

2026  
**DYNAMICS  
CON**

**Why Your AI Project Will fail  
&  
How to Fix it Before it Does**

**Mary Myers | WorldMax**

# Meet Mary

MVP | WorldMax

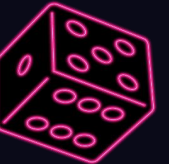


- 7 x DynamicsCon Live Speaker
- TechFluent Instructor/Mentor
- End User to Business Owner
- Single mom with the world's best Intern
- Professional Golfer\*



**AI investment is skyrocketing.**  
**Failure rates are too.**

Most failures are not technical problems.  
They are people, process, and planning problems.





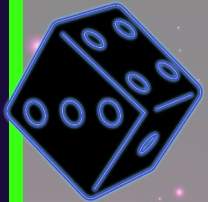
**5 pitfalls.**  
**Real fixes.**  
**What good looks like.**





# No Clear Plan

Pitfall #1

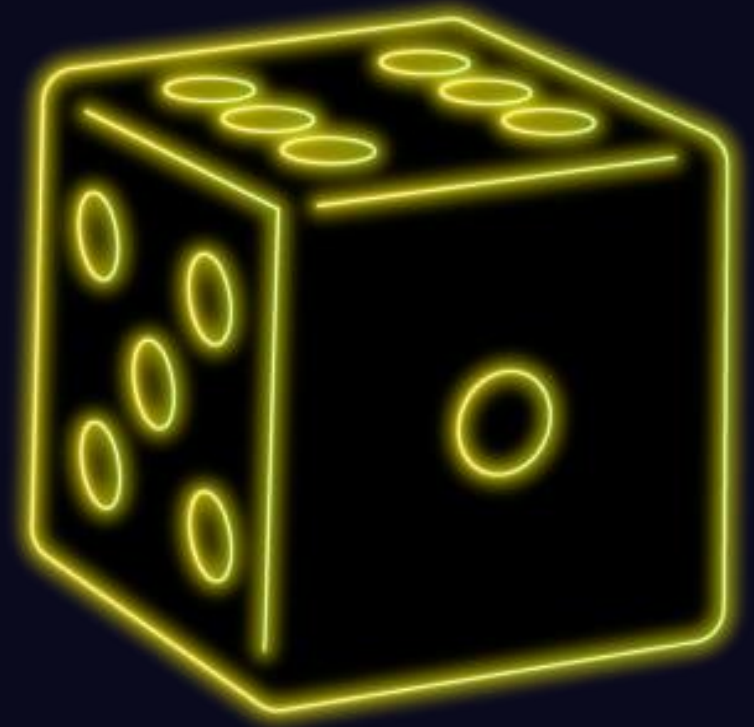


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# THE PROBLEM: No Clear Plan

- ▶ Tool chosen before the problem is defined
- ▶ No owner. No success criteria. No accountability.
- ▶ Tech is exciting. Process mapping is not.
- ▶ Result: project drifts, stalls, or succeeds technically and delivers zero business value.



# FIX: Map Your Processes First

## Process mapping IS the plan.

- ▶ Understand what you want out of EACH process
- ▶ Where does AI add real value?
- ▶ Where does it just add complexity?

Define what “done” and “good” look like before you build a single thing.



