For CTOs and Heads of Data

Most forecast arguments are data-quality arguments in disguise.

Run these four data checks before the forecast argument reaches the CTO.

Decision	Evidence to supply	Check before action
01 / Data Quality **Which data problems move the forecast**	The forecast's input tables with row counts, null rates, duplicate keys and freshness, this month and last.	Rank by forecast impact; each fix gets an owner.
02 / Assumptions **Which model inputs nobody refreshed**	Every assumption in the driver model with its last-updated date and its owner.	Owners refresh or defend anything older than 90 days.
03 / The Ai Note **What the AI tools do with company data**	Per approved tool: data it can reach, where outputs go, retention, admin logs and the administrator.	Legal and IT sign the note before it circulates.
04 / Duplicates **Which reporting pipes to switch off**	Reports and pipelines with sources, owners, last run and last known reader.	A named reader confirms before anything is switched off.

Monthly, before the forecast closes.

Run the data check the week before the forecast, so the CFO's bridge starts from clean inputs instead of explaining them afterwards.

An AI note written from the sales pages.

The vendor's page says what the tool can do; the note needs what your configuration does with your data. Pull the settings, the logs and the contract terms, and let the model draft only from those.

The CTO owns the switch. The model ranks the problems and drafts the note. Retiring a pipe, changing a permission or approving a tool stays with a named engineer.

Measure the workflow: Forecast inputs passing the check · assumptions under 90 days old · pipes retired · AI note reviewed on time.

Put the data check before the forecast.
Bring one forecast and its tables. We can define the checks, the note and the first run.

Sample output on page 2. Companion prompt and downloads.

CTO / AI configuration note

AI configuration note

Illustrative / Synthetic · Northstar Workflow · 21 September 2026 review

Gaps first / TO AGREE

Retention setting, log retention, contract training terms and log content visibility are missing. Legal and IT sign-off is pending; no compliance claim is possible.

Draft workspace / configuration note

Fictional sandbox, exported 18 September 2026. Administrator: IT operations. [T01]

Approved aggregate CSV
Manual upload only

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Draft workspace
No CRM / HR connector

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Private review folder
No outbound automation

Question	What the record shows	Evidence
What can it reach?	Manually uploaded approved aggregate CSVs; no connected source systems.	T01
Where do outputs go?	Private review folder; no automatic external sends.	T01
How long is data kept?	UNKNOWN. Retention field absent; obtain setting export.	T01
Who sees the audit trail?	IT administrators see sign-in, upload and export events. Content visibility unverified.	T02
Is data used for training?	UNKNOWN. Contract terms were not supplied.	T03

Technical follow-up

IT operations: export retention settings and verify a sample event end to end. **Legal:** review supplied terms once available. Owners are role placeholders in this synthetic scenario; deadlines TO AGREE.

Before the forecast

D01 was last refreshed 1 May, over 90 days ago. Finance must refresh or defend the margin driver before using it. [D01]

Before retiring a pipe

Revenue extract B appears to duplicate A. Its last reader is unconfirmed. Do not switch it off until a named reader validates the dependency. [T04]

Synthetic evidence: T01-T04 and D01. This note describes the fixture configuration, not a real vendor or assurance result.