AI Readiness Checklist for Business Leaders

Thinking about using AI in your business?

Before diving in, it's important to make sure your organization is properly prepared. This checklist will help you assess your readiness, identify key opportunities, and avoid common pitfalls—so you can adopt AI confidently, securely, and strategically.

Strategic Planning
Define why and how you'll use AI in your business.

- We've identified our main goals for AI (e.g., efficiency, customer service, cost savings)
- We know how we'll measure success (e.g., time saved, customer satisfaction)
- We have a timeline for rollout
- We've allocated a budget for tools and training

Identify Use Cases

Pinpoint where AI will provide value.

- We've listed 3 time-consuming tasks that could be automated
- Our team needs help managing emails, meetings, or customer service
- We want better document summaries, reporting, or business insights

Want a Safer AI Tool?

Consider Microsoft Copilot – it works within your Microsoft environment and respects your existing security and compliance policies.

Review Current Capabilities
Ensure a secure, AI-friendly foundation.

- We have clear data policies and proper file permissions
- Security audits are performed regularly
- Our team receives cybersecurity training
- We use Microsoft 365 or Google Workspace
- We have reliable backups and disaster recovery
- Our team is comfortable using cloud-based tools

Implementation Readiness

Pinpoint where AI will provide value.

- We've planned for staff AI training
- We've chosen internal AI champions
- We've identified data that should never be shared with AI tools
- We have policies for reviewing and validating AI-generated content
- We're prepared to monitor and audit AI use regularly