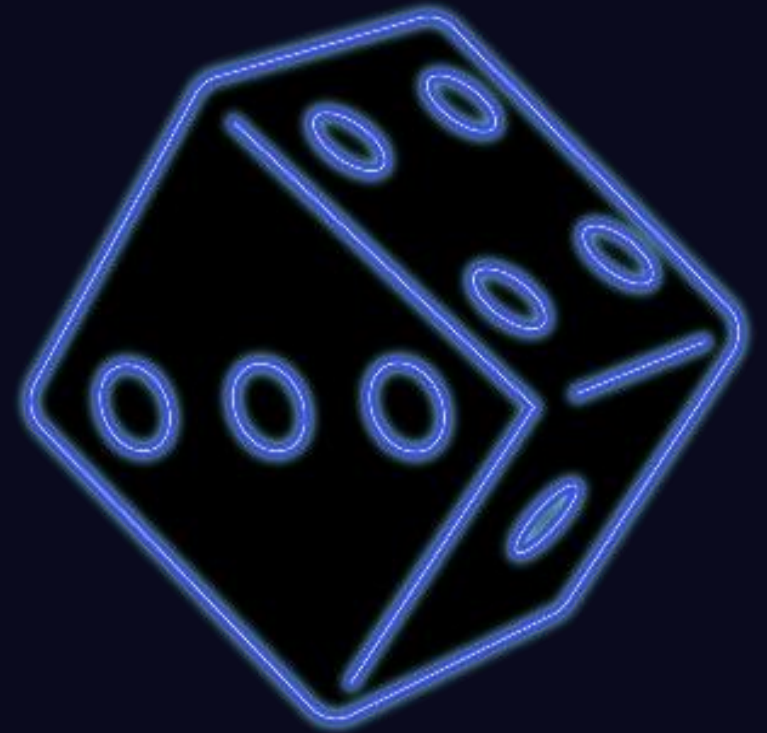
# FIX: Planner + Ownership

## Process map → Action list → Owner

- ▶ Use Power Apps Planner to assign tasks, owners, deadlines
- ▶ Every task needs a name attached to it

**No owner = no accountability**

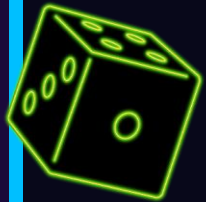
**No accountability = quiet project death**





# PITFALL #2

Messy Data



# THE PROBLEM: Messy Data

- ▶ AI is only as good as the data it works with
- ▶ Duplicate records, inconsistent formats, siloed systems

## The hidden problem:

**Not enough data is being collected —  
because collecting it is a pain.**



# FIX: Automate Data Collection

## Remove the friction.

- ▶ If collecting data is painful, it won't happen consistently
- ▶ Automation enforces structure at the point of entry
- ▶ Consistent schema = data LLMs can actually understand and reason over

Bad data is a process design problem,  
not a people problem.

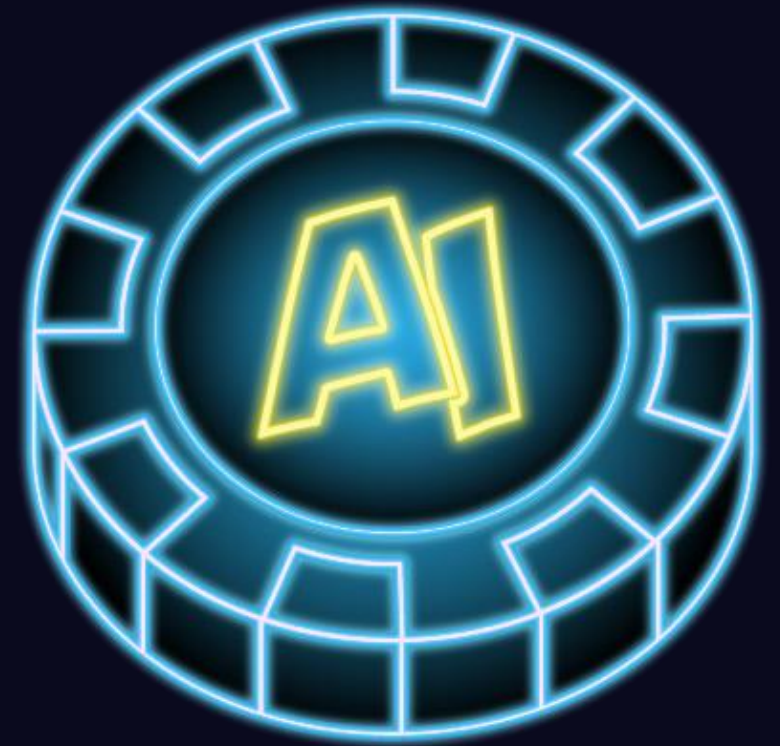


# FIX: Dataverse as Your Clean Layer

- ▶ Built-in schema enforcement
- ▶ Native integration with Power Platform and Copilot
- ▶ Single source of truth across your AI solutions

