

AI Readiness Checklist

For Alberta Businesses

7 categories | 35 checkpoints | Assess your AI readiness in 30 minutes

Before deploying AI tools like Microsoft Copilot, take 30 minutes to assess your organization's readiness. This checklist covers 7 key areas: strategy, data governance, technical infrastructure, operations, risk & compliance, people, and implementation. Use it as a self-audit or bring it to your IT partner for guidance.

1. Business Strategy & Goals

- Identified top 3 business areas where AI can help
 - Defined measurable goals (e.g., reduce admin time by 30%)
 - Leadership supports AI as a strategic initiative
 - AI adoption aligns with IT roadmap
-

2. Data & Security Foundations

- Microsoft 365 / Google Workspace permissions are up to date
 - Sensitive data is classified (financial, HR, client, IP)
 - Staff access follows least-privilege principles
 - Shadow storage is controlled
No files on personal drives, USB, or unapproved cloud apps.
 - MFA and conditional access policies enforced
 - Documentation exists for where data lives
-

3. Technical Readiness

- Microsoft 365 tenant meets Copilot prerequisites
 - Shared mailboxes, Teams, SharePoint, OneDrive organized
 - Files properly permissioned
 - Devices secured and centrally managed
 - Systems for automation exist (Power Automate, Zapier, etc.)
-

4. Operations & Workflows

- Identified 5+ repetitive tasks suitable for automation
- Departments have mapped weekly recurring work
- Core SOPs documented
- Workflow owners assigned for each process

5. AI Risk & Compliance

- Shadow AI discovery completed
Do you know what AI tools staff are already using?
- AI Usage Policy in place
- Employees know which data is approved vs. banned for AI
- Controls for public vs. private AI defined
- Vendor AI data retention policies understood

6. People & Training

- Staff know basics of safe AI usage
- AI champions identified in key departments
- Team training plan in place
- Employees understand prompt-writing fundamentals

7. Implementation & ROI

- 30-90 day AI roadmap exists
- KPIs defined for before/after measurement
- Rollout plan for Copilot and automation tools
- Governance and review plan in place

How Did You Score?

Score	Rating	What It Means
28 - 35	Ready	Your environment can support AI adoption. Build your roadmap.
18 - 27	Partially Ready	Address gaps before deployment. Security and data governance are critical.
0 - 17	Not Ready	Foundational work needed first. Get your data house in order before AI tools.

Need Help Getting AI-Ready?

IT Works MSP offers a **free AI readiness assessment**. We evaluate your M365 environment, data governance, and security posture — then tell you exactly what needs to happen before AI delivers real value.

Book your assessment: itworksmsp.ca/contact | 1 (800) 566-4188 | info@itworksmsp.ca

Based in Airdrie, Alberta. Serving Calgary, Edmonton, and beyond.