

Trusted Data for Trusted AI

Simon Wise // Data8 Limited

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I help turn shelfware into software people actually use. “It works on my machine” is not a deployment strategy – it’s a personality.

Focus

Dynamics 365 and the
Power Platform

Awards

Microsoft MCP

Connect



45-minute session flow

PLAN

01

The problem

Why CRM data quality becomes an AI risk when it is invisible or unmeasured.

02

The framework

A practical model: validate, de-duplicate, enrich, score, govern.

03

The technical view

How this fits Dataverse, model-driven apps, Power BI and automation.

04

Solution demos

Validation, Duplicare, Data Integrity and dashboard hand-offs.

05

Takeaways

A checklist for making Dynamics 365 data AI-ready.

Aims and Outcomes

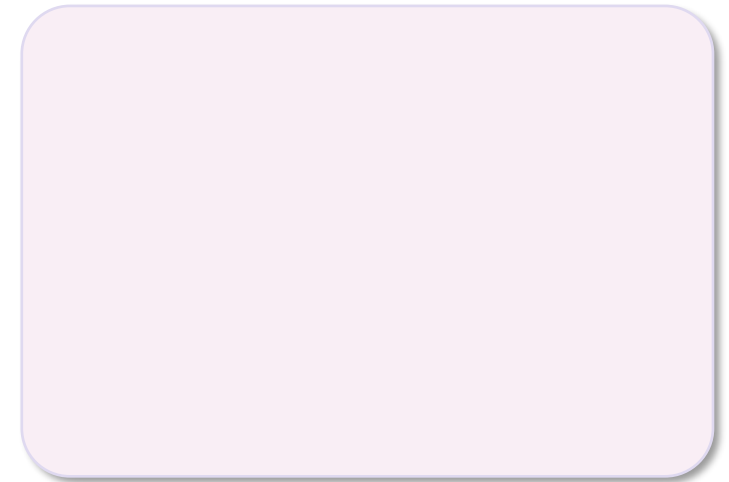
The aim is not to sell AI. The aim is to show how Dynamics data becomes safe enough to use with AI.

Why trusted CRM data matters now

AI experiences increasingly depend on business data, relationships and process context.

- ◆ Copilot and agents need reliable business context, not just access to records.
- ◆ AI can summarise, recommend and automate only from the signals CRM provides.
- ◆ Poor-quality CRM data becomes poor-quality AI context.
- ◆ Data quality must move from occasional clean-up to continuous readiness.

AI readiness is a Dataverse data design, governance and user-behaviour problem.



What does trusted data mean for AI?

◆ **Complete** – Critical fields and relationships exist for the scenario.

◆ **Valid** – Email, phone, address and key values pass defined checks.

◆ **Unique** – Duplicate records can fragment the customer picture.

◆ **Current** – Activity, ownership and lifecycle dates still reflect reality.

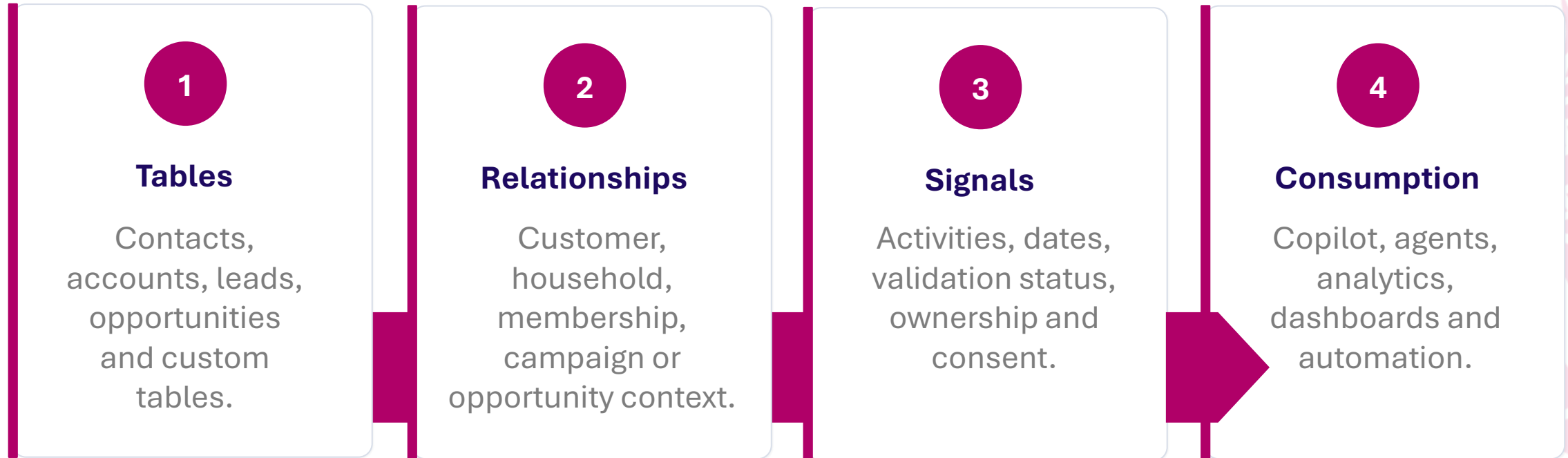
◆ **Consistent** – Users follow the same standards across teams and tables.