**Data quality is a prerequisite.**

**Not an afterthought.**





# PITFALL #3

**Unrealistic Expectations & Lack of Expertise**

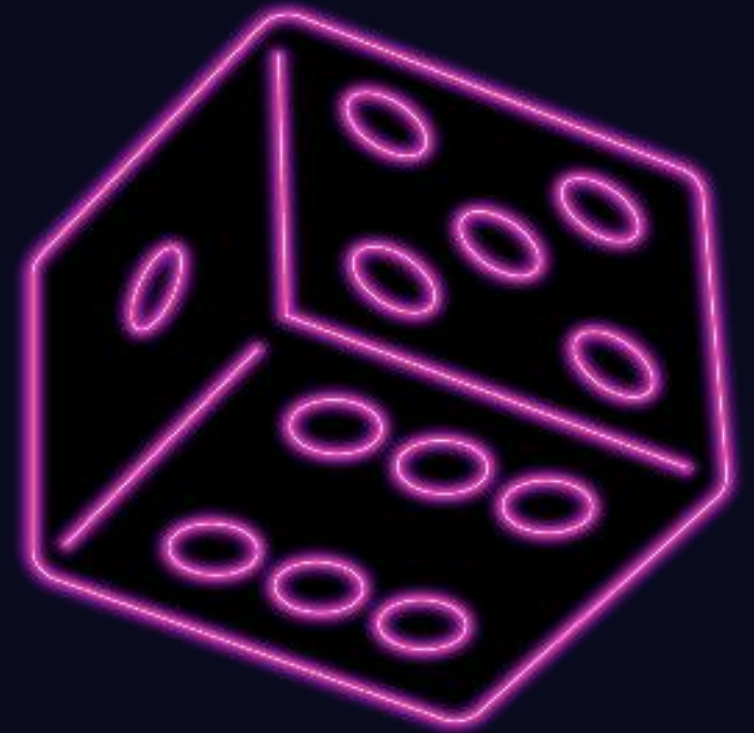


# THE PROBLEM: You Don't Know What You Don't Know

- ▶ Leadership expects magic. Teams expect perfection.
- ▶ The plan exists — but it's the wrong plan
- ▶ Built by people who couldn't know better

**Over-promise early.**

**Under-deliver at go-live.**



## FIX: Define Success Per Process

- ▶ Map processes AND define what “good” means for each one
- ▶ What does “done” look like — for the business, not just technically?
- ▶ Run a small proof of concept before committing to full scope

Expertise is what closes the gap between what you think AI will do and what it actually does.



# FIX: Internal Operational Experts

**The people who live in the process every day.**

- ▶ They know where the REAL pain is
- ▶ Management's view of the process is often incomplete
- ▶ Bring them in before decisions are made, not after

**They have information your AI project cannot succeed without.**



# FIX: Project Ambassador + Cubicle Champions

## Project Ambassador (client-side):

- ▶ Stays engaged throughout — doesn't hand off and disappear
- ▶ Owns change management and adoption

## Cubicle Champions:

- ▶ The peers colleagues actually turn to for help
- ▶ When THEY are bought in, adoption follows naturally
- ▶ **Identify them early. Train them first.**



# FIX: IT from Day One + Smart Partner Strategy

**IT is inheriting the system — they need to upskill WITH the build.**

- ▶ If IT doesn't understand what was built, nobody can support it
- ▶ Don't bring them in at the end

## **On partners:**

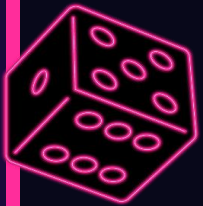
- ▶ Do what makes sense in-house
- ▶ Find the RIGHT partner for each specific job
- ▶ Not one vendor for everything





# PITFALL #4

**No User Buy-In, Faith, or Training**



# THE FEAR: “Is This Going to Replace Me?”

**Address it directly. Don't dismiss it.**

- ▶ AI eliminates tasks — usually the ones people hate most
- ▶ People who help build the tool become the experts on it
- ▶ That's job security, not a threat

**“Your job isn't going away — but someone who knows AI might get it if you don't engage now.”**



# FIX: Start With the Wow

**Tools they already use. Zero new learning curve.**

- ▶ Copilot in Teams, Outlook, Excel
- ▶ One genuine “that just saved me 20 minutes” moment
- ▶ **changes the entire conversation**

Build trust before you build complexity.



## FIX: Listen to the Frontline

- ▶ Bring the team in BEFORE decisions are made, not after
- ▶ People support what they help create

**Listen to frontline workers —  
not just what management wants to report on.**

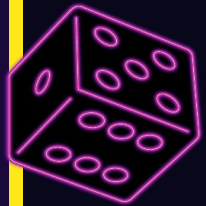
The most valuable AI use cases are buried  
in daily frustrations, not executive dashboards.





