WHITE PAPER

Strategy Before Technology

How Operational Clarity Unlocks the Real Value of AI - 2026



Citwell

Accelerators of transformation

Organizations racing to adopt AI often skip the necessary first step: making their operations dependable. When AI is layered onto poor processes, unreliable data, and misaligned teams, it accelerates failure rather than value. This white paper explains Citwell's proven approach—and why the step back accelerates forward.

1. Executive Summary

Every boardroom conversation today centers on artificial intelligence. CEOs feel pressure to "do something with AI." Middle management is skeptical. Technology vendors promise transformation in weeks. And operations teams quietly drown in complexity they inherited long before AI was a topic.

The inconvenient truth: technology amplifies existing behavior. Automating broken processes creates faster, cheaper broken processes. AI models trained on poor data make systematically wrong recommendations. New systems fail to stick when people lack shared definitions, decision rights, and verified baselines.

Citwell's philosophy is straightforward, and validated by decades of hands-on work with global manufacturers and industrial leaders. Before any client invests in new technology, we first invest time understanding their current operational reality: the processes, the metrics, the complexity, the people, and the organizational maturity. Only then do we help chart a technology roadmap that will actually deliver return on investment.

The sequence is non-negotiable: — People first. Process second. Technology third.

2. The Problem: The AI Rush and Its Unintended Consequences

The pressure to adopt AI is real and it is not going away. But the most common pattern playing out across industries is predictable—and costly.

How the Pattern Unfolds

- Leadership mandates "do something with AI" after a conference, a vendor pitch, or a board conversation.
- Technology partners propose rapid pilots, impressive dashboards, and compelling ROI projections.
- Operations teams—still managing workarounds, spreadsheets, and exception-heavy processes—remain skeptical.
- Implementations produce dashboards and automations that appear functional but fail to change outcomes.
- Months later, the question no one wants to answer: what did we actually get for that investment?

Why This Happens

The fundamental error is sequencing. Technology is deployed before the business conditions for its success are established. As a result:

- New ERPs and planning systems are implemented—and the business continues running on Excel.
- Workflows are automated that should have been simplified or eliminated first—encoding complexity rather than removing it.
- AI models are trained on unreliable data and produce recommendations no one trusts.
- Middle management resists: "We just invested millions in a new system. Now we're adding another layer on top?"

> *"Most people do foolish things or very minor things with AI and they don't know exactly where that could lead their own drive in the company. Before automating the complexity, let's reduce the complexity first."*
>
> **— Laurent Penard, CEO, Citwell**

