

# e-Consulting Global Solutions

September 2024  
For Consultancy and Business  
Services Providers

**We support SMB Consultancies,  
Consulting Associations and Business  
Services Providers with innovative  
capabilities to serve their clients better  
and excel in their home market.**

*Methodologies - Industry Expertise - Tech Capabilities*

*We Level The Playing Field to Help Compete Better*

# Why an Estonian Company?

*Estonia's unique global digital ecosystem is unique and enabled e-CGS to "born digital" since its creation. We use resources and digital platforms from anywhere in the world to transfer your consultancy the «know-how» and the execution capacity in an autonomous way.*

*We work under your own brand, supporting the digitization and expansion of your services with the latest technologies and methodological tools.*

[https://bit.ly/ecgs\\_ConnectAmericas](https://bit.ly/ecgs_ConnectAmericas)

*"Estonia: The World's Most Digital Country"*  
**Forbes**

We are a VERIFIED and ACCREDITED COMPANY by



ESTONIAN  
CHAMBER OF COMMERCE  
AND INDUSTRY



connect  
americas



AN INITIATIVE CREATED BY



Inter-American  
Development Bank



**e-Consulting**  
Global Solutions



**e-CGS** is your “one-stop-shop” for leveraging your practice and services portfolio with technological effective tools and innovative methods that “*level the playing field*” so that you can compete better:

These are some of the capabilities that can be sourced with an alliance and provide a ‘fast-track’ route to innovation :

**Operations & Processes Consulting**

- Workflows & BPM capabilities coupled with document management and electronic signatures.
- Process Mining (automated process discovery, reporting and simulation)
- CRM for commercial Operations
- Robotics Process Automation (RPA)
- Best Practice database (APQC.ORG)
- Reporting and Analytics (dashboards and special studies)
- Automated document management (DMS) integrated with BPM workflows and signing capabilities.
- Expansion the current capabilities of your ERP (SAP, Oracle, Local) automating the remaining «end to end» process for complete control and efficiency.

**People and Change**

- Automation of HR Operations
- AI-powered change management
- Collaborative environments for full immersion and management of teams and projects.
- «Competing Values Framework» culture model and automated OCAI tool.
- HR Analytics (descriptive and predictive)
- e-Learning infrastructure and capability development to raise your training delivery service.
- Organizational Development methodologies with SaaS tools that support with automation your diagnostic and design phases

**Add specialized experience for new clients with special industry needs :**

- Procurement
- Logistics
- Commercial Operations
- Accounting, Treasury, Payment Cycle and Revenue Cycle.
- FATCA / CRS Reporting for Financial Institutions
- Operational Risk
- Banking Operations

**Using 2nd Floor Consulting**  
(Consultant to your consultants in specialized topics, inside or outside a specific project)

- BackOffice Operations
- Banking and Finance Ops
- Shared Services Centers
- Risk & Compliance
- Sustainability and Circular Economy
- ISO standards (20700, 9001,14001, 28000, 50001, 18788), BASC and C-Neutrality

# Some of our Clients

WE NEVER SUPPLY DIRECTLY TO END-CLIENTS, ONLY TO THE CONSULTANCIES WE WORK WITH



The international chapter of ICMCI - the **INTERNATIONAL COUNCIL OF MANAGEMENT CONSULTING INSTITUTES** operating globally from Switzerland

- e-Learning infrastructure
- Developing of e-Courses (ISO20700, Management Consulting Ethics) and other digital assets
- Automation capabilities for their members (starting in 2024)
- e-payment gateway capacity for collection processes worldwide



Greek firm helping **Family Businesses** in GCC region with emphasis in **Operational Excellence**

- Process automation
- Family Business Groups optimization through implementation of Shared Services



Canadian firm helping organizations improve effectiveness and accountability **Trainer of ISO 20700** for the Consulting Institutes of Canada, USA, Hong Kong, Caribbean and ICMCI, the world MC Institutes federation.

- e-Learning infrastructure
- Management of e-learning service.



**Winner 2021 of the Constantinus International Award - the "Oscars" of the Consulting Industry**

- e-Learning infrastructure
- e-payment for courses and signup
- e-Course development *know-how* transferred to trainers
- Course content post-production.