# PITFALL #5

**Weak AI Strategy & Governance**



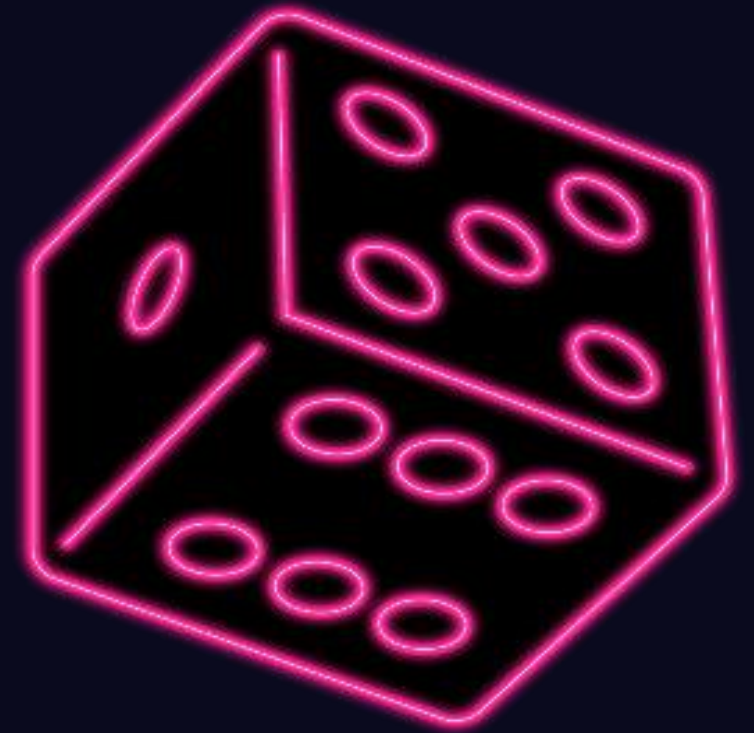
# THE QUESTION EVERYONE HAS

**“Where is my data going?”**

**“What is my exposure?”**

**“Who can access what AI sees?”**

These questions are stalling AI projects at every level — from IT to the boardroom.



# ANSWERING THE DATA QUESTION

## Your data is NOT training the model.

- ▶ Enterprise M365 Copilot operates inside your tenant boundary
- ▶ Consumer Copilot and Enterprise Copilot are NOT the same

## Most exposure comes from problems that already exist.

- ▶ Overshared SharePoint
- ▶ Ungoverned Power Platform environments
- ▶ No DLP policies in place

AI doesn't create the problem. It reveals it.



# FIX: Governance Foundations

## Environment Strategy

- ▶ Dev / Test / Production separation. Know what lives where.
- ▶ Environment routing — control where new apps land

## DLP Policies

- ▶ Control which connectors can talk to which data

## Microsoft Purview

- ▶ Sensitivity labeling. Know what data you have before AI touches it.

## SharePoint Governance is your foundation.

If SharePoint is a mess, Copilot will surface that mess — confidently.



# WHAT GOOD

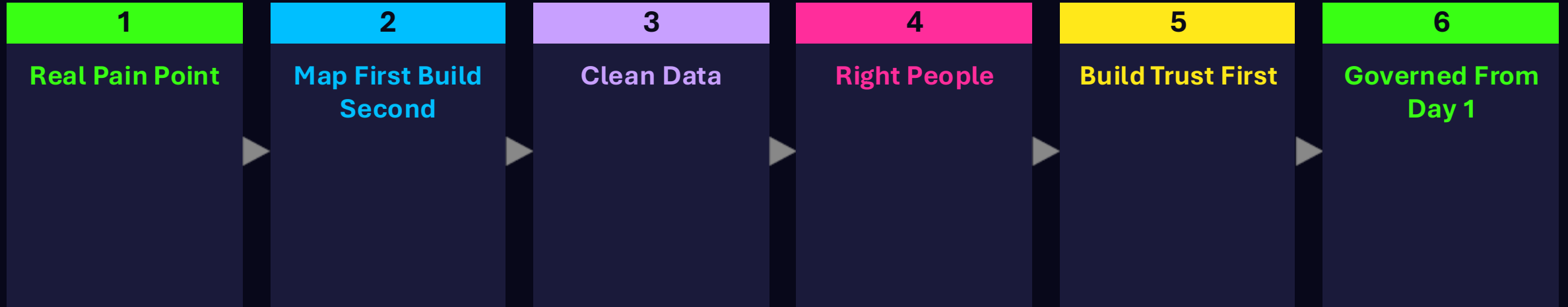


## LOOKS LIKE





# WHAT GOOD LOOKS LIKE



# THE RESULT

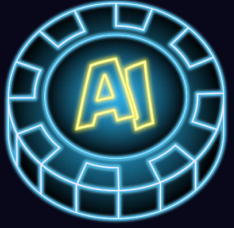
**Measurable time savings.**

**High adoption.**

**IT owns it confidently.**

Because every decision was made with the right people,  
the right process, and the right foundation.





# Q & A

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[worldmaxp2.com](http://worldmaxp2.com)

