

A Work Project, presented as part of the requirements for the Award of a Master's degree in  
Management from the Nova School of Business and Economics.

**Leveraging ISO 9001:2015 to Optimize Business Processes and Organizational  
Structures for Competitive Resource Utilization.**

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12/12/2024

**Abstract** (100 words maximum)

This thesis explores how a Costa Rican company can organize itself to leverage competitive resources using ISO 9001:2015 as a framework for quality management system implementation. Focusing on Clauses 4 through 6, the study illustrates the application of organizational context analysis, leadership development, and actionable planning. Notably, Clauses 4.4 and 5.3 form the foundation of the quality management system. The findings are specific to this company and are not intended for broader generalization. Limitations include the scope of implementation and resource constraints that prevented official certification and KPI measurement. Future research should focus on full implementation and KPI validation.

Keywords: ISO 9001:2015, Quality Management System, Competitive Resources, Strategy Implementation, Implementation Strategies

This work used infrastructure and resources funded by Fundação para a Ciência e a Tecnologia (UID/ECO/00124/2013, UID/ECO/00124/2019 and Social Sciences DataLab, Project 22209), POR Lisboa (LISBOA-01-0145-FEDER-007722 and Social Sciences DataLab, Project 22209) and POR Norte (Social Sciences DataLab, Project 22209)

## **1. Introduction**

A Costa Rican based company has positioned itself as an intercultural bridge, fostering connections between local businesses and industry-leading experts. The Company acts as an on-site representative for its clients, reducing risks and timelines to enhance returns on investment (ROI). Its primary focus is on individuals and businesses planning to invest in the Tourism & Hospitality sector in the Latin American (LATAM) market.

Operating with a lean team, the company relies on a network of industry experts – referred to as its consortium – for specialized tasks. Experts range from lawyers and accountants to politicians, lobbyists, and customs agents. The internal team primarily focuses on streamlining communication and culturally translating information between the consortium and clients. Therefore, the company can be seen as a cultural intermediary offering business development services. With Costa Rica's Tourism and Hospitality sectors attracting numerous foreign investors – and the potential for significant cultural differences – the market presents a prime opportunity (Costa Rica – Country Commercial Guide, n.d.). The company has built a strong client base and is receiving various referral projects. However, as demand grows, the need for infrastructure to accommodate this expansion has become critical. In response, management has experimented with various systems.

The Company soon recognized the need for an additional resource, focused only on designing a scalable infrastructure to facilitate projected growth. Hence, a role was created dedicated to identifying potential challenges, researching solutions, outlining strategies, and taking the first steps toward implementation of such infrastructures.

Motivated by the challenge of building structures in a culture often characterized by the opposite, my desire to explore new cultures and expand my horizon, as well as the potential entrepreneurial opportunities this venture promised, I accepted the position.

Aligned with my role and motivations, this research aims to answer the following question:

**How can a business organize itself to fully exploit its competitive resources?**

To address this question, this thesis will begin with a comprehensive introduction to the company and the market in which it operates. Subsequently, the findings from a literature review will be presented and critically evaluated. Finally, the thesis will outline the practical implementation of the framework derived from the literature, contextualized within the presented company.

## **2. Company Overview**

### ***2.1 The Companies Business Model***

The Costa Rican-based company is specializing in Business Development Services for the tourism and hospitality industry. Its primary focus is on on-site commercial representation for international investors and corporations (hereafter referred to as “clients”). Its unique combination of cultural translation skills, paired with a strong local partnership network sets the company apart from its competition. These attributes enable the company to offer a broad range of services, from market analysis to full-scale project management.

The company depends on its robust network of local partnerships, referred to as the "consortium," to execute the operational tasks. In contrast, the internal team ensures smooth communication by translating both cultural and linguistic nuances between clients and consortium partners. The consortium consists of leading industry experts, each with over 15 years of experience in their respective fields. This strategic setup allows the company to maintain a lean internal team while building strong, reliable partnerships. The business model targets Western (North American and European) investors, as well as organizations seeking to expand their operations in the region. Typically, clients are high-net-worth investors – often over the age of 60 – who lack the time to supervise projects on-site but want their interests represented.

## ***2.2 The Companies Unique Location***

The company's main office is in Tamarindo, a small beach town on the west coast of Costa Rica, with a population of approximately 7,800 inhabitants (Tamarindo, 2020). Tamarindo has become a favored destination for wealthy internationals, particularly Americans. Due to the rise in luxury tourism, the Guanacaste region (In which Tamarindo is located) has seen significant investments from around the world. Projects range from luxury estates in gated communities to infrastructure development, such as the expansion of the nearby Liberia Airport financed by countries and institutions like China, Saudi Arabia, and the European Investment Bank (Liberia Civil Aviation Authority, n.d.). However, despite these heavy investments, the region still suffers from infrastructure issues, which leaves many newly developed properties functioning as vacation homes or investment objects rather than full-time residences. The rising property values and living costs, particularly in prestigious cities like Tamarindo, have also contributed to this dynamic.

For the company, this creates the perfect client base: wealthy individuals who own property in the region but do not wish to live there full-time. These clients see opportunities in the developing economy but lack the cultural knowledge and network required to succeed. The company's role as the on-site representative for these investors allows the company to navigate the challenges of doing business in a developing nation on their behalf.

### ***2.3 Costa Rican Market Development***

Over the past decade, Costa Rica's economy has seen rapid growth, with its GDP increasing from \$30 billion in 2009 to \$86 billion in 2023. A significant portion of this growth – 6.3% of the national GDP in 2021 – comes from the tourism and hospitality sector, the companies primary focus (Costa Rica, n.d.). After rebounding strongly from the pandemic, the sector has gained further importance within the government, receiving substantial investments, particularly in Guanacaste (Dembicz & Carrillo, 2022). The region's beaches and luxury resorts have made it a hub for investment in infrastructure – such as electricity, water and transportation – but also for luxury real estate developments, including gated communities, upscale resorts and private villas (Dembicz & Carrillo, 2022). Driven by these developments the tourism and hospitality industry is expected to grow at an annual rate of 6.4% (Travel & Tourism – Costa Rica, 2024). The Costa Rican government is especially keen on promoting sustainable tourism projects, creating a favorable environment for future growth (Costa Rica, n.d.).