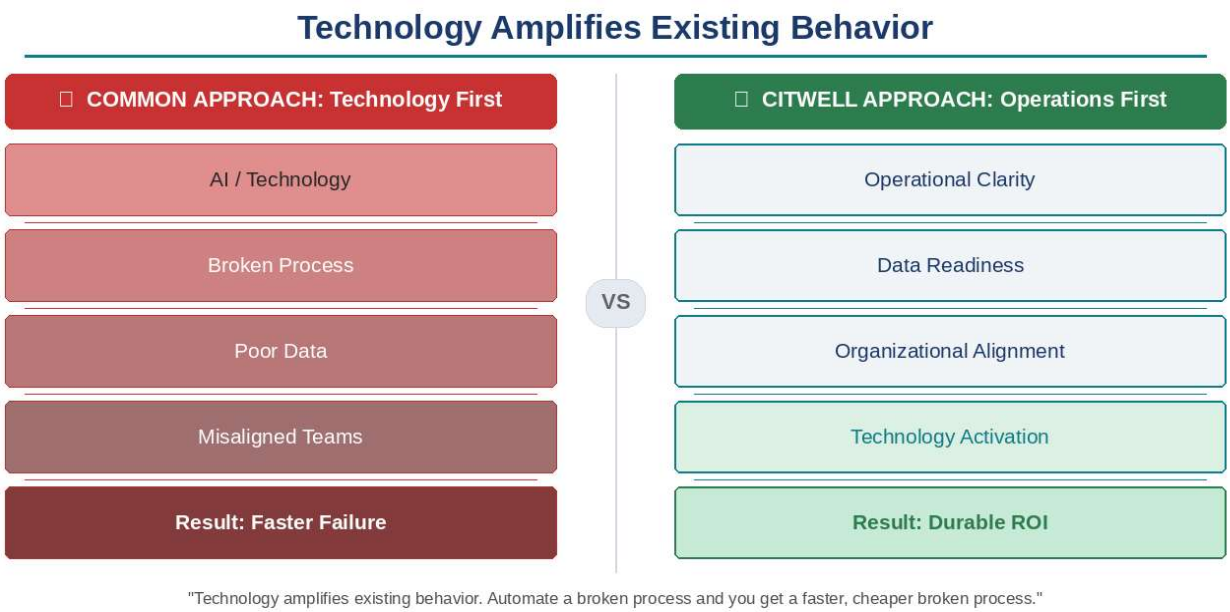


Figure 1: Technology First vs. Operations First — The Sequencing That Determines Success

3. The Citwell Hypothesis: Three Prerequisites for Lasting AI Value

Organizations that achieve genuine, durable value from AI share one characteristic: they established operational prerequisites before selecting technology. Citwell's approach is built around three non-negotiable prerequisites:

The Three Prerequisites for Lasting AI Value

1. **Operational Clarity —** Processes are mapped, exceptions are understood, root causes of complexity are diagnosed, and the current state is documented in terms all stakeholders recognize.
2. **Data Readiness —** The data required to support the intended use cases exists, is accurate, is accessible, and is sufficiently granular. Getting data right takes time—and any advisor who suggests otherwise is not being honest.
3. **Organizational Alignment —** Key stakeholders share definitions, goals, planning horizons, and decision rights. Misalignment at the organizational level cannot be solved by software.

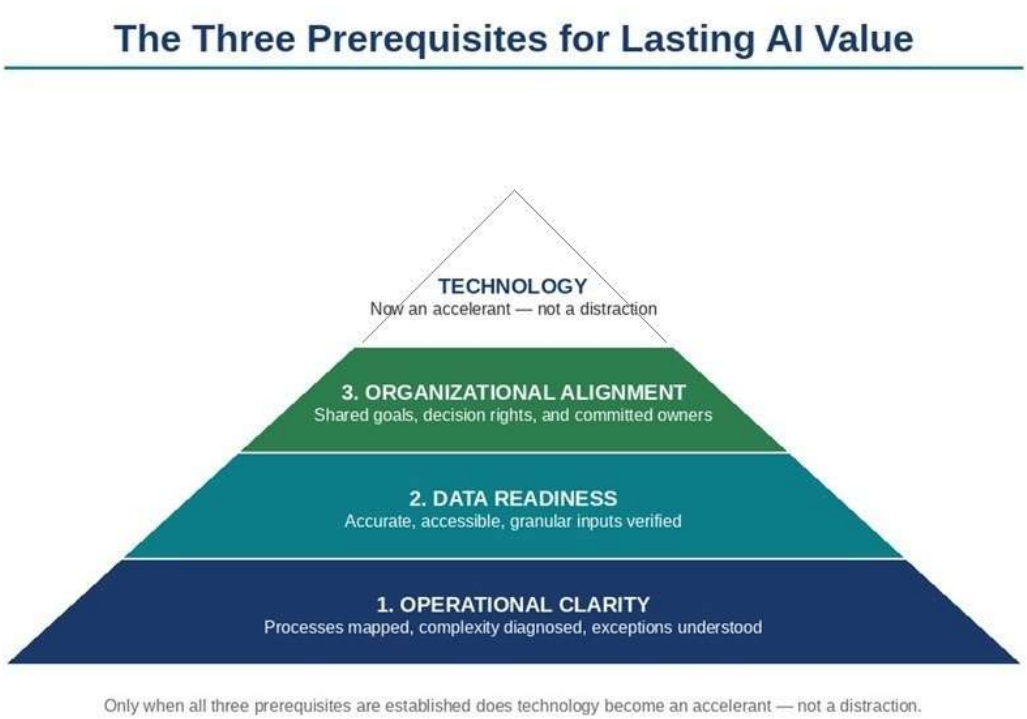


Figure 2: The Foundation Pyramid — Prerequisites That Enable Technology to Perform

Only when these three elements are in place does technology become an accelerant rather than an expensive distraction. Citwell's work is to establish these prerequisites—rapidly, rigorously, and with the operational leaders who are closest to the reality.

