

Expertise

Integrated Planning & Reporting

Transforming finance into a strategic business partner

Overview

Organisations today operate in an environment where financial planning and reporting are no longer back-office functions — they are core drivers of competitive advantage. Yet many finance teams remain constrained by fragmented data sources, manual processes, and forecasting methods that fail to keep pace with business complexity.

At Centida, our team of finance and FP&A specialists has supported organisations across industries in transforming the way they plan, forecast, and report — turning complex financial data into clear, timely, and actionable insights that drive better decisions.

Our Planning & Reporting expertise helps organisations design, optimise, and implement robust financial planning and management reporting frameworks that deliver real impact: improved financial visibility, greater forecasting accuracy, and a finance function that is genuinely aligned with strategic priorities.



Scope of Services

At Centida we are committed to developing pragmatic, intelligent solutions tailored to each organisation's reality. Our Planning & Reporting expertise is structured around six interconnected services that together cover the full spectrum of financial planning and reporting transformation.

01

Planning Process Design

We help organisations design and implement a structured financial planning process covering budgeting, forecasting, and long-term strategic planning — ensuring each cycle is efficient, consistent, and aligned with business objectives.

02

Forecasting Models

Development of robust, driver-based financial forecasting models that improve accuracy, reduce cycle times, and enable scenario analysis — giving management the insight needed to act before issues materialise.

03

KPI Definition & Framework

Identification, definition, and implementation of key performance indicators aligned with strategic objectives — ensuring that what gets measured genuinely drives the behaviours and outcomes that matter.

04

BI Solutions & Power BI Implementation

Support in selecting, implementing, and optimising planning and reporting tools, with deep expertise in Power BI — transforming raw data into visual, interactive, and business-ready dashboards.

05

Management Reporting Design

Design of management reporting structures tailored to business needs and decision-making requirements — from P&L packages and variance commentary to executive dashboards and board-level reporting.

06

Process Governance

Definition and implementation of a governance framework to ensure consistent, controlled, and efficient planning and reporting processes — including roles and responsibilities, planning calendars, data ownership, and control mechanisms that ensure transparency and long-term sustainability.

Where Do We Help?

Many organisations face recurring challenges in their planning and reporting processes. These are not isolated technical problems — they are structural issues that limit finance's ability to create value. We help your organisation succeed where others struggle.

Common Challenges We Address

- **Manual work & inefficiency** — Excessive reliance on manual tasks consumes valuable time and limits the ability to produce timely, reliable insights — leaving finance teams focused on data collection rather than analysis.
- **No structured planning process** — Planning activities are often decentralised and lack a standardised methodology, leading to inconsistencies across business units and unreliable consolidated views.
- **Limited management visibility** — Executives and business leaders lack access to timely and relevant financial information to support strategic decision-making, reducing the impact of the finance function.
- **Inaccurate forecast cycles** — Forecasts based on outdated assumptions or manual spreadsheets result in unreliable projections, making it difficult to anticipate performance and react proactively to change.
- **System integration gaps** — Financial data is spread across multiple disconnected systems, creating inefficiencies, reconciliation overhead, and an elevated risk of reporting errors.

These challenges result in planning and reporting processes that are slow, unreliable, and misaligned with business needs. We support organisations in overcoming them by designing structured, scalable, and data-driven frameworks that shift finance from a reporting function to a strategic partner.

How We Make a Difference

- **Enable better decision-making** — Provide timely, standardised, and actionable financial insights that enable faster and more confident decisions across the organisation.
- **Improve forecasting accuracy** — Implement driver-based models and integrated data sources that replace static spreadsheet forecasts with dynamic, accurate projections.
- **Reduce manual effort** — Automate reporting processes and streamline data flows to eliminate manual effort and free up finance capacity for higher-value work.
- **Enhance management visibility** — Deliver clear, consistent, and business-oriented reporting and KPI frameworks that give management the visibility they need.