Egyptian firm helping **organizations and entrepreneurs**

- Financial processes automation
- Support to entry in some vertical industry markets.



Niche SMB Firm highly specialized in Strategy and Operations. Covering Latin America, Spain and MENA Region

- Regulatory e-learning (internal regulatory compliance courses)
- Process automation using several tools for BPM, CRM, HRIS, Procurement Tech.
- Process mining for process improvement in shared services and financial services. Creation of «digital twins» and use cases in risk and compliance.
- Multiple projects about shared services centers (full scope), specially within large local groups.



Big 4 local country office  
*Specific firm/country not disclosed*

- 2<sup>nd</sup> Floor consulting, supporting the client firm's local team with specific expertise in:
- Shared Services Centers
- Organizational Design
- Lean Six Sigma in corporate backoffice environments.

NOTE: in 2<sup>nd</sup> floor consulting engagements our resources provide experience and coaching in specific subject matters to the field team, but the contractual responsibility and the brand put forward is our clients' - the allied local consulting firm.



# Ecosystem of proven and innovative tools and methods

## TECH-BASED CAPACITIES

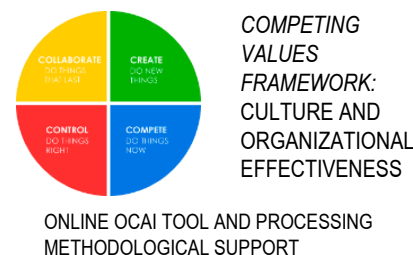


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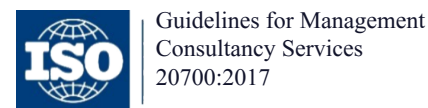
VIDEO INTERVIEWS AND RECRUITMENT  
AUTOMATION



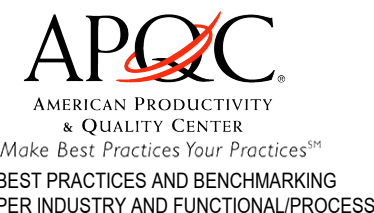
## TOOLS &amp; METHODS CAPACITIES



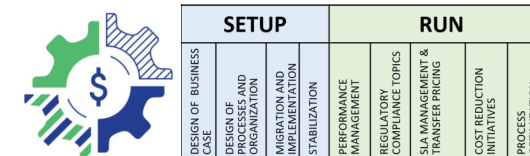
## Consultant's Training



IN COOPERATION WITH THE  
CMC-GLOBAL INSTITUTE (ICMCI)



## SHARED SERVICES CENTERS



PROCUREMENT OF "CONSULTING CATEGORY"  
FOR PURCHASING OFFICERS AND C-SUITE  
LEADERS WHO BUY SERVICES FROM  
CONSULTANTS

# Our Goals:



## e-Consulting Global Solutions

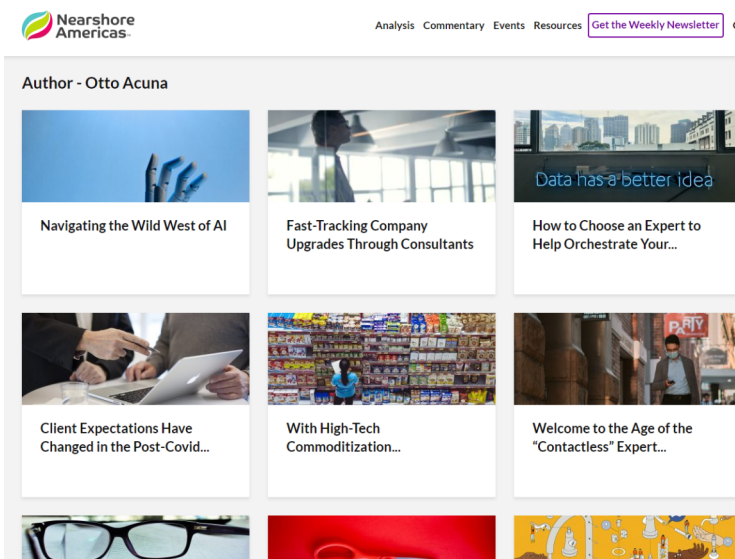
- We want to be your digital delivery partner, **providing you with enablement services** that leverage new technologies or specific subject matter expertise to expand your services.
- Through **our managed services acting backstage as a provider**, your consulting practice can offer an expanded portfolio of enhanced digital and methodological services to their clients **under your own brand**.
- We never contact directly or sell to end-clients, only through our allied consulting companies.



