and Redesign of the HR Function for the Americas (OD/Processes /RFQ for System/Implementation of IT enablers/Analytics/etc.). 2013
- AVON Costa Rica: Support to the Mercurio Process Improvement Project. 2012
- Center for Justice and International Law – CEJIL (International NGO for Human Rights): Review of Organization and Workload Analysis from 2008 due to new changing conditions in the region – Mesoamerica Office at San Jose. 2012
- Financiera Desyfin (CR Financial Institution): Design of all reporting outputs related to Credit, Collections and special reports for Management Board and the Regulatory Entity in Tableau from the SAP for banking system raw data. Placed into production under contract as a recurrent service under RaaS (Reporting & Analytics as a Service) with annual contract since 2012.
- International Organization of Labor (ILO): Identification of Structural Opportunities for Improvement in the rural offices for Work Inspection at the Ministry of Work and Social Security of Costa Rica as ILO's cooperation with CR's Government in order to help them comply with the "White Book" International Treaty. 2012
- International Organization of Labor (ILO): Complete Review and Process Improvement for the Workers Relations Area at the Ministry of Work and Social Security of Costa Rica as ILO's cooperation with CR's Government in order to help them comply with the "White Book" International Treaty. 2012
- GlaxoSmithKline – pharma manufacturer and distributor: Training Matrix Consolidation for the CARICAM Region. 2012

- Associated Colleges of the Midwest (ACM): Coaching sessions on management skills for new Directors. 2012.
- GlaxoSmithKline – pharma manufacturer and distributor:: Commercial Regional Job Descriptions design for the CARICAM Region. 2012
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Cost Reduction Opportunities Identification post-SAP implementation. 2012
- Florida Bebidas (Main FMCG Group of Companies in Costa Rica): Support and advisory at their SSC planning session. 2011
- Financiera Desyfin (CR Financial Institution): Outsourcing of Treasury Operations with our Bank Statements Processing Service (provision of all new incoming bank account transactions out of 17 different bank statement formats and conversion into an unified format with old transactions filtered – ready for loading into SAP, making possible to implement automatic reconciliation in SAP in an easier manner). Put into production as an annual contract since 2011
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Business Case, Design and Roadmap for a Financial Shared Services Center for all operations. Initial support for Phase 1 – Panama. 2011
- Financiera Desyfin (CR Financial Institution): Project Management Outsourcing for the implementation of the recommendations from previous process redesign and optimization engagement. Responsible for the implementation and stabilization of new processes, handling new system providers, training internal personnel, etc. 2011
- Deutsche Post DHL Global Business Services: Integral review, troubleshooting and redesign of processes in the Purchase to Payment (PtP) Scanning and Archiving department at the Global Shared Services Center in Costa Rica. 2011.
- Financiera Desyfin (CR Financial Institution): Review, Optimization and Procedures for main Business Processes (Credit, Factoring, Investment from the Public, Treasury and Finance). 2011.
- Associated Colleges of the Midwest (ACM): Organizational and Personnel Review for the Costa Rica local operation. 2011.
- Fast Moving Consumer Goods Multinational: Benchmarking of processes, practices and policies for the grant of credit to different channels (supermarket chains, mini-markets, hotels, restaurants or manufacturing companies) in order to have a picture of the Costa Rican Market. 2011
- Center for Justice and International Law – CEJIL (International NGO for Human Rights): Integral Revision of Financial Practices and Processes for the Americas and making of a Regional Finance Manual for the whole Organization. 2010/2011.
- GlaxoSmithKline: Design and support of Central America & the Caribbean (CARICAM) HR processes migration to Costa Rica under a Shared Services Model. – 2010/2011
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Alignment of Operational Objective and Goals with high level company Balanced Scorecard for 25 Management positions at the Finance Directorate in Costa Rica (HQ location). – 2010/2011
- Center for Justice and International Law – CEJIL (International NGO for Human Rights): Design of the HR function for the Americas (Washington DC, San José, Sao Paulo and Buenos Aires) and support during its implementation. May-Dec 2009.