- **Strengthen governance** — Define roles, processes, and control mechanisms across the organisation to ensure accountability and sustainable process quality.
- **Transform finance's role** — Shift the focus from data preparation to analysis, repositioning finance as a genuine strategic business partner to the organisation.

Our Approach

Our engagement methodology follows a structured, five-phase approach designed to deliver lasting results — from a clear diagnosis of the current situation through to a fully operational and governed planning and reporting framework.

1

Phase

Assessment — Understand the Current State

KEY ACTIVITIES

- Review of current budgeting and forecasting processes
- Assessment of existing reporting structures and tools
- Analysis of financial and operational data sources
- Evaluation of planning systems and integrations
- Stakeholder interviews with finance and business leaders

DELIVERABLES

- ✓ Current state assessment report
- ✓ Gap analysis with prioritised improvement areas
- ✓ Agreed project scope and roadmap

2

Phase

Design — Build the Future Framework

KEY ACTIVITIES

- Definition of the planning framework (budget, forecast, long-term plan)
- Design of the management reporting structure
- Definition of financial and operational KPIs
- Governance model: roles, responsibilities, and decision rights
- Planning calendar and workflow design

DELIVERABLES

- ✓ Target Planning & Reporting framework
- ✓ KPI and reporting framework
- ✓ Governance model and planning calendar

3

Phase

Implementation — Build the Tools & Models

KEY ACTIVITIES

- Development of budgeting and forecasting models
- Creation of driver-based financial planning models
- Implementation of Power BI reporting dashboards
- Integration of financial and operational data sources
- Automation of reporting workflows

DELIVERABLES

- ✓ Financial planning and forecasting models
- ✓ Automated reporting dashboards
- ✓ Integrated data model

4

Phase

Testing & Validation — Ensure Reliability

KEY ACTIVITIES

- Testing of planning models and calculations
- Validation of financial assumptions and logic
- Reconciliation with existing financial data
- User acceptance testing with finance and business teams

DELIVERABLES

- ✓ Validated financial models
- ✓ Adjusted and signed-off reporting outputs
- ✓ Testing documentation

5

Phase

Training & Handover — Embed the Change

KEY ACTIVITIES

- Deployment of dashboards and planning models
- Training sessions for finance and business users
- Documentation of processes, models, and reporting structures
- Establishment of governance, ownership, and ongoing maintenance protocols

DELIVERABLES

- ✓ Fully operational planning and reporting framework
- ✓ Trained and autonomous finance team
- ✓ Complete process and model documentation

Why Centida?

Our Planning & Reporting service goes beyond traditional consulting by combining deep finance expertise with a strong focus on business impact and pragmatic execution. We are not a generalist firm that occasionally touches finance — we are finance specialists who also happen to be excellent consultants.

Real Specialisation in Finance & FP&A

Our teams bring hands-on experience from finance roles within real organisations. Our solutions are practical, relevant, and grounded in lived experience — not just theoretical frameworks.

Focus on Decision-Making & Business Value

We design every model, KPI, and report with one objective in mind: enabling better and faster decisions. Business impact is our primary measure of success.

Pragmatic Use of Technology

We leverage technology as an enabler, not an end in itself — selecting and implementing tools like Power BI that genuinely improve efficiency, integration, and usability for finance teams.

A Credible Alternative to Traditional Consulting

We provide the same rigour and structure as large consulting firms, with greater flexibility, client proximity, and a more tailored approach — without the overhead.

Deep Industry Background

Our consultants come from finance roles within real organisations across industries. We understand the pressures, constraints, and priorities that finance teams face — because we have been there ourselves.

Seamless Integration with Finance Teams

We work alongside your team, not above it. Our consultants integrate naturally into finance functions, transferring knowledge and building internal capabilities that outlast the engagement.

“We work like Finance, not like consultants”

We operate with a hands-on, results-driven mindset — integrating seamlessly with finance teams and delivering solutions that work in practice, not just on paper.