### ***2.4 The Companies Market Position***

As a developing nation, Costa Rica presents significant economic opportunities, especially for those who can navigate the difficult local landscape. Despite the promising returns, local

support infrastructure remains underdeveloped, resulting in minimal direct competition for the company. Although there are a few business development companies across the country, very few operate in the same niche as the company (Table 1). In particular, the Guanacaste region sees little to no competition, largely due to poor infrastructure. For instance, during the rainy season a 250 km trip from the capital, San José, – where most of the competition is located – to Guanacaste can take up to eight hours. As daily rain is expected during this time (lasting up to 6 Month), on-site representation becomes increasingly difficult, giving the company – with its office being located in Guanacaste – a competitive edge. The company also faces indirect competition from global players like Procomer, an international organization focused on enhancing trade. However, this competition is primarily centered around gaining investors attention, not service delivery. Chambers of commerce also play a role in facilitating investments and cross-border trade, often serving as the first point of contact for investors. Rather than competing with these entities, the company has positioned itself as a partner, leveraging its cultural translation skills and local network to secure partnerships with the German and French chambers of commerce.

## ***2.5 External Environment Analysis***

In addition to its competitive environment, the company is also influenced by the broader market environment. The PESTLE analysis evaluates the external factors that impact the company

- Political: Costa Rica provides a relatively stable political environment (Monge-Gonzales et al., 2010), although inconsistencies in policy and corruption do exist (Corruption Perception Index, n.d.). The government has been actively working toward sustainable development, with tourism and hospitality serving as key economic drivers.

- **Economic:** The country has seen stable economic growth, with a stable currency and low unemployment rates (The World Bank in Costa Rica, 2023). Investments in infrastructure, particularly in Guanacaste, are helping to further this growth.
- **Social:** When utilizing Hofstede's cultural dimension, one can find significant cultural differences between Costa Rican and western (Northern America & Europe) culture from where most of the company's clients originate. For example, Costa Ricans tend to be more collectivistic, risk-averse, and less driven by achievement and success compared to western (USA and Germany) scores (Country comparison tool, n.d.). Especially high risk-aversity and less drive for achievement and success tend to clash with clients, which typically are risk-takes and success driven. Overall, one may experience a general satisfaction with the status-quo among Costa Ricans and especially the locals in the Guanacaste region, which is known for its laid back and simple lifestyle. These differences in cultures and value create huge potential for conflict with western investors wanting to develop the region.
- **Technological:** Due to high import taxes, such as 30-50% import tax on new and used vehicles (Costa Rica – Import Tariffs, n.d.) and limited internal production, technological access can be difficult. Specialized tools and even car repair parts often need to be imported, causing delays. The country's infrastructure, especially in electricity, water, and transportation, is not designed to support the rapid growth Costa Rica has experienced (Costa Rica – Market Challenges, n.d.).
- **Legal:** Navigating Costa Rica's often incomplete or contradictory legal frameworks can be challenging (Doing Business in Costa Rica, n.d.). For example, the country's non-compliance with international tax standards has placed it on the EU's blacklist (Costa Rica – Market Challenges, n.d.).

- **Environmental:** Costa Rica experiences a long rainy season, making development projects highly seasonal. Extreme weather events such as storms and active volcanoes, combined with infrastructure challenges, add another layer of complexity to doing business in the country.

In conclusion, the PESTLE analysis reveals that while Costa Rica offers a stable political and economic environment conducive to business growth, it also has challenges stemming from cultural differences, technological limitations, legal complexities, and environmental factors. The political commitment to sustainable development positions tourism and hospitality as key sectors; however, the potential for cultural conflict between local attitudes and the expectations of foreign investors requires careful navigation. Furthermore, lack of infrastructure and weather conditions can hinder operational efficiency. Therefore, companies and investors operating in this market must have a strong understanding of these external influences to grasp the opportunities.

## ***2.6 Company Internal Analysis***

After understanding the market environment and external factors, it is important to analyze the companies resources through the VRIO framework to evaluate their potential for securing a sustainable competitive advantage. The company has determined that their most valuable resource is their consortium, and the most critical capability to be cultural translation skills.

Both, consortium and cultural translation skills are valuable not just to the company but also to its clients. The consortium helps the company overcome political, legal, and technological

issues by granting clients access to a network of local experts. This access mitigates risks, such as the "gringo tax," where foreigners are often charged higher rates than locals (gringo is a slang term for American). The cultural translation skills help bridge social differences, reducing the risk of miscommunication between clients and local partners. Although local networks may not be rare, combining them with cultural translation skills is what makes this resource unique and difficult to imitate. Hence, they shall be considered as a pair. Due to Costa Rica's collectivist culture, it can be challenging for foreigners to penetrate local networks. In the case of the company, the founders have spent years living with locals before being introduced and accepted into the local network as one of their own. Additionally, the cultural gap makes it difficult for both locals and foreigners to imitate the companies unique approach. The combination of Costa Ricans holding very little value for success and achievement, being risk-averse and a lack of education / opportunities in the country (Álvaro Murillo, 2024), leave only few who could attempt to imitate the pair of resource and capability.

Despite having developed a pair of resources and capabilities that is Valuable, Rare, and hard to Imitate, the company has not yet fully organized itself to capture the sustainable competitive advantage these pair provides. This gap in organizational structure has been found as one of the key issues when designing the infrastructure necessary to facilitate the projected growth.

## ***2.7 The Vision***

The Company has substantial growth potential given the favorable market dynamics and the company's resources and capabilities. Its mission is to expand its operations within the Guanacaste region, focusing on high-profile, prestigious projects rather than pursuing a high volume of smaller projects. The long-term vision is to not only become a leader in Costa Rica

but to eventually emerge as the leading business development company throughout Latin America.

With a clear understanding of both the internal and external environment, found that even though the company has successfully developed a pair of resources and capabilities that is Valuable, Rare, and hard to Imitate, it lacks an organizational structure that fully capitalizes on these assets to create a sustainable competitive advantage. Hence, the following research question has been established:

**How can a business organize itself to fully exploit its competitive resources?**

In the following this thesis outlines a literature review which identifies and outlines a feasible solution to this question and an implementation part in which it contextualizes the presented framework specifically to the company. The implementation of this structures will allow the company to unlock its full potential and create a sustainable competitive advantage.

### **3. Literature review**

#### ***3.1 Overview***

This thesis examines how a company can organize itself to fully leverage its competitive resources by turning to relevant literature. While numerous studies address this topic, few are applicable to the specific context of the company. Therefore, this literature review explores the most fitting frameworks, with a focus on actionable guidelines to help the company structure its operations and optimize its competitive resources. Identifying the right framework is

challenging, as much of the literature fails to provide practical implementation guidelines, especially for small businesses (Klute-Wenig & Refflinghaus, 2020).