- Center for Justice and International Law – CEJIL (International NGO for Human Rights): Organizational and Workload Analysis and Redesign for Mesoamerica’s Office at San José. Set-Dec 2008.
- Inter-American Institute of Human Rights –IIDH (part of the Interamerican System of Human Rights): Design of an Activity Based Costing System for the Back-Office Operations. May 2007 to Jan 2008.

Deutsche Post DHL Global Business Services: Performance, Reporting & Site Finance & Controlling Manager - Finance & Human Resources Operations Americas / First Choice (Lean-Six Sigma DPDHL Methodology) Senior Advisor for the GBS Americas Organization. 2007 – 2010

In over 3 years, as Performance & Controlling Manager I was in charge of all corporate and accounting reporting to HQ in Germany (70+ entities), as well as the financial and controlling matters for the GBS organization in Central America. I had P&L responsibility for over 7 MM Euros in 140 cost centers in 7 countries. I was in charge of the service relationship to the business (SLAs) and during times of transition between Heads of the SSC I had the opportunity to lead the stabilization and administration of several accounting and financial areas.

I was also responsible for defining and controlling the operational and P&L results of the processes and services we provided to 5 different business units.

Because of my past experience in SSC design and consulting projects, I was commissioned with additional responsibilities related to transformational projects related to Finance Operations in the region:

- Design of an activity based costing model for all processes and services at the SSC: PTP, OTC and RTR (Purchase to Payment, Order to Cash and Record to Report cycles respectively). The model was exported to Headquarters to standardize the model for everyone in the company.
- Migration of the last remaining processes in PTP, OTC and RTR in Central America to the SSC in San José under a Lean Management scheme. This was Migration 2.0 of a previous initial project I did when at PwC. In this run, I did not only made the review, design and plan for the migration, but also led the implementation and stabilization phase.
- Building of a Business Intelligence solution that would provide KPIs with drill down capabilities to the transactional level.
- Development of a Reporting Unit common to all business units served (different systems, platforms and reports) that would reap the benefits of operational efficiency. In the 3 years I led the Unit we doubled the number of reported entities and increased only 33% in size and costs.
- Analysis and Migration of the financial processes in the Caribbean (14 island locations in 4 languages). I lead the project until just before the migration, due to my transition to create and develop EXYGE.

Additionally, I was certified as “Senior Advisor” by the Deutsche Post International Training Organization on “First Choice”, the Lean Six-Sigma methodology at DPDHL. As a previous step I obtained the CSSBB (Certified Six Sigma Black Belt) certification from the American Society for Quality (ASQ).

PricewaterhouseCoopers InterAmericas. Manager – Process and Performance Improvement Advisory Services. Oct. 2000 – Apr. 2007. As leader for the process

improvement practice in Central America I had the responsibility for the development, sales and execution of projects in my line of business. As part of my role I led and/or participated in the following engagements:

- BNCR – Banco Nacional de Costa Rica (Biggest Financial Institution in Central America): Design of an Organizational Design methodology for internal usage by the Strategies and Projects Department. 2007
- INS – Insurance National Institute: Design of an Activity Based Costing Model to do costing and profit analysis at product level. 2007
- Purdy Motor – Car Dealership Group for Toyota and Daihatsu in Costa Rica and Mexico: Organizational design of the Regional Operations. 2007
- Public Defense Office in Costa Rica: Institutional Strengthening through the revision and redesign of Organizational and administrative processes. 2007
- Inter-American Institute of Human Rights –IIDH (part of the InterAmericas System of Human Rights): Training in Activity Based Costing and processes review. 2006
- Euro Autos – Regional Car Dealership Group for BMW, Porsche, Ssang Yong and Land Rover in several Central American countries: High Level Organizational Design for the Region. 2006
- DHL Logistics & Express Central America: Review of Shared Services Center processes and design of an Activity Based Costing model for the re-designed processes. 2006
- COOPESA, R.L. – Repairing and reconditioning company for Boeing, MD's y DC-10's: Implementation of "Five S's" philosophy in their maintenance operations. Project was supported by PwC Vancouver due to industry expertise. 2006
- Grupo Durman Esquivel (today Aliaxis – Belgian global manufacturer and distributor of plastic fluid handling systems used in residential and commercial construction): Revision of their Shared Services processes and organization previous to the implementation of SAP. 2006
- Interfin-Banex Pensiones (Biggest private pension funds manager in Costa Rica at the time): Revision and re-design of the client support model under a philosophy of Customer Centricity, leading to the redesign of the processes and organization of the Contact Center. – 2006.
- UCIMED – Main private University for Medical Studies in Costa Rica: Organizational design, process improvement and procedure development for the administrative and financial areas. 2006
- Humboldt Schule – German High School in Costa Rica. Re-engineering of the administrative area. 2005.
- BNCR – Banco Nacional de Costa Rica (Biggest Financial Institution in Central America): Strategic Planning course for the central team for the bank transformation project. 2005
- DOLE Fresh Fruit – Maya Division in Honduras: Strategic Planning Session facilitation. 2005
- DOLE Fresh Fruit International: Strategic planning session for the finance organization for Latin America 2005
- DOLE Fresh Fruit – Costa Rica Division: Strategic Planning Session facilitation. 2005
- DOLE Fresh Fruit – Ecuador, Colombia and Peru Division: Strategic Planning Session facilitation. 2005
- Grupo Roble Costa Rica – Biggest Shopping Center and Office Center developers in Central America: Alignment of organization, processes, systems and culture to the CRM vision and strategy. 2004

