

The AI Reality Check

How to Be a Data Hero in a
"Garbage In, Magic Out" World



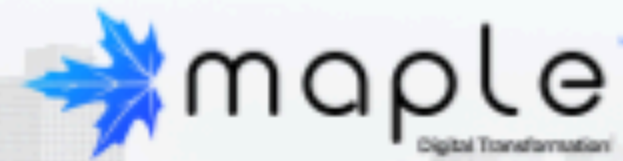
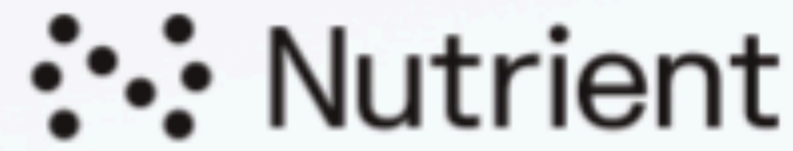
Mike Rogan

Founder, Wayfinder • Ex-Salesforce • Data + AI Readiness

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Dreamin' in Data



About me:

20+ years of being a data nerd

- Salesforce consultant, customer, alum
- In the Salesforce ecosystem since 2009
- Working with data since 2000
- Focused on data/integrations/AI readiness
- Specializing in regulated industries



Mike Rogan
Founder, Wayfinder



Two Truths. One Uncomfortable Gap.

TRUTH #1

Your executive just approved an AI initiative. (mandate?)

The roadmap is set. The budget is real. The expectations are...ambitious.



VS

TRUTH #2

Your data hasn't been audited since the before times.

Years of inherited debt. Broken syncs. Ghost records.



The gap between those two truths? That's where data heroes are made.

Reality Check: Are Demos Magic?

WHAT THE DEMOS SHOW

- ✓ AI surfaces perfect next steps
- ✓ Forecasts that predict with eerie accuracy
- ✓ Agents that "just know" what to do
- ✓ Real-time insights from a single source of truth

WHAT'S ACTUALLY UNDER THE HOOD

- ⚠ Carefully curated demo org with clean data
- ⚠ Hand-picked fields that are perfectly populated
- ⚠ No legacy migration artifacts. No dupes.
- ⚠ Screens that don't look like your org

I've built Dreamforce keynote demos. I know what's behind the curtain. It's not your reality.

The Data Swamp of Inherited Debt



The data hero doesn't clean data because it's glamorous. They do it because it's what makes AI possible.

5-7

Systems of record
per mid-market company

0

That fully agree
on what a record means

Years

Of 'just sync it'
integrations underneath

Data heroes don't wait for AI to expose the mess. They fix it first. That's what this session teaches you to do.

Meet the "AI Killers"

These three patterns kill AI initiatives before a single prompt is written.



Ghost Records

Duplicate contacts. Merged accounts gone wrong. Orphaned records.

AI can't distinguish a ghost signal from a real one — it trains on everything.



Logic Conflicts

"Closed Won" in SFDC \neq "Revenue Recognized" in SAP.

Field definitions that mean different things across different systems.