Upon analyzing the company's needs, it became clear that enhancing key processes, particularly quality assurance, was critical for attracting international investors. In searching for frameworks to address this challenge, the implementation of a Quality Management System (QMS) emerged as the most suitable option. A QMS provides a structured approach to ensure consistent quality, aligning processes with customer expectations and contributing to competitive advantage. By standardizing its operations and improving quality control, the company is positioning itself to better meet international investor expectations, reduce operational risks, and enhance its reputation in a competitive global market. Although resource-intensive and subject to ongoing audits, a QMS offers the benefits of standardized operations, improved customer satisfaction, and a more credible market position (ISO 9001:2015, n.d.). Despite various frameworks offering substantial benefits, the company chose to implement a QMS due to the clarity and structure it provides, which is essential for small businesses. The ISO 9001:2015 standard, one of the most widely recognized certifications for quality management systems, offers a clear, step-by-step roadmap that is both actionable and applicable to small businesses (Klute-Wenig & Refflinghaus, 2020). While some studies debate the impact of ISO 9001:2015 on small and medium businesses, with some failing to find statistically significant performance improvements (Sitki İlkay & Aslan, 2012), the majority report positive effects (Lushi et al., 2016). Considering the company's internal and external context, including its growth aspirations and need for scalable, standardized operations, the decision to implement ISO 9001:2015 was driven by the need for a structured approach to quality assurance, with the intention of improving processes rather than immediately seeking certification.

### ***3.2 ISO 9001:2015***

ISO 9001:2015 is a globally recognized standard for quality management, designed to ensure that organizations meet customer expectations and achieve high levels of customer satisfaction through a QMS (Lushi et al., 2016). The QMS build in the ISO 9001:2015 is a structured framework which organizations can use to manage and improve their processes, products, and services to meet customer expectations and regulatory requirements. While the framework provided by the ISO 9001:2015 can be implemented by any organization, the motivations behind adoption often vary significantly (ISO 9001:2015, n.d.). The certification process is structured into 10 clauses. Clause 0 outlines the relationship between the clauses, while clauses 1–3 serve as introductory sections, covering the scope, normative references, and definitions. The core work begins with clause 4, which, along with clauses 5 and 6, lays out a comprehensive plan for implementing the QMS and takes first steps. Clauses 7 and 8 then guide the practical implementation of this plan, while clause 9 focuses on evaluating the impact. Lastly, Clause 10 addresses continuous improvement.

Throughout the certification process, seven key principles must be followed: Customer Focus, Leadership, Engagement of People, Process Approach, Improvement, Evidence-Based Decision Making, and Relationship Management (ISO 9001:2015, n.d.). Adherence to these principles will result in increased customer satisfaction, enhanced process efficiency, improved risk management, and higher levels of employee engagement and motivation (ISO 9001:2015, n.d.). Achieving ISO 9001:2015 certification not only provides enhanced credibility through global recognition but also enables organizations to organize themselves, maximizing resource utilization by identifying and addressing inefficiencies (Shaw, 2024). However, the certification process – particularly when seeking formal certification – requires a significant investment of

both time and financial resources. Additionally, companies may find it challenging to fully align with the standardized guidelines, especially when specific organizational needs or contexts do not fit the framework seamlessly.

In the context of this company, cultural differences present an additional challenge, particularly considering the countries complex cultural dynamics. As highlighted in the Social section of the PESTLE analysis, the cultural gap between Clients and Costa Rican norms is significant. This poses challenges for gaining stakeholder buy-in, listed as a key component of ISO 9001:2015 certification. Furthermore, local market conditions, including lower recognition of the certification's value, and differing regulatory and societal norms, may complicate the process of aligning with ISO 9001:2015 standards. Hence the company first decided to not pursue a formal certification. Given the limitations of this thesis, it will only be on the planning phase, covering Clauses 4 through 6 of the ISO 9001:2015. The planning phase establishes strategic alignment, maps out key organizational structures and processes, and outlines a systematic approach for implementation of a QMS. The QMS implementation will organize the company to fully exploit its competitive resources.

### ***3.3 ISO 9001:2015 – Clause 4 ‘Context of the Organization’***

Clause 4 establishes the foundation for understanding both internal and external factors that may impact the organization and is divided into four sub-clauses. Clause 4.1, “Understanding the Organization and its Context,” identifies external and internal issues and assesses their potential impact on the QMS implementation. Clause 4.2, “Understanding the Expectations of Interested Parties,” focuses on identifying stakeholders and determining their needs. Clause 4.3, “Determining the Scope of the QMS,” sets boundaries for the implementation process. Finally,

Clause 4.4, “The QMS and its Boundaries,” outlines the processes and their interactions within the organization.

By understanding the organizational context, the QMS can be tailored to meet not only local but also company-specific requirements. This enables stronger stakeholder engagement and ensures necessary strategic alignment. Since local differences have already been discussed in the company introduction, and defining the scope is relatively straightforward, this thesis will focus on Clause 4.4.

### ***3.4 ISO 9001:2015 Clause 5 ‘Leadership’***

Clause 5, “Leadership,” emphasizes the commitment, roles, and responsibilities necessary to establish, maintain, and continuously improve the Quality Management System (QMS). This clause is divided into three sub-clauses. Clause 5.1, “Leadership and Commitment” ensures that decision-makers are fully committed to the QMS and demonstrate this buy-in. Clause 5.2, “Quality Policy” focuses on setting clear objectives for the QMS implementation. Lastly, Clause 5.3, “Organizational Roles, Responsibilities, and Authorities” defines the roles and responsibilities required to ensure effective management and execution of QMS processes.

Clause 5 lays the leadership foundation for the QMS, with Clause 5.3 being particularly relevant for small businesses that often lack formalized structures. The focus on clear organization is expected to have direct business impact, enhancing core processes. Therefore, this thesis will specifically emphasize this clause.