- DOLE Fresh Fruit International: Strategic Planning Session facilitation for the IT Organization in Latin America. 2004
- DOLE Ocean Cargo Express – Strategic Planning Session facilitation. 2004
- DOLE Fresh Fruit International: Strategic Planning Session facilitation for the Logistics & Transportation Organization in Latin America. 2004
- BNCR – Banco Nacional de Costa Rica (Biggest Financial Institution in Central America): Revision and organizational re-design of the e-commerce/e-banking unit at the Technology and Operations Department. 2004
- Lachner & Saenz - Car Dealership in Costa Rica for Isuzu, Chevrolet & Hyundai: Design and implementation of a Sales and Support Contact Center. 2004
- Grupo Durman Esquivel (today Aliaxis – Belgian global manufacturer and distributor of plastic fluid handling systems used in residential and commercial construction): Design and Implementation of the Shared Services Center operations for Latin America (Mex to Peru). Included HR, payroll, AP, Accounting and part of the procurement operations. 2003/2004
- Corporación Cormar / DHL – Organizational integration of both companies in Central America as Deutsche Post bought both and hired PwC to design the integration. 2003/2004
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Process improvement and procedures development for the finance & treasury area – 2003/2004
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Procurement, Income (OTC) and Spending (PTP) cycles process optimization in all their companies and operations. Analysis and Re-design in 2002/2003 / Implementation support during 2004/2005.
- The Global Fund for the eradication of AIDS, tuberculosis and malaria: Evaluation, Negotiation and Monitoring of the Ministry of Health of Costa Rica. I evaluated the IT and purchasing capabilities of the Ministry. 2003/2004
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Facilitation of a strategy work session for the development of an Special Economic Zone for the North of Costa Rica. 2003
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Redesign of the Treasury's Cashier and Route Backoffice. 2003
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Finance Services process optimization and procedure development. 2003
- Corporación Cormar (Logistics and Transportation Co from Mexico to Colombia, acquired by Deutsche Post and merged with DHL): Business Case, Analysis and Blueprint for a Shared Services Organization for finance, HR and Procurement. 2003
- INTACO International – Design of a Performance and Variable Compensation model for ESCO Costa Rica and INTACO International – 2002/2003.
- General Controllershship's Office for the Republic of Costa Rica. Re-Design of Human Resources to comply with a Management by Competencies model. 2001/2002
- Dos Pinos, R.L. (Biggest Dairy and Fresh Products FMCG Company in Central America and the Caribbean): Credit and Collections process improvement and procedures development. 2001/2002
- City of Knowledge (Panama's Innovation Compound at the old Clayton US Military base at the Canal): Institutional Strengthening Project at its foundation – 2001

- RECOPE - Costa Rica's Oil and Refinery State Institution. – Seminar to High and Middle Management on E-Business and its impact on the petrochemical industry. 2001
- British American Tobacco Central America
 - Information Technology Benchmarking Study. 2001
 - Advisory and Support on the elaboration of a marketing strategic analysis for the region for the next 10 years. 2001
- Purdy Motor – Car Dealership for Toyota and Daihatsu in Costa Rica: Design of a Performance and Variable Compensation model. 2001

Independent Consultant on a personal basis. Jun. – Oct. 2000.

