Expertise

Continuous Optimization

We help organizations stay aligned and consistent in a rapidly changing business environment

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Overview

Designing a planning and steering architecture is only the starting point. Organizations operate in a world of constant change: strategies evolve, markets shift, new business models emerge, and operational realities transform faster than annual planning cycles can absorb. A management system built for today will not automatically remain fit for tomorrow.

At Centida, we help organizations stay aligned and consistent in a rapidly changing business environment. Our Continuous Optimization service ensures that the planning models, forecasting methods, governance structures, and performance indicators an organization has put in place continue to serve their purpose over time, adapting as the business adapts, rather than becoming a source of rigidity.

Through structured review cycles and targeted interventions, we work alongside finance and management teams to identify where steering systems are drifting from business reality, and to make the adjustments that keep them effective, credible, and aligned with strategic direction.

↺ Models That Stay Relevant	↺ Sharper Forecasting	↺ Stronger Governance	↺ Faster Adaptation	↺ Long-Term Effectiveness

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Scope of Services

Continuous Optimization is not a single project with a defined end date, it is an ongoing management practice. Our service is structured around six interconnected areas that together ensure the steering system of an organization remains effective, adaptive, and aligned with business reality over time.

01

Planning Model Review & Update

We conduct structured reviews of existing planning models to assess whether their logic, assumptions, and structure remain aligned with current business reality — identifying where models have become outdated and implementing the necessary refinements to restore their accuracy and relevance.

02

Forecasting Method Improvement

We analyse the quality and reliability of forecasting processes across planning cycles, identifying recurring sources of error or bias and implementing improvements — whether through better driver definitions, revised assumptions frameworks, or enhanced scenario capabilities.

03

Governance Process Strengthening

Governance structures that are not actively maintained tend to weaken over time. We review planning and reporting governance — roles, responsibilities, review cadences, escalation paths — and reinforce the elements that have eroded, ensuring the process remains controlled and accountable.

04

KPI & Indicator Recalibration

As strategy and business context evolve, the indicators used to steer the organization must evolve with them. We review KPI frameworks to identify metrics that have lost relevance, indicators that are missing, and cascade structures that no longer reflect organizational priorities.

05

Feedback Loop Design

Many planning cycles produce outputs but generate limited learning. We design structured feedback loops that capture what each planning cycle reveals about model quality, forecast accuracy, and process effectiveness — feeding that learning back into the next cycle as a systematic improvement mechanism.

06

Change & Adaptation Management

When significant organizational or strategic changes occur — new markets, restructuring, acquisitions, strategic pivots — we support the adaptation of the steering system to the new reality, ensuring continuity of management quality through periods of transition.

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Where Do We Help?

Even well-designed planning and steering systems degrade over time. The organizations that avoid this are not those with the most sophisticated tools. They are the ones that treat optimization as an ongoing discipline rather than a one-off effort. The three challenges below are the most common patterns we observe across organizations that have invested in planning and reporting but are not getting the returns they expected.

Common Challenges We Address

01: Planning models become outdated

Planning models are built at a point in time, reflecting the business logic, cost structures, and strategic priorities of that moment. As the organization changes — new products, new markets, organizational restructuring, revised strategy — the model tends to stay behind. The result is a planning process that produces outputs based on assumptions that no longer reflect reality, quietly eroding forecast accuracy and management credibility.

The risk is that this drift happens gradually and is rarely announced. Teams adapt to working around the model rather than fixing it, and eventually the planning process becomes a compliance exercise rather than a genuine management tool. We identify where models have diverged from business reality and implement the structural updates needed to restore their value.

02: Limited feedback from planning cycles

Most planning cycles are designed to produce outputs — a budget, a forecast, a set of targets. Few are designed to generate learning. When a forecast turns out to be wrong, the typical response is to update the numbers; rarely is the root cause of the error systematically analysed and fed back into the planning process as an improvement signal.

Without a structured feedback loop, each cycle repeats the same methodological weaknesses. Forecast errors accumulate rather than diminish. The planning process does not improve with experience. We design explicit feedback mechanisms that make each planning cycle a source of institutional learning — capturing what worked, what did not, and what should change in the next cycle.

03: Processes weaken over time

Governance structures and process disciplines that are not actively maintained tend to erode. Key people leave and their knowledge goes with them. Review meetings become less rigorous. Data ownership becomes unclear. Deadlines slip. What was once a well-functioning planning and reporting cycle, gradually loses the structure and accountability that made it effective.

This is not a failure of design; it is a natural consequence of organizational change and the pressure of daily operations. The answer is not to redesign the process from scratch, but to conduct regular structured reviews that identify where governance has weakened and reinforce it before the degradation becomes critical. We provide that systematic maintenance discipline.

04: The cultural change does not follow the system change

A new planning and reporting system changes the tools and the process. It does not automatically change the mindset, the habits, or the communication patterns of the people who have to use it. This is where many transformations stall: the system is in place, but the organization does not actually steer differently.

C-level leaders often find that their intent does not translate into action at operational level. Middle management receives new dashboards but continues to make decisions the old way. Finance produces better outputs that are not acted upon. The gap is not technical, it is cultural. Closing it requires a deliberate effort to drive adoption, create genuine dialogue between leadership and the organization, and coach the change rather than simply announcing it. We support that process: helping senior leaders communicate the new steering logic in ways that resonate, building the two-way channels that make the organization feel heard, and sustaining the behavioural shift until the new way of working becomes the default.