◆ **Explainable** – Scores, rules and remediation actions are visible.

**Trusted AI needs more than “the field is mandatory”.
It needs evidence that the record is usable.**

Dynamics 365 technical lens

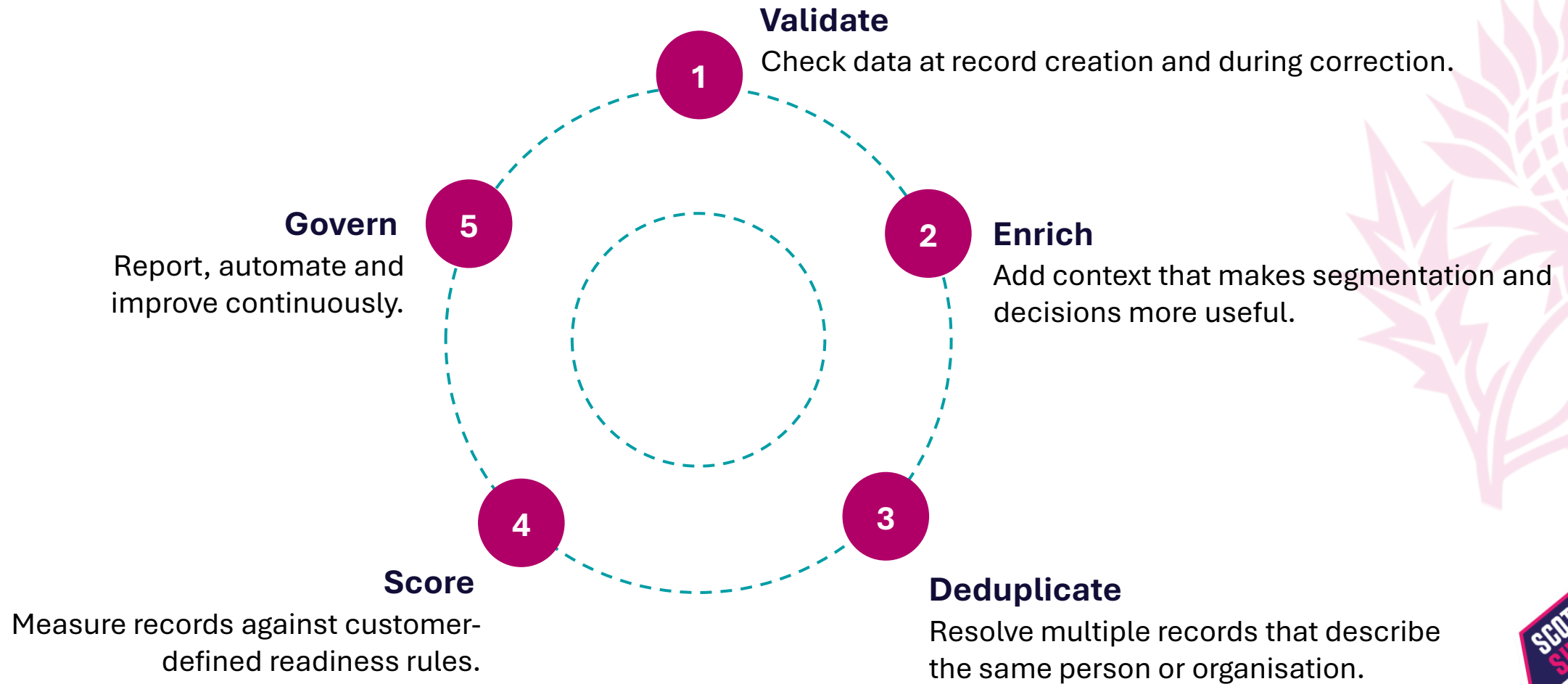
In Dataverse, AI context is built from tables, relationships, permissions, search and business process signals.