4. The Citwell Difference: Operations First, Technology Second

Citwell is not a technology company. We are supply chain and operations specialists who deeply understand technology's role, capabilities, and limits. That distinction matters enormously.

Large consulting firms send teams that assess, advise, and depart. Technology integrators configure systems without always understanding the business logic behind them. Software vendors optimize for feature adoption, not business outcomes. Citwell's model is different: we stay through execution, on the ground, ensuring changes stick and outcomes are measured.

The SME + TME Combination

Our operating thesis is that the most powerful combination in any digital transformation is a subject matter expert (SME) who understands the business deeply, working alongside a technology matter expert (TME) who understands what AI and modern platforms can actually deliver. Neither alone is sufficient.

Citwell provides the SME layer. We ask the right business questions. We map processes with rigor. We build alignment across stakeholders who often have competing views. Only after that foundation is established do we bring in technology partners—like B2Wise, RapidCanvas—to evaluate use cases, size ROI, and specify solutions.

> *"We come very fast from strategy to reality because we stay through the different transformation stages. We don't believe in consulting BS. We believe in realities. Somebody who is the champion of the dynasties cannot be a champion because they don't see the real effect of what they have been advising."*
>
> **— Laurent Penard, CEO, Citwell**

5. Methodology: Three Phases, Repeatable Rigor

Citwell's approach follows a consistent logic across every engagement, regardless of industry or company size. The specifics vary; the discipline does not.

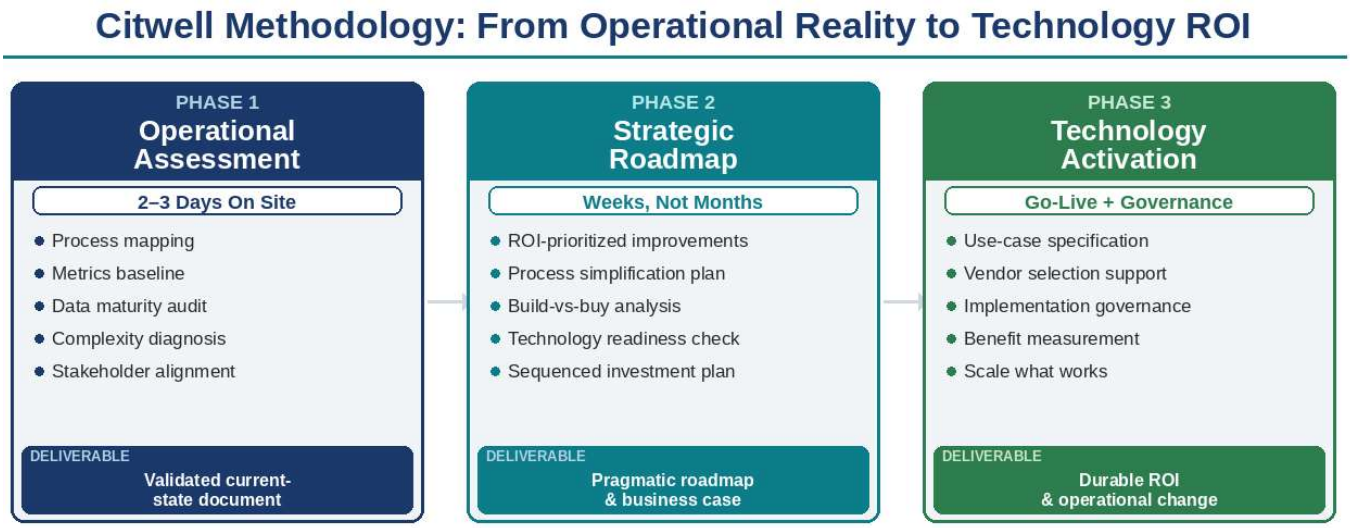


Figure 3: Citwell's Three-Phase Methodology — From Operational Reality to Technology ROI

Phase 1 — Operational Assessment (2–3 Days On Site)

A structured discovery workshop focused on understanding the current state with precision. This is not a listening tour—it is a rigorous mapping exercise across relevant operational domains.