Trying to initiate a company and testing market possibilities. Ended the initiative when re-called by PwC.

Banco Improsa, S.A. – Small boutique bank at the time, focused on SMBs. Administration and Human Resources Manager. Jun 1999 – Jun. 2000

Reporting to the GM, I was in charge of human resources, electronic banking, process redesign, processes and policy documentation, Quality audits, administrative areas and security. During my stay in Improsa, I designed and implemented the bank's intranet, re-designed all policies and procedures, did several organizational design engagement on business areas and helped with other projects in IT and strategic planning. After a year, the bank entered a crisis that led it to close my área and I was also in charge of re-arranging all processes in other departments before leaving.

Chiquita Brands International. Internal Consultant in Systems, Processes and Costing. International Human Resources Organization for Latin America. Apr. 1997 – May. 1999

Reporting to the Regional Director of HR and Organizational Design, I was in charge of several initiatives for the Guatemala, Honduras, Costa Rica, Panama and Colombia Divisions. The main projects in which I led and/or was involved were:

- Regional HR Policies and Procedures for all organizations and divisions in the Tropics.
- Activity Based Costing implementation at Company Hospital in La Lima Honduras.
- HR Information system for the region: I was in charge of the RFQ (Request for Quotation) and some aspects of the implementation Project.
- Support to other areas: I provided day to day HR services to the procurement organization and the Great White Fleet vessels Company.

Corporación BFA. Banco BFA. (absorbed by a succession of financial groups until what is today Scotiabank's acquisition of Citi in Costa Rica) Assistant to the General Manager & In-Charge of Methods, Procedures and Quality. Aug.1995 – Mar.1997.

Reporting to the GM, I was in charge of several special projects within the Financial Services group of companies. (Banco BFA, Commercial International Bank & Trust,

InterCard VISA, BFA Stock Trading, BFA Leasing and Pro-Vida Pension Funds). Among the main projects I was involved were:

- Performance & Quality Control System: Designed and implemented a system that controlled the health of the operation.
- Activity Based Costing: Along with KPMG we implemented an ABM/Profitability model for all companies of the Group.
- Process Redesign:
 - *Backoffice* Design for Banco BFA (Current accounts Operations)
 - Current accounts, deposits from public for Offshore Bank.
 - Training of key personnel in Process re-design and documentation.
 - Design of procedure manuals for branch operations, Offline Operation, Taxes Collection, Letters of Credit and other.
- Designed and implemented the Group's web site (the internet was a "new thing" at the time).
- Designed and developed the electronic banking manual, first in the country at the time.
- Designed and implemented the safe deposit box service at the bank subsidiary.

Price Waterhouse Interamérica. *Senior Consultant.* Feb 1993 to Jul 1995.

As part of the Management *Consulting Services* Department I participated in many projects such as:

- Performing as Executive Headhunting for several clients, especially technical positions.
- Created the first Executive Headhunting procedure manual.
- Collaborated as part of the team in (SEIS) a Compensation and Benefits Benchmarking Survey service that was the main "project" in terms of annual revenue.
- Special compensation studies in the financial services sector.
- Job classification and valuation systems for agri-business, industrial clients and services sector.
- Launch of the re-engineering line of service in Costa Rica (back in the times of Michael Hammer and James Champy's Re-engineering Manifesto)
- Process redesign in FMCG companies as well as in the Health Sector.
- Participation in the design and implementation of an HR system for RECOPE, the Oil and Refinery state company.

Universidad de Costa Rica. Several part time jobs as Student: Teacher's Assistant to the course of Time & Methods. Audiovisual Department Assistant at the University's Library. 1987 to 1992 while studying.

Formal Preparation

- MBA with major in Human Resources. Universidad Latina de Costa Rica (Laureate Network of Universities). 1998.
- Licentiate in Industrial Engineering - 5 Yr. Degree Program (Bachelor of Engineering + 1 more year of specialization) Top 10% of Class. Universidad de Costa Rica, 1993.
- Costa Rican High School. Colegio Calasanz, San José, C.R. Dec 1986.