➤ **Technical principle: make the quality signal a first-class Dataverse data point, not a spreadsheet outside CRM.**

Data8 AI-ready data loop

The loop is designed to prevent bad data entering CRM, repair existing data, enrich context, and make readiness measurable.





Where each Data8 capability fits

Validation services

Email, phone and address validation to improve data at capture when records are corrected.

Business Insights

Add useful context to improve segmentation, prioritisation and reporting.

Duplicare

Duplicate detection, prevention and controlled resolution to support a single customer view.

Data8 Data Integrity

Rules, scoring, next-best-action guidance, trends and governance inside Dynamics 365.

Together, these capabilities support the complete AI-readiness cycle.

The technical value is the combination: quality rules plus validation, duplicate detection, enrichment, dashboards and automation.



Verification and enrichment

VALIDATION

- ◆ **Point-of-capture validation** – Stop obvious data quality issues before they enter Dataverse.
- ◆ **Ongoing correction** – Use validation during remediation so fixed data is genuinely usable.

ENRICHMENT

- ◆ **Fill the gaps** – Add the context records are missing.
- ◆ **Segment with confidence** – Consistent attributes mean segments hold up across teams and tables.

**Better inputs,
better context**

**Technical pattern: store
validated and enriched signals
where Dynamics users,
dashboards and AI experiences
can act on them.**

[LIVE DEMO](#)

Trusted AI needs identity confidence

**Duplicate data is not just a housekeeping issue.
It fragments the customer facts that AI and analytics rely on.**

Contact A

Contact B

Lead A



**Duplicate
review and resolve**



**Single, trusted
customer view**

Why it matters

Summaries, segmentation and decisions need one version of the customer.

What is the process

Potential duplicates surfaced in CRM, reviewed, and safely resolved.

AI tie-in

Cleaner identity means less conflicting customer context.

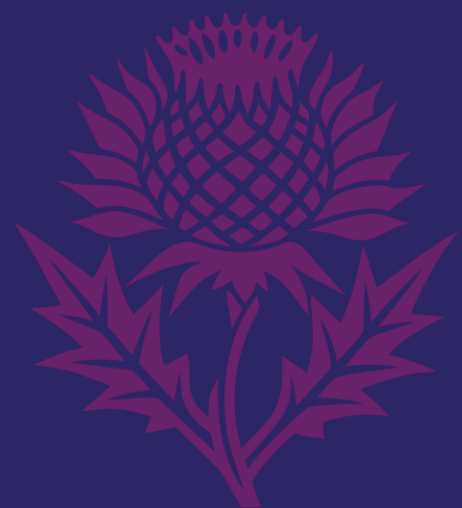
LIVE DEMO



“Before we think about AI outputs, consider the quality of the CRM inputs.”

Record-level AI readiness score // [LIVE DEMO](#)

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Dashboard and workflow hand-off

Record-level quality management visibility and operational action.

Power BI dashboard

Readiness trend, low-scoring records and team-level focus areas.

Record drill-through

Records that need attention displayed directly from the operational view.

Power Automate

Score changes can trigger Teams messages, tasks or follow-up emails.

AI readiness question

Which CRM records and fields would your AI use cases depend on?

Data quality programs have an owner, a metric and a feedback loop.

LIVE DEMO

Reference architecture: Dynamics data to AI outcome

Dynamics 365 and the Data8 quality layer

- ◆ Dataverse holds operational records, relationships and the security model.
- ◆ The Data8 quality layer adds Validation, Duplicare, Enrichment and Data Integrity scoring.