- Process mapping: end-to-end flows across procure-to-pay, S&OP, manufacturing, inventory, or demand management.
- Metrics review and baseline establishment: What is being measured? How reliably? What critical KPIs are absent?
- Data maturity and accessibility audit: Can existing data support the use cases being considered?
- Complexity diagnosis: Where does unnecessary complexity exist, and what is its source?
- Stakeholder alignment review: Are key players operating with shared definitions, goals, and decision rights?

Deliverable: A validated current-state document and measurement baseline all participants can commit to.

Phase 2 — Strategic Roadmap (Weeks, Not Months)

With the current state established, Citwell works with leadership to define a prioritized improvement roadmap—sequenced by ROI and risk.

- Prioritized improvement list by ROI category: OPEX reduction, working capital, risk mitigation, revenue enablement.
- Process simplification and exception-reduction plans: addressing root causes before automation is applied.
- Build-vs-buy analysis: explicit ERP fit versus best-of-breed evaluation after process clarity is established.
- Technology readiness assessment and sequenced investment plan with measurable milestones.

Deliverable: A pragmatic roadmap and business case grounded in measurable current-state performance—not vendor promises.

Phase 3 — Technology Activation (Go-Live + Governance)

Only after Phases 1 and 2 are complete does Citwell engage the technology dimension directly. At this stage, clients have the three prerequisites in place: operational clarity, data readiness, and organizational alignment.

- Use-case specification and vendor selection support grounded in operational reality.
- Implementation governance: Citwell remains engaged to close the gap between strategy and results.
- Measurement plan: confirming benefits, identifying adjustments, and scaling what works.

Deliverable: A technology deployment that addresses the right problem, on the right timeline, with the right data and organizational setup.

6. Measuring Value Before You Buy

One of the most important contributions a Citwell engagement makes is establishing the measurement baseline. Organizations that have never formally measured days of inventory coverage cannot credibly claim they are reducing working capital.

Citwell mandates measurement up-front. That baseline creates accountability—and lets clients prove value before scaling. On the following page, the framework maps where value typically lives by operational priority:

