

# IBM Future Forum

## Achieving excellence in Financial Planning and Why Good Data Matters

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# **Customer Panel: Real-life Customer journeys - achieving excellence in Financial Planning and Why Good Data Matters?**



**Raj Dadra**  
Former Chief  
Financial Officer  
**VCCP**



**Simon Short**  
Chief Data Officer  
**IMI Precision Engineering**



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Industry Lead: Retail, FS,  
and Professional Services  
**Sempre Analytics**



# 1. Data Quality and Ownership Come First

**Insight:** Accurate planning is impossible without accurate data.

Planning challenges often start with unclear data ownership and definitions. Without accountability, finance spends time fixing and reconciling instead of planning.

*“Most planning challenges don’t start in the model. They start much earlier, when nobody truly owns the data or feels accountable when it’s wrong.”*

**Raj Dadra, Former Group CFO, VCCP**



## 2. Integration and Governance Keep Numbers Aligned

**Insight:** Finance systems perform best when data is clean, governed, and consistently structured.

As data spreads across systems, weak integration and poor governance create inconsistencies. Strong structures and clear ownership build confidence in outputs.

*"Poor data quality in one system doesn't stay contained. Once it starts flowing into other systems, especially with automation or AI, the problem multiplies very quickly."*

**Simon Short, Chief Data Officer, IMI Precision Engineering**



# 3. Change and Adoption Matter as Much as Design

**Insight:** Transformations succeed through clarity, shared goals, and engaged people.

Even the best solution fails without user buy-in. Early involvement, clear communication, and internal champions drive successful adoption.

*"You need a champion in the business. Someone senior who can articulate the vision and keep driving it forward when priorities shift."*

**Raj Dadra, Former Group CFO, VCCP**



## 4. Iterative Delivery Builds Trust and Momentum

**Insight:** Small improvements in data quality often deliver the biggest gains.

Delivering value early through MVPs and transparent updates keeps stakeholders engaged and builds trust. Silence kills momentum—overshare progress instead.

*“MVPs matter, but only when they’re part of a clear roadmap. Speed without direction doesn’t build confidence.”*

**Raj Dadra, Former Group CFO, VCCP**



# 5. Strategic Alignment Turns Planning Into Impact

**Insight:** When Finance shapes data strategy, planning becomes a strategic advantage.

Tie EPM initiatives to real business objectives with measurable outcomes and executive sponsorship.  
This ensures planning drives decisions, not just reports.

*"The most successful initiatives were the ones tied to real business outcomes, not just technical improvements."*  
**Simon Short, Chief Data Officer, IMI Precision Engineering**

# Sempre are the only consultancy that truly bridge Finance and Data



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Financial Planning  
Operational Planning  
Consolidation  
Scenario Analysis and Reporting

Data Integration & Platforms  
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Intelligent Automation

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