### ***3.5 ISO 9001:2015 Clause 6 ‘Planning’***

Clause 6, “Planning” focuses on establishing a clear strategy for implementing and maintaining the QMS. It addresses how the organization plans to meet quality objectives and manage risks. The clause is divided into three sub-clauses. Clause 6.1, “Actions to Address Risks and Opportunities” identifies and manages risks and opportunities to maximize desired outcomes and prevent undesirable effects. Clause 6.2, “Quality Objectives and Planning to Achieve Them” requires the organization to set clear quality objectives for relevant processes. Finally, Clause 6.3, “Planning of Changes” details a systematic approach for implementing and maintaining changes. As the company operates in a highly volatile market, where certain risks are unavoidable a QMS becomes even more critical. By reducing operational risk, it serves the companies clients, that are already burdened with substantial market risks.

### ***3.6 Synthesis***

The ISO 9001:2015 framework stands out as the most effective approach for organizations seeking to organize their operations to fully exploit their competitive resources. By utilizing the planning phase – Clauses 4 through 6 – the organization can lay a solid groundwork for successful QMS implementation. By creating a clear strategy and taking the first steps into the implementation it allows the company to become more organize and fully exploit its competitive resources. The interconnection of these clauses ensures effective process management (Clause 4.4), which relies on clearly defined roles and responsibilities (Clause 5.3). Clauses 4.4 and 5.3 will create the center of the QMS by strategizing the key process in the company, hence enabling the company to organize itself to exploit its full competitive advantage.

## **4. Implementation**

### ***4.1 Introductory Sentences***

After identifying the lack of organization – within the context of the VRIO framework – as the most significant challenge and outlining a literature-based solution, the following implementation section will follow the ISO 9001:2015 framework and take initial steps towards deployment. The implementation will follow the original guidelines while incorporating advice from various organizations that specialize in ISO 9001:2015 implementation consultancy. As outlined in the literature review, the implementation section will present a selection of the results for Clause 4: ‘Context of the Organization’, Clause 5: ‘Leadership’ and Clause 6: ‘Planning’.

All presented information was provided by the company through practical experience in the respective roles, dedicated meetings, coffee chats and document reviews. Furthermore, results have been created in an agile approach with continues improvements and collaboration.

### ***4.2 Clause 4 | Context of the organization***

#### ***4.2.1 Clause 4.1 | Understanding the organization and its context***

The purpose of Clause 4.1 is to gain an understanding of the organization and its context providing the context to establish an initial roadmap for QMS implementation. It is recommended to examine both the external and internal environments. The certification guide suggests using frameworks such as PESTLE and SWOT or VRIO Analysis. Since both internal and external environment has already been covered in the company introduction, this section will not revisit it.

#### ***4.2.2 Clause 4.2 | Understanding the needs and expectations of interested parties***

Clause 4.2 requires the company to identify relevant parties to the QMS and their respective requirements. The goal is to understand stakeholders who may affect the QMS's ability to deliver its objectives.

Following an analysis of key stakeholders within the company, Table 2 has been developed to provide an overview of these interested parties, their needs, expectations, and how to address potential issues. It becomes evident that the most critical stakeholders are employees, clients, and consortium partners, as they are directly impacted by the QMS. Due to Clients high individual and varying demands, capturing their need is particularly challenging.

#### ***4.2.3 Clause 4.3 | Determining the scope of the quality management system***

Clause 4.3 requires the company to establish the scope of its QMS implementation. This scope will appear as the title on the certification and should be concise, limited to no more than 15 words. Even though the organization does not aim to obtain the official certification it still leverages this clause to determine the scope.

The company decided on the following scope: "Business development company located in Tamarindo, Costa Rica, offering on-site commercial representation and cultural translation." This decision reflects the QMS's impact on the entire business, with a particular emphasis on client communication and cultural translation.

#### ***4.2.4 Clause 4.4 | Quality management system and its processes***

Clause 4.4 is a key component in the QMS implementation process, requiring detailed attention. This clause requires the company to map out all key processes, or in the case of this company, the primary process. This key process will serve as the foundation for the QMS and will help the company organize its resources to capture their full potential.

Given that the company's primary resource is its consortium and the main capability lies in cultural translation, the key process for the QMS will focus on managing communication between the client and the consortium. In accordance with ISO 9001:2015 requirements, this process flow has been outlined in Figure 1 which will be presented in a final form under chapter '4.2.3 Clause 5.3 | Organizational roles, responsibilities, and authorities'. The QMS will emphasize the interaction between processes and the allocation of responsibilities, which will be required by Clause 5.3 – hence, Figure 1 illustrates a combination of both Clause 4.4 and Clause 5.3.

#### ***4.2 Clause 5 | Leadership***

##### ***4.2.1 Clause 5.1 | Leadership and commitment***

Clause 5.1.1 'Leadership and commitment' requires evidence of top management's dedication to the process, as well as the designation of a key resource responsible for the implementation. In the company's case, my role has been specifically developed to take on this responsibility, and top management's commitment is demonstrated through ongoing engagement and support, such as providing me with all necessary information – as outlined in the methodology.

Clause 5.1.2 ‘Customer Focus’ discusses one of the core principles of QMS implementation. This clause directs the company to use the stakeholder analysis from Clause 4.2 to identify customer requirements. As also mentioned in Clause 4.2, the Company acknowledges that Clients originate from various backgrounds and jurisdictions, therefore hold varying set of requirements. After consulting with trusted Clients, the company has decided to allow for the customization of the QMS for each individual project, tailoring the process illustrated in Figure 1 to the specific needs of the Client. These requirements will be discussed and finalized between the CRM and the customer during the ‘Pre-Project 2/2’ phase, as illustrated in Figure 1. The created checklist and procedure for this conversation has been laid out in Document 1.

#### ***4.2.2 Clause 5.2 | Policy***

Clause 5.2.1 ‘Establishing the quality Policy’ requires the company to formulate a clear quality policy statement. This policy statement should define quality and establish it as a standard. The company has crafted the following quality management statement: “The Company is committed to developing businesses in the LATAM market by culturally translating information between clients and a network of industry experts. By leveraging the ISO 9001:2015, we aim to expand in the Costa Rican market.” In addition to this statement, the company is committed to following a Client-first approach by allowing for individualized quality standards.