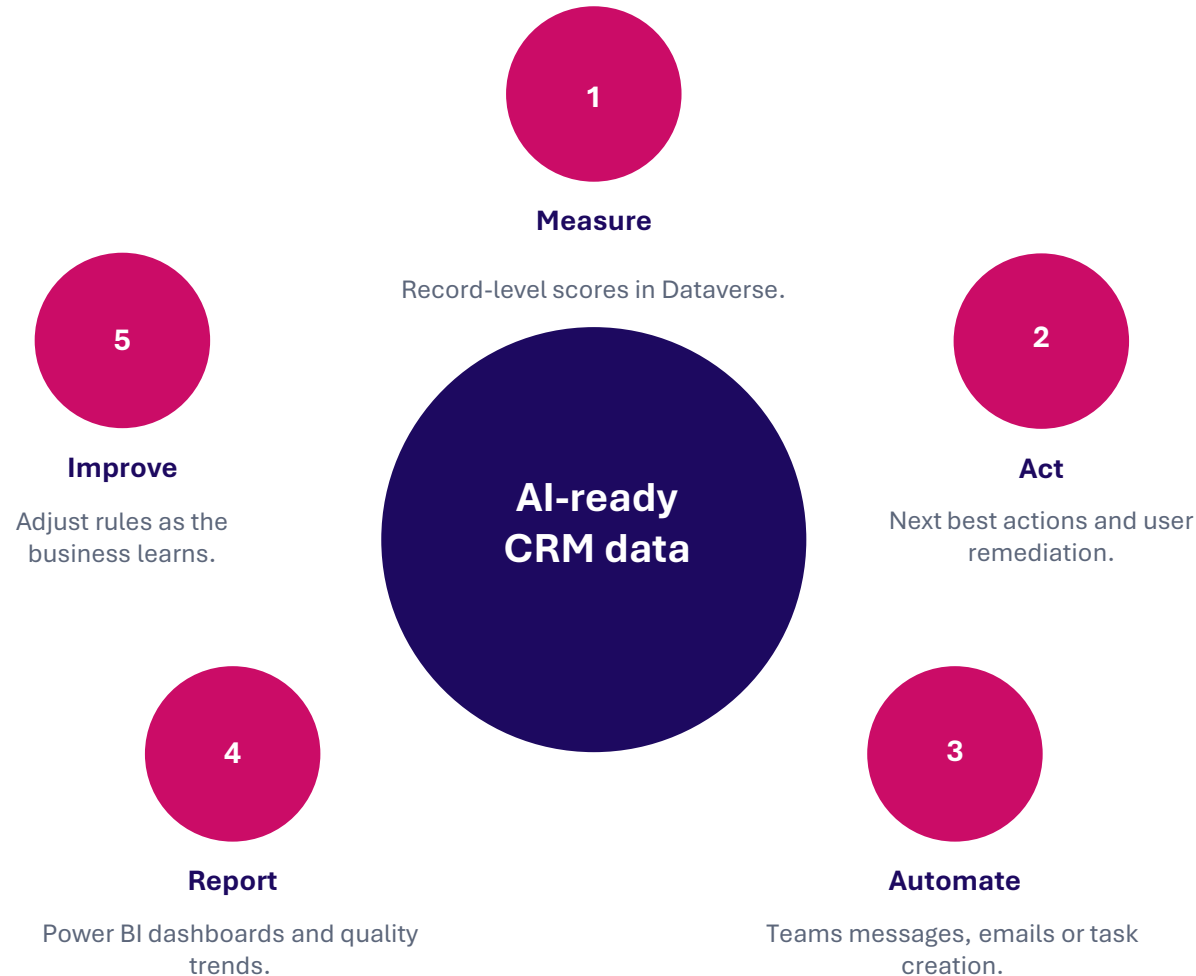
Governance and AI consumption

- ◆ Power BI dashboards, Power Automate alerts and improvement tracking.
- ◆ Copilot, agents, predictive analysis and automated journeys consume the trusted data.

The quality layer sits before AI consumption, but remains operational inside Dynamics.

Governance model: measure, act, improve

AI readiness is not a status you achieve once. It is an operating rhythm.



Technical checklist: making Dynamics data AI-ready

Data model and data quality

- ◆ Which tables and relationships will AI use?
- ◆ Which fields are critical to trustworthy output?
- ◆ How do we prove values are valid, not just present?
- ◆ Where do duplicates distort the customer picture?

Operational governance

- ◆ Which scores should persist in Dataverse?
- ◆ Which users should see next best actions?
- ◆ What dashboards show readiness over time?
- ◆ Which automations should trigger when scores change?

If you cannot answer these questions, your AI use-case is carrying hidden data risk.

AI readiness starts with trusted CRM data

The practical message for Dynamics 365 admins and teams:

Make data quality visible inside CRM.

Validate, de-duplicate and enrich the records AI relies on.

Score and govern readiness in Dataverse.

Keep improving with dashboards and automation.



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Prize draw will be held at the Cabaret with winners contacted after the event.



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Feedback wins Prizes!

Session Feedback