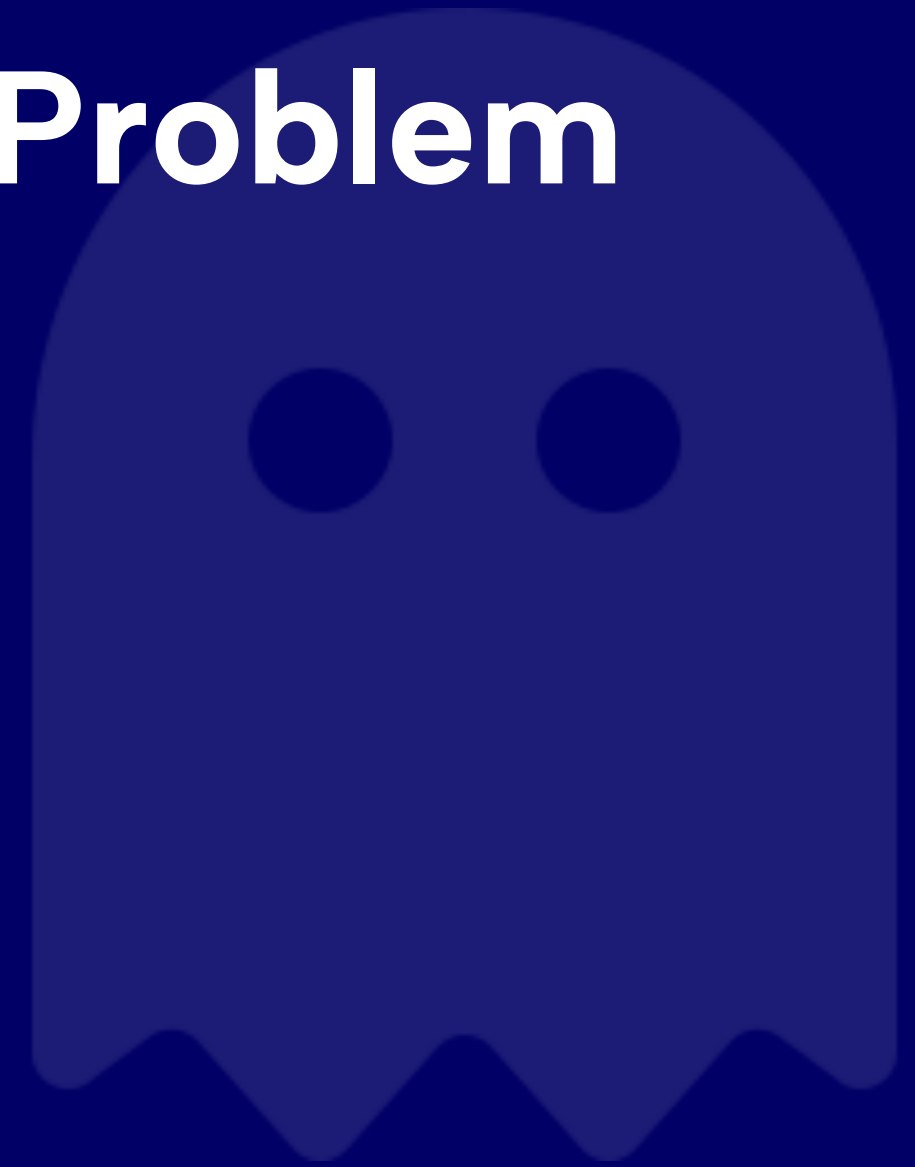


Silent Sync Failures

The integration status shows green. The data says otherwise.

Suspect records flowing confidently into your AI pipeline.

Ghost Records: The Zombie Data Problem



What it is:

Duplicate contacts. Merged accounts with orphaned children.
Contacts migrated from a prior CRM no one uses anymore.

Why AI fails:

Models don't know a ghost record from a real signal. They train on volume and pattern — and your ghosts look just as real as your best customers.

The tell:

Your AI recommends re-engaging a "high-value prospect" who churned 3 years ago, was merged into a duplicate, and never actually existed as entered.



Rule of thumb: If your CRM has been live for 5+ years without a deduplication project, assume 15–30% ghost pollution.

Logic Conflicts & The Broken Handshake

Salesforce says...

Closed Won

Opportunity Stage

SAP says...



Pending Invoice

Revenue Recognition

AI sees "Closed Won" as revenue signal. Finance knows it isn't. The model is missing context.

Silent Sync Failures

Integration status: ✓ All systems syncing normally

Data reality: Last successful full sync was 11 days ago. 40% of records are suspect. Nobody knows because no one got an alert.

The AI Readiness Heatmap

The data hero's first move: Grade every system before a single prompt is written.

System / Source	Complete?	Consistent?	Fresh?	Owner?	Integration Fidelity
CRM (Salesforce)	●	●	●	●	●
ERP / Finance	●	●	●	●	●
Marketing Automation Platform	●	●	●	●	●
Data Platform	●	●	●	●	●

● = Strong (AI-ready)

● = Needs Attention

● = High Risk (fix before pilot)

Every red cell is a hallucination waiting to happen.

Avoid preventable hallucinations.

The "POC → Disaster" Checklist

The data hero's pre-flight checklist. 10 questions. No pilot launches without them.