How We Make a Difference

- **Keep planning models current —** Conduct structured reviews of model logic and assumptions, updating them as business reality evolves so the planning process remains a reliable management tool.
- **Turn cycles into learning —** Design explicit feedback loops that capture what each planning cycle reveals about model quality and forecast accuracy, feeding improvement systematically into the next cycle.
- **Maintain governance quality —** Regularly assess the health of planning and reporting governance — roles, cadences, data ownership, accountability — and reinforce what has weakened before it affects process quality.
- **Recalibrate KPIs as strategy evolves —** Review indicator frameworks to ensure that what the organization measures continues to reflect what actually drives performance under the current strategy.
- **Support continuity through change —** When significant organizational or strategic shifts occur, adapt the steering system proactively so that management quality is maintained through the transition.
- **Shift optimization from reactive to proactive —** Move the organization from fixing problems after they surface to identifying and addressing drift before it affects management credibility and decision-making quality.
- **Drive the cultural change —** Coach C-level leaders on how to get heard in the organization and how to listen back, designing two-way communication channels, sustaining adoption of the new steering logic, and ensuring the behavioural shift becomes embedded practice rather than fading after go-live.

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Our Approach

Continuous Optimization is delivered through a recurring engagement model rather than a single project. Our approach combines structured review cycles with targeted improvement initiatives — ensuring the steering system is regularly assessed, adjusted where needed, and progressively strengthened over time.

1
Phase

Baseline Assessment: Understand the Current State of the Steering System

KEY ACTIVITIES

· Review of existing planning models, forecasting methods, and governance structures
· Assessment of KPI framework relevance against current strategy
· Identification of recurring pain points and known weaknesses in planning cycles
· Interviews with finance and management stakeholders
· Benchmarking of current practices against leading standards

DELIVERABLES

✓ Steering system health assessment
✓ Prioritised list of optimization opportunities
✓ Agreed optimization roadmap

2
Phase

Optimization Design: Define What Needs to Change and How

KEY ACTIVITIES

· Detailed analysis of model logic, assumption quality, and structural gaps
· Design of feedback loop mechanisms for planning cycle learning
· Redefinition of governance roles, cadences, and accountability structures where needed
· KPI recalibration aligned to current strategic priorities
· Prioritisation of improvements by impact and implementation effort

DELIVERABLES

✓ Optimization design specifications
✓ Updated KPI and governance framework
✓ Feedback loop design

3
Phase

Implementation: Apply the Improvements

KEY ACTIVITIES

· Update of planning models and forecasting methods

· Implementation of revised governance structures and review cadences
· Deployment of feedback loop mechanisms into the planning cycle
· Adjustment of reporting outputs and management dashboards
· Alignment of teams on updated processes and responsibilities

DELIVERABLES

✓ Updated planning models and dashboards
✓ Reinforced governance framework
✓ Operational feedback loop

4
Phase

Review Cycle: Assess, Learn, Adjust

KEY ACTIVITIES

· Post-cycle review of forecast accuracy and planning process quality
· Assessment of governance adherence and process discipline
· Collection and synthesis of feedback from finance and business stakeholders
· Identification of new optimization priorities for the next cycle
· Documentation of improvements and lessons learned

DELIVERABLES

✓ Post-cycle review report
✓ Updated optimization backlog
✓ Lessons learned documentation

5
Phase

Continuous Engagement: Sustain Optimization as a Management Practice

KEY ACTIVITIES

· Regular structured health checks of the steering system
· Proactive identification of drift before it affects process quality
· Support for adaptation when significant organizational or strategic changes occur
· Ongoing knowledge transfer to build internal optimization capability
· Periodic benchmarking against evolving best practices

DELIVERABLES

✓ Steering system health reports
✓ Ongoing optimization agenda
✓ Internally capable finance and management team

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Why Centida?

Most consulting engagements end with a deliverable. Continuous Optimization begins where most engagements end. Our value in this service is not in designing a steering system once — it is in being the partner that ensures it keeps working as the organization evolves. That requires a different kind of relationship, a different mindset, and a different depth of understanding of the client's business.

🔄 Optimization as an Ongoing Discipline

We treat continuous improvement not as a project phase but as a permanent management practice — bringing the structure and discipline needed to sustain steering quality over time, not just at the point of initial implementation.

📊 Deep Knowledge of the Steering System

Because we typically build or assess the steering foundation we later optimize, we bring a depth of knowledge about model logic, governance history, and past decisions that an external reviewer could never replicate.

🎯 Focus on What Actually Degrades

We know from experience which elements of a steering system erode fastest — model assumptions, governance discipline, feedback loops — and we focus our reviews where the risk of drift is highest.

🤝 A Trusted Long-Term Partner

Continuous optimization requires a relationship of trust and genuine familiarity with the business. We work as an extension of the finance and management team, not as periodic external visitors.

⚡ Pragmatic, Low-Disruption Interventions

Our optimization interventions are designed to improve without disrupting — targeted, well-timed, and proportionate to the issue at hand, so the organization keeps running while the steering system is refined.

🏭 Industry Credibility

Our consultants come from real finance and operational roles within industrial organizations. We understand the constraints, pressures, and change fatigue that make sustained optimization difficult — and we design our engagement accordingly.

“A steering system that does not evolve will eventually steer you in the wrong direction”

We help organizations build the discipline to keep their management foundation aligned with where the business is going — not where it was when the system was designed.