Clause 5.2.2 ‘Communicating the quality policy’ requires the company to effectively communicate the established quality policy to all stakeholders. The company has decided to communicate its quality policy internally through an in-person team meeting. Additionally, a dedicated call will be held with consortium partners to ensure alignment. For customers, the

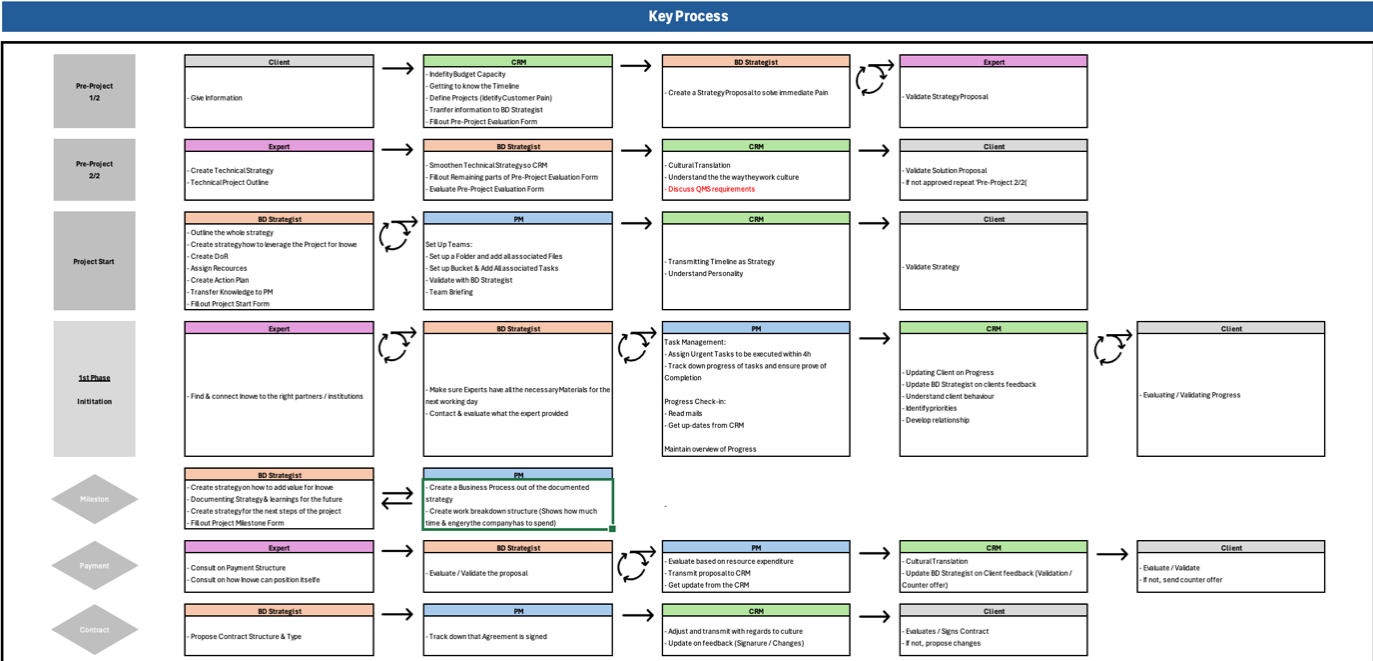
quality policy will be conveyed via marketing channels and further explained during the initial introduction call.

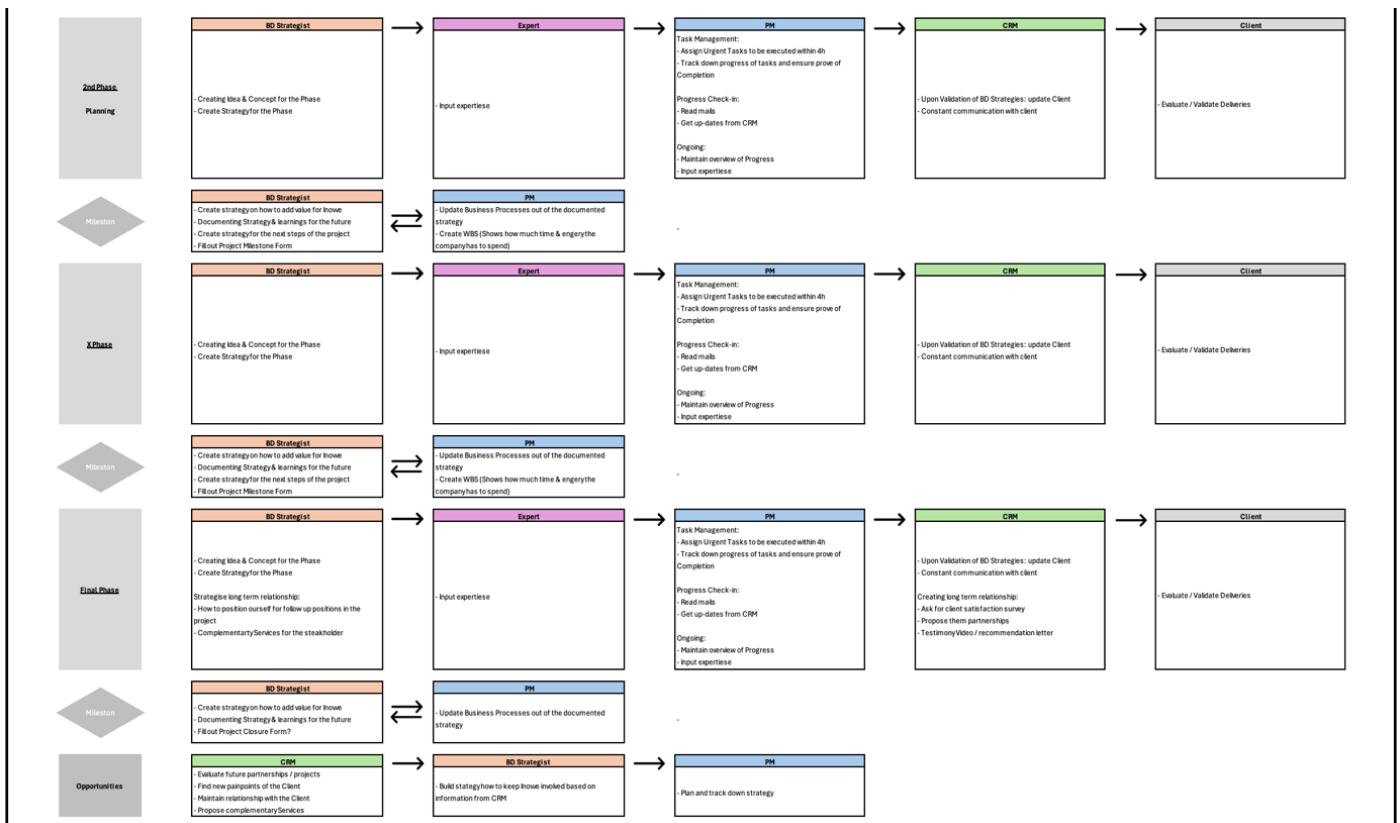
**4.2.3 Clause 5.3 | Organizational roles, responsibilities, and authorities**

Clause 5.3 is another critical element in the QMS implementation process and, together with Clause 4.4, require especial attention. Clause 5.3 not only requires the creation of clear roles but also mandates mapping responsibilities along the key process identified in Clause 4.4.