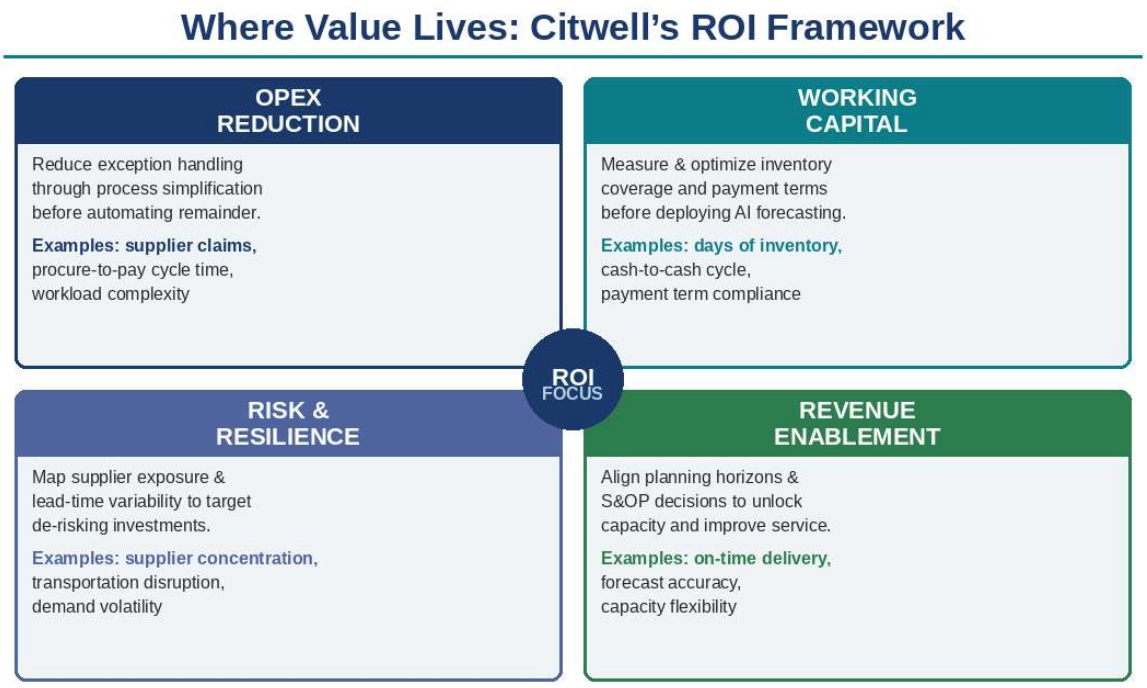


Figure 4: Citwell's ROI Framework — Every Recommendation Ties to a Measurable Financial Driver

7. Case Studies: Strategy First, Technology Second

The following examples illustrate what Citwell's approach produces in practice. Both cases involve organizations that attempted to address complex operational challenges through technology—and found that the prerequisite was getting strategy, process, and alignment right first.

CASE STUDY | Major Actor in Aerospace & Defense | S&OP Transformation

Challenge : This global leader in aerospace and defense, had struggled for years to select the right system for Sales & Operations Planning (S&OP). Operating across multiple production sites, managing numerous subcontractors, and serving customers with long-horizon contracts, their planning framework had never been formally defined. Attempts to implement planning systems had stalled repeatedly. No single source of truth existed, and stakeholders across technology centers, process leaders, and plants could not align on fundamentals: planning horizons, simulation needs, or decision ownership.

Citwell's Approach : Citwell stepped back from the technology question entirely to address the foundational issue: organizational alignment. Through approximately ten structured workshops, facilitated as a neutral third party, Citwell surfaced historical performance data to counter internal power dynamics and resolved questions the organization had never formally answered: What is the appropriate planning horizon for a business with 3–4 supply chain nodes, each requiring 4–5 months to adjust capacity? Who owns which decision? How are conflicting signals resolved

Outcome : After ten workshops, all key stakeholders reached full alignment on the S&OP framework, planning horizons, and decision rights. The client moved forward confidently with a proof-of-concept in SAP IBP—knowing exactly what the system needed to deliver. Technology investment was now targeted, justified, and positioned for success where prior efforts had failed.

CASE STUDY | Rossignol | Consumer Goods | ERP Implementation Governance

Challenge : Rossignol (named after the nightingale—le rossignol in French) is a globally recognized manufacturer of ski and outdoor equipment. Two years into a major ERP implementation, every business unit—ski-making, apparel, accessories—was pushing for maximum requirements without clear prioritization. This threatened to blow up costs, derail timelines, and produce a system no one could afford to configure properly. The CIO needed an independent orchestrator who understood both the business and the technology landscape.

Citwell's Approach : Citwell was engaged to bring discipline to the requirements process. We facilitated structured workshops across all business lines, helping each owner distinguish between what they wanted and what Rossignol's future business truly needed. The output was a prioritized, rated requirements framework balancing ambition against strategic reality—and that all stakeholders could commit to. The CIO later noted that achieving this alignment internally, without an independent facilitator, would have been impossible.

Outcome : The ERP implementation proceeded on a defined, defensible scope with stakeholder commitment and clear governance. The CIO noted: "It is incredible how you handled that very well with all my business partners—I could not have achieved that by myself." One year later, Rossignol's VP of Strategic PMO & Business Transformation offered his own formal reflection on the engagement.

CLIENT VOICE | ROSSIGNOL — PEAC PROJECT, DECEMBER 2025

"Citwell brought a lot of pedagogy and sought to embark as many people as possible without leaving some on the sidewalk. A special thank you to the project team for their dedication, collaboration, and professionalism. They demonstrated strong ability to work together, overcome challenges, and maintain needed agility with impressive project management skills. I look forward to seeing the transformation roadmap that we developed together being implemented in the coming 2 years. Thank you Citwell for your dedication and professionalism."

— Wajdi Mattar / VP Strategic PMO & Business Transformation, Rossignol

8. Five Immediate Actions for Leaders

Regardless of where your organization is in its AI or digital transformation journey, five actions create the operational foundation that makes technology investment pay off. These are not multi-year programs—they can begin this quarter.