- US High School. Ridgewood High School, New Jersey, USA. English Prize: Class of 1986. Aug. 1986 (after 1 year as exchange student with AFS – American Field Service)
- Fluent English, very basic Portuguese. Native Spanish.
- Self-taught Computer Science (Servers, Networks, Telematics, Linux, data recovery techniques, etc.).

Courses and Seminars

- Kissflow LowCode Digital Process Automation: November 2021.
- Argos Labs Low-Code RPA / AI: Training for Partners. In progress
- Python Language for RPA and Analytics: Self-paced Training - In progress
- Apromore Process Mining: Bootcamp for Partners. Certified as Process Mining Analyst - March 2021.
- Training for Quality Assurance Main Assessors for performing audits on Institutes of Consulting belonging to ICMCI.
- ISO 20700: Official trainer for Spanish language of the CMC-Global Institute. October 2020.
- Kissflow Digital Workplace: Bootcamp for Partners. 2020 (Low-Code BPM)
- ISO 20700: ICMCI certification for the ISO standard for the provision of business management consulting services. CMC-Global Institute, virtual and international arm of the Institute of Management Consulting Institutes (<https://cmc-global.org>). 2019. Listed at <https://www.iso20700.org/content/list-trained-consultants> under CMC-GI
- Institute of Economic Sciences in Costa Rica: Implementation and implications of the new Labor Procedural Law in Costa Rica. 2018
- International Council of Management Consulting Institutes. CMC-Global Institute: Certified Management Consultant – CMC. 2017.
- Darden School of Business – University of Virginia: Grow to Greatness: Smart Growth for Private Businesses. Coursera Certified Business Courses. 2016.
- Deutsche Post International Training/Certification: Lean Six Sigma Senior Advisor for Global Business Services 2010.
- American Society for Quality Six Sigma Black Belt Certification. 2010. Certified as CSSBB by ASQ.
- *Web Enabled Oracle Financials version 11i and Oracle e-procurement Bootcamp* – Oracle Costa Rica. 2001
- Self-Learning by PricewaterhouseCoopers e-learning:
 - *E-business: Business in the new millennium* – 2000
 - *Emm@ - E-business maturity model assessment* – 2000
 - *E-Commerce: An Introduction* – 2000
 - *E-Commerce: Infrastructure Framework* – 2001
- *1998 Fall Conference on HR Information Systems*. International Human Resources Information Management Association. Vancouver, Canada. 1998.
- *Behavioral Interviewing*. Behavioral Technologies. 1998.
- *The 7 Habits of Highly Effective People*. Covey Leadership Institute. 1998.
- *Effective OD Consulting*. Internal Chiquita Brands Course. 1998.
- *International Compensation*. Internal Chiquita Brands Course. 1997.
- *Quality and Performance in Financial Services*. Centrica Financial Holdings. Guatemala, 1996.
- *Oracle Financials and Human Resources System*. Oracle Costa Rica, 1994.
- *Change Integration and Business Process Transformation Methodology*. Price Waterhouse, 1994.

- *How to prepare a strategic business plan*. The Center for Inter Cultural Training and Education. 1993.