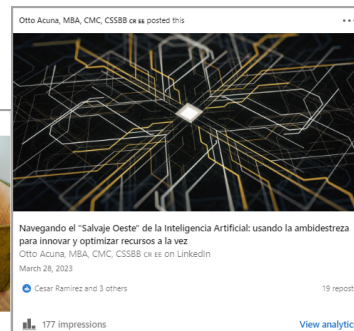
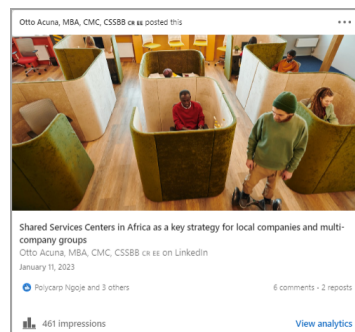
# Thought Leadership

As part of our mid-term strategy

## NearshoreAmericas Magazine



<https://nearshoreamericas.com/author/otto-acuna/>



[https://bit.ly/LKD\\_OAN\\_PUBS](https://bit.ly/LKD_OAN_PUBS)

## Arabian Business Magazine



### Otto Acuna

Otto Acuna is an Internationally Certified Management Consultant that helps organizations to work better through strategy, operational improvement, and digital transformation. He is also a serial entrepreneur with currently 3 brands and lines of service:

- 1- A consultancy serving Latin America and the Middle East
  - 2- A B2B business supporting small and medium consultancies worldwide
  - 3- A private-clouds business for Central America and the Caribbean region
- Otto has over 20 years of experience in managerial and non-manufacturing processes and industries. He has industry expertise in Corporate Back-Offices, Financial Services, Shared Services Centers, Not-for-Profits, Retail and Logistics, as well as broad experience in back office functions for any organization (HR, Finance, Procurement, FS Operations, CRM and sales administration, and Logistics). He is highly engaged and involved with business optimization through the use of leading-edge technologies.

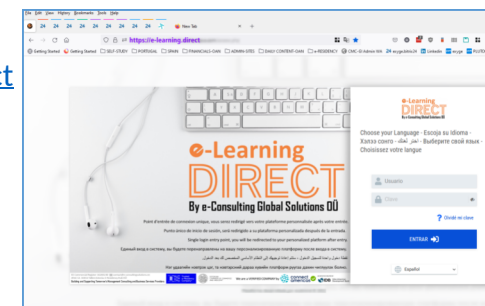


Otto is the first CMC-Certified Consultant in the Spanish Latin America region and also trained in ISO20700, being the only certified trainer available for the Spanish speaking world. He volunteers as the Chair of the Professional Development Committee at CMC-Global Institute the international arm of ICMCI, the organization that regulates the Management Consulting profession in more than 50 countries and territories worldwide. He also volunteers with ICMCI in the Quality Assurance Committee where he supports the tri-annual audit of management consulting institutes worldwide.

<https://www.arabianbusiness.com/author/otto-acuna>

## MID-TERM STRATEGY: BACKWARD INTEGRATION

<https://e-learning.direct>  
Provides the infrastructure for your content.



CONSULTANT  
DEVELOPMENT



CONSULTANT DEVELOPMENT

CLUB

THE COMMUNITY TO GROW YOUR PROFESSIONAL SKILLS

ECOSYSTEM FOR THE DEVELOPMENT  
OF CAPABLE PROFESSIONAL CONSULTANTS  
EQUIPPED WITH OUR TOOLS AND METHODOLOGIES

# Usual Q&A

for e-Consulting Global Solutions OÜ

**Q:** How much does your service cost?

**A:** Our business model is to form an alliance or joint venture for a long-term relationship. In most cases there is no upfront cost to the consultancy, rather a sharing of new business based on our joint capacities.