In compliance with these requirements, role descriptions have been developed (Document 2, 3 & 4). Additionally, Figure 1 first introduced in Clause 4.4, clearly defines the responsibilities of each role along the key process. All employees have been briefed on both their roles and responsibility in in-person meetings. The illustration of the key process, using a distribution of responsibility matrix, has enabled the company to streamline the process and create clear responsibilities.

**Figure 1 – Improved Key Process**





## Clause 6 | Planning

### 4.3.1 Clause 6.1 | Actions to address risks and opportunities

Clause 6.1 requires the company to create a risk mitigation plan. Within this plan, potential risks for the QMS should be identified, assessed and a respective response outlined.

The companies risk management process follows a structured and continuous approach, ensuring that potential risks are consistently evaluated and addressed. The risk assessment follows the following steps: Identify, Assess, Respond, Review, and Report/Monitor. With regards to the limitations of this thesis, it will only outline the process for the most important risk, Cultural differences. As introduced in the PESTLE, cultural differences not only carry conflict potential with Clients but also with the company itself. Especially implementing a very

structured QMS can be challenging for the relationship. Hence the company has decided to minimize the responsibilities for partners to their own tasks, while taking over task management and communication – being a constant intermediate between Consortium and Client. To ensure that no information is lost, and the client receives streamlined information, the key process illustrated in Figure 1 is followed. The risk is to be constantly monitored through bi-monthly feedback meetings with consortium partners, clients, and employees.

#### ***4.3.2 Clause 6.2 | Quality objectives and planning to achieve them***

Clause 6.2.1 ‘Establishing Objectives’ asks the company to create clear objectives and milestones. These objectives should be in line with the in Clause 5.2 set quality policy as well as the customer requirements from Clause 5.1.2. However, they also need to consider the context found in Clause 4 to determine realistic objectives. Aligned with the company’s quality statement, objectives and milestones displayed in Table 3 have been established, focusing on maintain a high level of customer satisfaction.

Clause 6.2.2 ‘Objectives & Planning to achieve them’ builds up on the previously set objectives and asks the company to outline a clear plan how it will achieve the objectives. The company will achieve its objectives for customer satisfaction by implementing a robust client engagement strategy that includes regular check-ins and feedback sessions, ensuring that client needs and expectations are consistently met. This proactive approach, combined with our commitment to achieving internal performance targets, will foster stronger relationships with our customers and enhance their overall experience. Additionally, we will ensure that internal targets are met through the effective implementation of our QMS, which will provide a structured process and clearly defined responsibilities for all team members.

### ***4.3.3 Clause 6.3 | Planning of Changes***

Clause 6.3 asks for a clear plan to implement and react to changes to the QMS, considering associated risk and potential for necessary process adaptations. It is recommended to use an agile approach in which you implement a constant feedback loop. After careful consideration of several examples, the company has defined the process for change illustrated in Figure 2. It is to be applied in the initial implementation as well as used to assess any changes that impact the key process.

### ***4.4 Closing Sentences***

This section has successfully provided the company with clear guidelines for implementing a Quality Management System (QMS) and has already initiated the first steps. Specifically, Clauses 4.4 and 5.3 have laid the foundation for the QMS, optimizing the company's key processes. These clauses directly influence daily operations by defining roles and responsibilities, aligning them with improved processes. Streamlining these processes not only eliminates redundancies but also boosts operational efficiency, creating a more agile, responsive organization. By clarifying roles, the company will experience better internal coordination, which will, in turn, enhance client interactions through a single point of contact. The process improvements outlined in Clause 4.4 allow the company to scale its services to a larger customer base while maintaining a lean, highly efficient team. This balance between efficiency and service capacity is essential for sustaining long-term growth. The decision to implement ISO 9001:2015 will significantly enhance the company's quality management system and provide a structured framework for aligning operations with broader strategic goals. As the company transitions from an entrepreneurial, ad-hoc approach to a more formalized, process-

driven organization, it will be better equipped to leverage its resources, mitigate risks, and capitalize on new opportunities. The ISO 9001:2015 framework provides actionable insights that will empower the company to refine its strategic direction, with a focus on consistent, high-quality outcomes. Furthermore, the clear role definitions in Clause 5.3 will simplify recruitment, making it easier to attract and integrate new talent into the organization. This will support scalability without compromising the company's core strengths. As the company implements Clauses 6 through 10, it will fully realize the benefits of a comprehensive QMS, driving continuous improvement and reinforcing its competitive position in the market. In summary, the key takeaway from this implementation is the substantial and material impact of ISO 9001:2015. The framework not only streamlines operational processes but also enables the company to take a more strategic, long-term view of growth, ensuring that its resources are leveraged effectively and efficiently to meet evolving market demands.

## **Conclusion**

In conclusion, this research set out to answer the question of how a business can organize itself to fully exploit its competitive resources. In the case of the company studied, it was found that adopting a Quality Management System (QMS) based on ISO 9001:2015 provides a structured and effective approach to optimizing business processes and aligning organizational structures. Specifically, ISO 9001:2015 helped address key aspects of organizational design – such as process optimization, leadership clarity, and responsibility definition – which are crucial for leveraging competitive resources.

The study emphasizes the importance of Clauses 4 through 6 of ISO 9001:2015 as foundational elements for the preparation and implementation of a QMS. Clause 4.4

facilitates the mapping and optimization of core processes, while Clause 5.3 ensures clear leadership and role definitions, creating the necessary alignment for operational efficiency. These clauses create positive impact on the company, including improved internal coordination, enhanced scalability, and better customer interaction. However, it is essential to note that these findings are qualitative and only to the company in question. Further research is required to track results and evaluate whether the same results can be generalized to other organizations or industries.

The limitations of this study – such as its focus on only Clauses 4 through 6, and the absence of formal certification – mean that the broader impact of ISO 9001:2015 cannot be fully assessed. Future research should explore the complete implementation of the ISO 9001:2015 and assess its long-term impact on key performance indicators to provide a more comprehensive evaluation of its effectiveness in optimizing business processes and organizational structures.