Publications

- Process Improvement and Digital Transformation commentator at NearShoreAmericas.com : <https://nearshoreamericas.com/author/otto-acuna/>
- LinkedIn publications about consulting, management and business topics – In Spanish: https://bit.ly/LKD_OAN_PUBS
- "Sustainable Savings: The Difference between 'spending less' and 'costing less'". EXYGE.COM blog. September 2013
- "Management by KPIs....by Outsourcing: An effective and impartial alternative". EXYGE.COM blog. July 2012
- "Operational Improvement in Services Processes? Basic Elements for Success". EXYGE.COM blog. April 2012
- "KPIs....Why are they so hard to use?" EXYGE.COM blog. March 2012
- "Operational Efficiency in Healthcare Services – The New Frontier". EXYGE.COM blog. March 2012
- "@February 2012: How many of you have already defined their year's objectives and goals?" EXYGE.COM blog. February 2012
- "The Strategy in Cost Reduction lies in making it sustainable, not in performing it". EXYGE.COM blog. February 2012
- "'Process the Client' versus 'Improve the usage or service experience'". EXYGE.COM blog. February 2012
- "ABC Costing in Shared Services Environments" – Mexican Public Accountants Institute Magazine. Mexican Institute of Certified Public Accountants. July 2006.
- "Culture for Improvement" –PricewaterhouseCoopers Column. La República Business Newspaper. - September 2002
- "*Customer Relationship Management and its importance under NAFTA*" PricewaterhouseCoopers Column. La República Business Newspaper. - March 2002
- "*Cost Reduction: Dangerous Temptation*" – PricewaterhouseCoopers Column. La República Business Newspaper - October 2001
- "*E-CRM: the attention and caring of clients in the era of e-business*". *Manager's Magazine. Special CRM edition* – July 2001.
- "*E-Commerce is just the tip of the Iceberg*" World Connection Magazine. Costa Rica Foreign Commerce Trading Agency – March 2001.
- "*Outsourcing Opportunities*". El Financiero Business Newspaper. October 2000
- "*Activity Based Costing (ABC) and its utilization in decision making*". *Engineering Magazine*. CIEMI - CFIA. Year 9 Vol 35. 1999
- "*Flexible work arrangements through teleworking at the Chiquita Brands International Regional Headquarters*". MBA Programme Graduation Thesis. Universidad Latina de Costa Rica. Dec. 1998.
- "*Design of an Inventory Planning and Control System for the Technical Spare parts for the Airbus A320 aircrafts at LACSA, the Costa Rican National Airline*". Graduation Thesis for the Licentiate Programme in Industrial Engineering. U.C.R. Feb. 1993

Other Activities

- **CMC-Global Institute**. International Chapter for the *International Council of Management Consulting Institutes ICMCI*

- Member since July 2016 and only Certified CMC professional in the Latin American region.
- Certification Committee Member from July 2017 to April 2018.
- Professional Development Chair at CMC-GI. Since Jan 2018.
- **Chair of the Board.** Since November 2021
- **International Council of Management Consulting Institutes ICMCI.**
 - Onwards 2020 Task Force: June - December 2020
 - *Membership Committee Task Force* - March - August 2019
 - *Quality Assurance Committee member* – Auditing Management Consulting Institutes every 3 years. Auditing of Institutes of Turkey as Main Assessor and Iran, Switzerland and Serbia as Co-Assessor supporting the Main Assessor.
- *London Institute of Banking and Finance – LIBF (previously The Chartered Institute of Bankers)* UK. Since 2017-2019
- Corporate member of ANREH – Panama Association for Human Resources Professionals. 2014-2018.
- Rotary International - *San José Noreste Club. District 4240.* 1992-2002 y 2014 to 2019. Director of Professional Service Committee.
- Member of ASQ – American Society for Quality. From 2010 to 2012
- Member of *Colegio Federado de Ingenieros y Arquitectos (CFIA-CIEMI)*; the Institutional body that regulates the Engineering and Architecture professions in Costa Rica. Since 1995.
- Member of *Colegio de Profesionales en Ciencias Económicas*; the Institutional body that regulates the Administration and Economics professions in Costa Rica. Since 2004.
- *Member of the International Human Resources Information Management Association, Canada.* 1998-1999
- Member of *the Chartered Institute of Bankers*; London, UK. From 1996 to 1998
- Member of *Institute of Industrial Engineers*; Atlanta, USA. From 1995 to 2003
- Exchange Student with American Field Service (AFS) in the USA. Jul 1985 – Jul 1986

Teaching

- *Business Process Improvement* – PricewaterhouseCoopers – June 2003
- *B2E – Business to Employee: The transformation of Human Resources Management through E-business.* Central America E-Business Congress. El Salvador, September 2001
- *Design and Implementation of E-Business Strategies.* Central America E-Business Congress. El Salvador, September 2001
- *Effective Headhunting when Recruiting.* Organized by Deloitte & Touché. June 1999
- *Work and the Design of Activities. 8th course of the Organizational Psychology Masters Programme.* Universidad Latina de Costa Rica. 1999
- *The ABC of Activity Based Costing.* Seminar to MBA students at National University – 1999