**Q:** What is FATCA / CRS (*common reporting standard*)?

**A:** Both are regulatory compliance reports that Financial Institutions struggle to produce every year. If the consultancy and/or Association's members have FS clients, our service allow members to go to them with a easy to buy value added service that "keep the consultancy in the client's ecosystem over the long term", fostering more contact opportunities to sell other services. Our service handles any variation of the compliance reports for any country in the world.

**Q:** What's the usual evolution path?

**A:** We take the time to interview our clients (the consultancies) to understand their market, their strengths and their buyers, and jointly set a plan to start with a service that has high probability of success. Based on that plan we increase the number of services as our client becomes more proficient in new tech or methods.

**Q:** What's the difference between a consultancy and an Association of Consultants?

**A:** The Association's clients are its members, so we work with the Association on capacity building that will lead to capabilities in their members that will allow them to get more business with their niche market.

Simultaneously, we work with the Association itself to leverage their trainers and courses towards e-learning. In some cases, this means to enable e-commerce for members or the general public to pay with credit cards, even in their local currency or crypto if needed.



# Usual Q&A

for e-Consulting Global Solutions OÜ

**Q:** Is there a contract to sign?

**A:** Yes, our alliances with clients (the consultancies or associations) are backed by a framework agreement that allow to start with 1 service and include additional services as the relationship evolves. The agreement protects both sides on 3 items:

- i. **Intellectual Capital:** both sides are exposed to each other's *know-how*, therefore, that intellectual property should not be used outside the relationship set by both parties.
- ii. **Client Relationship Capital:** both sides will be introduced to new “end-clients” (the beneficiaries of consulting services), who should not be contacted outside the agreement. (1)
- iii. **Confidentiality:** about end-client projects and their associated information, unless agreed specifically by both parties.

our agreement is grounded in the principles of good faith and ethical behaviour in business.

**Q:** Do I get exclusivity with the agreement?

**A:** No, because “exclusivity” is very hard to define in a world that does business globally. But our model does not foster having more than one alliance in each niche market. Because we are interested in long-term relationships, where we transfer knowledge to our client consultancy, it does not make sense to have many consultancies competing among each other on the same niche market.

# Usual Q&A

for e-Consulting Global Solutions OÜ

**Q:** How does *second-floor* consulting work?

**A:** Second-floor consulting is aimed at providing specialized expert resources (consultants) to supplement your local team's capabilities temporarily or on "per-project" basis, in most cases through video-conferencing or remote work.

Our business model aims at creating the capacity locally, in your team. But there are two situations in which you may need external experts that supplement your capacity:

- i. When you need their credentials, expertise and references to win your first assignments and create a local track of projects in one area of expertise. In this case the support is temporary and should disappear when you get experience and local credentials to support your marketing and sales process.
- ii. When there is a spot-project that requires that reinforcement of the local team for a specific task or section of a bigger project within the specialization of the partner consultancy.

**Q:** What happens when the consulting firm does not want to develop a particular capability and prefers to outsource?

**A:** When a consulting firm does not wish to develop in a particular field of knowledge or capability, **either to avoid diluting its focus or for market reasons** (for example, to avoid the perception of a "jack of all trades" in the market), it is possible to collaborate with e-CGS by outsourcing specific elements of a project through our second-floor consultancy.



# Contact Info:

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We work with small and medium consultancies, consulting associations and business services providers, under their own brand, to digitize and expand their services portfolio with the latest technologies and methodological tools.

Send us an email with your feedback, as well as information about your practice or consultancy and particular area of interest and we will setup a call to further explain and identify next steps.

Check Us Out!

<https://e-consultingsolutions.ee>

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/company/econsultingsolutions/



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ConnectAmericas



@e-ConsultingGlobalSolutions

*We work under the highest standards of the industry*



Guidelines for Management  
Consultancy Services  
20700:2017



CMC - GLOBAL



European Committee  
for Standardization  
16114:2011



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