- 1 Where does this data actually come from — and when was it last validated?
- 2 Who owns this data domain, and do they know AI is consuming it?
- 3 What happens to the AI output if this field is null 30% of the time?
- 4 Does "Closed Won" mean the same thing in every system feeding this model?
- 5 Can I trace a single record from source to AI output right now?
- 6 What's the deduplication strategy — and when did it last run?
- 7 Are there any active data migrations or schema changes in progress?
- 8 What's the freshness SLA on the integration feeding this use case?
- 9 What does "failure" look like — and who gets alerted?
- 10 Would we be comfortable if an executive saw this AI output tomorrow?

Data heroes ask these questions first. Everyone else asks them at the post-mortem.



The Stress Test in Practice

3 steps a data hero takes before anyone writes a prompt. Right now. Pick your top AI priority.

1

Name the Use Case

Pick one AI initiative on your current roadmap. Not the whole strategy — one specific thing.

2

Trace the Data Lineage

Where does the data come from? Walk it back upstream. Every system it touches. Every handoff.

3

Find the First Failure Point

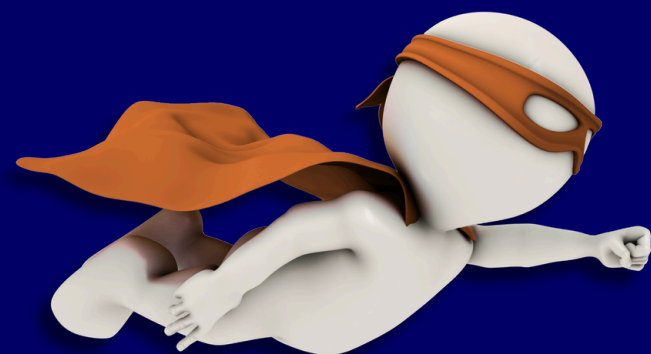
Where does the chain break? That's your Day 1 fix. Not the whole swamp — the first leak.

REMEMBER: Data heroes don't boil the ocean. They find the first leak and fix it.

Stop Speaking Jargon. Start Speaking Risk.

The data hero's superpower: translating technical risk into business consequence.

What You See (Technical Risk)	→	What the Business Hears (Consequence)
Duplicate / ghost records in CRM	→	AI targets the wrong accounts; pipeline inflates; quota attainment is fiction
Broken CRM → ERP sync	→	Forecast model trains on stale data; the board sees numbers that no longer reflect reality
No defined data owner for a field	→	When the model hallucinates, no one is accountable—and no one sees it coming



This is how a data hero gets a seat at the table — before the pilot fails, not after.

The Data Social Contract Framework

The data hero establishes this before anyone writes a prompt. Not a governance doc — a handshake with consequences.



Ownership

Who created this field or record?

Every data domain needs a named human who is the owner.



Definition

What does this field actually mean?

Written down. Agreed upon. The same answer in every system.



Accountability

Who is responsible when it breaks?

"The integration team" is not an answer. A name is an answer.

**A data hero doesn't just ask the hard questions. They document the answers.
That 'No' is the 'Yes' that makes production work.**

You are not the bottleneck.

You are the HERO.



- ⚠️ Every AI failure has a data story at its root.
- 🛡️ The practitioner who raises hard questions isn't blocking AI — they're protecting the investment.
- ★ Fixing data foundations isn't janitorial work. It's a high-value act in the AI era.

Five Hero Moves

1

Pick one AI use case on your roadmap

Not the strategy. One use case.

2

Run the Heatmap on its primary data sources

Completeness · Consistency · Freshness · Ownership · Fidelity

3

Answer all 10 checklist questions before anyone writes a prompt

If you can't answer them, that's your first deliverable.

4

Name a data owner for each domain involved

A person. Not a team. Not a ticket. A name.

5

Share what you find — the conversation is the deliverable

You don't have to fix it all. You have to surface it.

The magic show is still happening. The data hero is the one who knows where the trapdoor is.

The magic show is still happening. You just know where the trapdoor is now.



AI Readiness Heatmap

Grade your stack before the pilot.



POC → Disaster Checklist

10 questions. No excuses.



Data Social Contract

Ownership · Definition ·
Accountability



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Q&A