In summary, this thesis demonstrates that ISO 9001:2015 offers a promising framework for businesses to organize themselves in a way that maximizes their competitive resources. While it provides clear benefits for process improvement and resource alignment in this specific context, the broader applicability and long-term effectiveness remains to be tested in future studies.

## Appendix

**Table 1 – Competitor Overview**

Name	Service	Strength
Café Empresarial	Market entry strategy, local partnerships, and operational support	Strong local network, expertise in regulatory compliance, and bilingual staff
Costa Rica Business Solutions	Market research, business matching, and site selection	Deep knowledge of tech ecosystem; strong ties with government entities
Consultoría y Desarrollo Empresarial (CDE)	Business planning, local market analysis, and operational management	Diverse client base; extensive industry experience
Grupo ACI	Business setup, local representation, and marketing services	Flexible service packages and a strong reputation for customer service
Transparencia Empresarial	Regulatory compliance, local representation, and risk management	Strong legal expertise; high level of trust among clients
Inversiones y Desarrollo CR	Market entry, project management, and local partnership development	Established network in the tourism sector; good local market knowledge

**Table 2 – Expectations management of interested parties**

<b>Interested Parties:</b>	<b>Needs and expectations:</b>	<b>How to capture key issue:</b>
Management	Growth, Revenue, Stability	Client Satisfaction QMS System
Employees	Company Culture & Tasks	Employee Feedback Meetings
Clients	Price, Reliability, Value, Simplicity, Trust	QMS Systems Weekly Progress Meetings
Consortium (Partners)	Customers Quality Trust	Growth plan meetings QMS Systems
Local Authorities and Gov.	Compliance Reporting	Not QMS related
Network	Access to Partners Access to Investors	Networking Initiatives / Events
Chambers of Commerce	Price, Reliability, Value, Simplicity, Trust, Representation	QMS Systems Quarterly Meetings
Community	Benefit from Investments	Charity Events

## **Document 1 – QMS Customization Checklist for Client Collaboration**

**Client Name:** \_\_\_\_\_

**Project Name/ID:** \_\_\_\_\_

### **Section 1: General Information**

- Stakeholder Identification:
  - Identify key stakeholders from the client's side.
  - Determine roles and responsibilities for each stakeholder involved in the project.
- Project Overview:
  - Brief description of the project scope and objectives.
  - Timeline and major milestones.

### **Section 2: Client Requirements**

- Client Expectations for Product/Service Quality:
  - What are the critical success factors for the client regarding quality?
  - Are there any specific quality metrics the client values (e.g., defect rate, delivery time, customer satisfaction)?
- Customization Needs:
  - Custom documentation requirements (e.g., templates, reports, certifications).
  - Special governance needs (e.g., oversight, decision-making processes).
  - Additional compliance or regulatory requirements (e.g., industry-specific certifications, local jurisdictional rules).

- **Process Tailoring:**
  - Custom workflows or procedures that the client requires.
  - Specific tools/software for project management or documentation.

### **Section 3: Documentation and Reporting**

- Required Documentation:
  - Project plan
  - Technical specifications
  - Progress reports
  - Change control logs
  - Quality assurance checklists
  - Testing and validation protocols
  - Delivery acceptance forms
- Timesheet and Resource Management:
  - Does the client require specific time tracking or timesheets for staff and contractors?
  - Frequency and format of resource utilization reports (e.g., weekly, monthly).
- Approval/Sign-Off Processes:
  - Does the client require any formal sign-offs at specific milestones?
  - Specify approval timelines for each milestone.

## **Section 4: Communication and Collaboration**

- Project Meetings:
  - Frequency of status meetings (e.g., weekly, bi-weekly).
  - Preferred method of communication (e.g., in-person, virtual, email).
- Escalation Procedures:
  - Define a clear escalation path for issues or risks.
  - Specify points of contact for each escalation level.
- Risk Management:
  - Does the client require a specific risk management process?
  - Are there any particular risks the client is concerned about?

## **Section 5: Quality Assurance and Continuous Improvement**

- Quality Control Measures:
  - Are there any specific quality assurance checkpoints the client expects?
  - Does the client have preferred testing or inspection methods?
- Feedback Mechanism:
  - Does the client expect regular feedback or review cycles during the project?
  - How should client feedback be documented and acted upon?

## **Section 6: Compliance and Certification**

- Regulatory Compliance:
  - Are there any local, regional, or industry-specific compliance requirements?
  - Is there a need for an audit trail or formal compliance documentation?
- Certification Needs:
  - Does the client require any certifications or formal qualifications as part of the project?

## **Section 7: Final Review and Confirmation**

- Customization Confirmation:
  - Client has reviewed and approved the custom QMS processes for this project.
- Project Timeline and Milestones:
  - Ensure the customized QMS timeline aligns with the overall project schedule.
- Roles and Responsibilities:
  - Confirm roles and responsibilities for both parties regarding QMS implementation.
- Sign-Off:
  - Client's designated representative signs off on the customized QMS plan.

## Document 2 – CRM Description

Job Reference Number	1
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<b>Job Title:</b>	<b>Customer Relationship Manager</b>
<b>Job Purpose</b>	To serve as the primary liaison between the company and its clients, ensuring effective communication and fostering strong relationships to enhance customer satisfaction and loyalty.
<b>Role Dimensions</b>	<ul style="list-style-type: none"> <li>- Manage multiple client accounts, with a focus on understanding and addressing their unique needs and challenges.</li> <li>- Balance customer expectations with company capabilities to ensure mutually beneficial outcomes.</li> </ul>
<b>Key Responsibilities and Accountabilities</b>	<ul style="list-style-type: none"> <li>- Act as the single point of contact for assigned customers, addressing inquiries and resolving issues promptly.</li> <li>- Facilitate cultural translation of information to ensure clear understanding across diverse client backgrounds.</li> <li>- Develop a deep understanding of each client's budget, timeline, and organizational culture.</li> <li>- Identify and address customer pain points, working collaboratively to develop tailored solutions.</li> <li>- Build and nurture relationships through social engagements such as dinners, cocktail events, and trips.</li> </ul>
<b>Competencies Required for the Role</b>	<ul style="list-style-type: none"> <li>- Strong interpersonal and communication skills.</li> <li>- Proficient in cultural awareness and sensitivity to adapt communication styles.</li> </ul>
<b>Qualifications and Experience</b>	<ul style="list-style-type: none"> <li>- Bachelor’s degree in Business, Marketing, or a related field.</li> <li>- Proven experience in customer relationship management or account management roles.</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>- Strong negotiation and conflict resolution skills.</li> <li>- Proficiency in CRM software and Microsoft Office Suite.</li> <li>- Ability to analyze customer data and translate insights into actionable strategies.</li> </ul>
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>- Empathetic and approachable, with a genuine interest in client well-being.</li> <li>- Resilient and adaptable to changing circumstances.</li> </ul>
<b>Other Factors</b>	<ul style="list-style-type: none"> <li>- Willingness to travel for client meetings and events.</li> <li>- Flexibility to work outside regular hours for client engagements as needed.</li> </ul>