#	Action	What It Means
1	**Pause and Map**	Before buying AI, run a 2–3 day discovery to map the process you plan to automate. Understand root causes before selecting solutions.
2	**Baseline Measurement**	Record current KPIs now—forecast accuracy, exceptions per transaction, days of inventory, on-time delivery—so improvements can be demonstrated and credited.
3	**Reduce Exceptions First**	Eliminate avoidable complexity before automating what remains. Automation applied to a simplified process delivers far greater ROI.
4	**Decide Platform Strategy**	Explicitly evaluate ERP fit versus best-of-breed after you have process clarity. This is a strategic choice, not a default.
5	**Govern Outcomes**	Assign accountable owners and commit to a measurement cadence through implementation. Strategy without governance is a slide deck.

9. A Note for Private Equity Sponsors

PE timelines create pressure for visible initiatives—and technology is attractive precisely because it is visible. But technology deployed without operational diagnostics often fails to deliver within the hold period. The cost of implementing a new ERP or planning system, combined with the time required to stabilize and realize benefits, frequently exceeds the investment horizon.

Citwell helps PE sponsors and portfolio teams quickly identify the highest-leverage operational gaps, sequence interventions for measurable near-term impact, and ensure technology is applied where it accelerates sustainable value creation. Our discovery process—completed in days, not months—gives management teams and boards confidence that transformation investments are sequenced correctly and tied to the financial metrics that matter most: OPEX, working capital, and risk.

The most productive early-hold question is not "What technology should we deploy?" It is: "Where are the operational metrics underperforming relative to benchmark, and what is the root cause?" Citwell answers that question rapidly and translates the answer into a phased, ROI-sequenced action plan.

10. Why Citwell

We Stay Through the Transformation

Most advisors advise and leave. Citwell stays. We follow our clients through implementation, navigating the gap between the strategy that was designed and the operational reality that emerges. That sustained presence is what distinguishes genuine insight from consulting theory.

We Are Operational Specialists, Not Generalists

Our practitioners come from supply chain, manufacturing, procurement, and operations—not from IT consulting or software sales. Depth is what produces actionable insight. Breadth without depth is a slide deck.

We Are Honest About What Technology Cannot Do

AI cannot compensate for unreliable data. A planning system cannot substitute for organizational alignment. An ERP cannot solve a process design problem. Citwell tells clients these things before they invest—not after. That honesty builds the trust that makes long-term relationships possible.

Faster Time-to-Value

Our discovery workshops deliver actionable insight in days. Clients leave Phase 1 with a validated current-state assessment and a clear view of where technology investment is warranted—and where it is not.

End-to-End Partnership

From strategy through deployment and beyond, supported by international teams across North America, France, and the UK. We do not hand off after the strategy phase—because the gap between strategy and operational reality is precisely where transformations fail.

Conclusion: The Step Back That Accelerates Forward

AI and modern systems will reshape competition. The winners will not be the organizations that adopt technology fastest—they will be the organizations that adopt it on a foundation that allows it to perform: people aligned, processes simplified, data reliable.

That step back accelerates forward. It prevents the expensive rework of poorly sequenced technology deployments. It ensures automation serves the business rather than encoding its dysfunction. And it produces measurement baselines that let organizations prove, scale, and credit the value that technology was always supposed to deliver.

Citwell helps clients make that step—rapidly, rigorously, and with the operational leaders who are closest to the reality of the business.

The wave of AI transformation is coming. The question is not whether to engage with it. It is whether you step back first to ensure you are ready for it.

Contributors

Scott STAUNTON
AI Growth Advisor RapidCanvas

Laurent PENARD
Group Managing Director and USA CEO

Citwell

Let's keep in touch!

Citwell.com/us

Ready to build the foundation before you build the tower?

Contact **Laurent Penard, Citwell CEO**, to schedule a discovery discussion or a 2 to 3-day on-site workshop focused on your supply chain, sales, and operating model priorities for 2026.



Laurent Penard - CEO
laurent.penard@citwell.com
+1 617 301 2742