### Document 3 – BD Strategist Description

Job Reference Number	2
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<b>Job Title:</b>	<b>Business Development Strategist</b>
<b>Job Purpose</b>	To develop and implement strategic business initiatives that drive growth, enhance market presence, and foster partnerships, ensuring alignment with the company’s overall goals.
<b>Role Dimensions</b>	<ul style="list-style-type: none"> <li>- Collaborate with management to define business development strategies and proposals tailored to client needs.</li> <li>- Engage with various stakeholders, including internal teams and external partners, to facilitate cohesive efforts.</li> </ul>
<b>Key Responsibilities and Accountabilities</b>	<ul style="list-style-type: none"> <li>- Develop and present strategic proposals to clients that align with their objectives and the company’s offerings.</li> <li>- Communicate effectively with consortium partners to ensure mutual understanding and collaboration on projects.</li> <li>- Manage resources effectively to support strategic initiatives and ensure project success.</li> <li>- Oversee stakeholder relationships, ensuring their needs are met and fostering long-term partnerships.</li> </ul>
<b>Competencies Required for the Role</b>	<ul style="list-style-type: none"> <li>- Strong analytical and strategic thinking skills to assess market trends and client needs.</li> <li>- Excellent communication and presentation skills for engaging with diverse audiences.</li> </ul>
<b>Qualifications and Experience</b>	<ul style="list-style-type: none"> <li>- Bachelor’s degree in Business Administration, Marketing, or a related field; MBA preferred.</li> <li>- Proven experience in business development, strategic planning, or related roles.</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>- Strong negotiation and persuasion skills.</li> <li>- Ability to analyze data and market research to inform strategic decisions.</li> </ul>
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>- Proactive and results-oriented mindset.</li> <li>- Strong interpersonal skills with the ability to build rapport quickly.</li> </ul>
<b>Other Factors</b>	<ul style="list-style-type: none"> <li>- Willingness to travel for business meetings and networking events.</li> <li>- Flexibility to adapt strategies based on changing market dynamics and client feedback.</li> </ul>

## Document 4 – PM Description

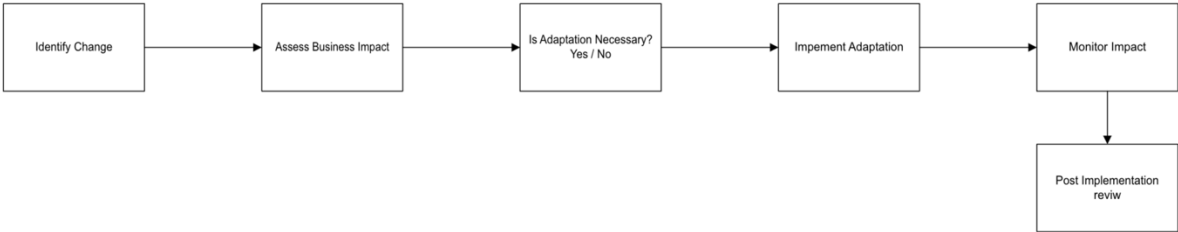
Job Reference Number	3
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<b>Job Title:</b>	<b>Project Manager</b>
<b>Job Purpose</b>	Ensure the effective implementation and maintenance of the ISO 9001:2015 Quality Management System (QMS) through project and task management, continuous improvement, and documentation.
<b>Role Dimensions</b>	<ul style="list-style-type: none"> <li>- Oversee multiple projects.</li> <li>- Collaborate with cross-functional teams.</li> <li>- Monitor resource allocation and performance metrics to optimize process efficiency.</li> </ul>
<b>Key Responsibilities and Accountabilities</b>	<ul style="list-style-type: none"> <li>- Manage projects related to QMS implementation and improvements.</li> <li>- Develop and maintain Work Breakdown Structures (WBS) for various initiatives.</li> <li>- Facilitate continuous improvement initiatives to enhance key processes.</li> <li>- Ensure proper documentation of processes, and improvements to maintain compliance.</li> </ul>
<b>Competencies Required for the Role</b>	<ul style="list-style-type: none"> <li>- Analytical skills to assess and report on resource utilization and process performance.</li> <li>- Excellent communication skills for effective stakeholder engagement.</li> </ul>
<b>Qualifications and Experience</b>	<ul style="list-style-type: none"> <li>- Bachelor’s degree in Business Administration, Quality Management, or a related field.</li> <li>- Experience in project management.</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>- Strong documentation and report-writing skills.</li> <li>- Familiarity with continuous improvement methodologies (e.g., Six Sigma, Lean).</li> </ul>
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>- Proactive and results-driven, with a focus on continuous improvement.</li> <li>- Strong leadership qualities with the ability to motivate and influence teams.</li> <li>- Adaptable and open to change in a dynamic work environment.</li> </ul>
<b>Other Factors</b>	<ul style="list-style-type: none"> <li>- Willingness to undertake ongoing training and development related to quality management.</li> <li>- Ability to work collaboratively in a team-oriented environment.</li> <li>- Flexibility to manage changing priorities and deadlines effectively.</li> </ul>

**Table 3 – Quality Objectives**

Objective	KPI	Scale	Required Score	Data Source
Loyalty	Net Promoter Score (NPS)	0 – 100	50	Quarterly surveys
Retention	Client Retention Rate	0% – 100%	90%	Monitoring retention metrics bi-annually
Satisfaction	Customer Feedback Score	0 – 5 (5 being highest)	4	Distribute during projects and check Quarterly
Performance	Internal Performance Rate	0% - 100%	85%	Monthly review of on-time task completion and resource efficiency
Feedback	Qualitative	-	-	Interviews with Employees, Customers and Partners

**Figure 2 – Change Process**



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