

Microsoft 365 AI Readiness Checklist

A practical pre-Copilot / private-AI readiness guide for identity, data exposure, security, governance, and rollout planning.

How to use this: mark unknowns as risks. The most important answer is not whether every box is already checked — it is whether owners, evidence, and remediation are clear enough before AI makes internal data easier to discover.

1. Identity and Access

Status	Readiness item	Owner / note
☐ Ready ☐ Gap ☐ Unknown	MFA coverage is enforced for all users, not only administrators.	
☐ Ready ☐ Gap ☐ Unknown	Conditional Access policies reflect location, device, role, and risk.	
☐ Ready ☐ Gap ☐ Unknown	Break-glass accounts are protected, documented, and reviewed.	
☐ Ready ☐ Gap ☐ Unknown	Admin roles are least-privilege and reviewed on a recurring schedule.	
☐ Ready ☐ Gap ☐ Unknown	Inactive users, stale guests, and shared accounts are removed or justified.	

2. SharePoint, Teams, and Data Exposure

Status	Readiness item	Owner / note
☐ Ready ☐ Gap ☐ Unknown	Sensitive sites and libraries have named business owners.	
☐ Ready ☐ Gap ☐ Unknown	External links, anonymous links, and guest access are reviewed.	
☐ Ready ☐ Gap ☐ Unknown	Old project Teams and groups are archived or closed out.	
☐ Ready ☐ Gap ☐ Unknown	Overshared libraries are remediated before Copilot or AI retrieval rollout.	

Status	Readiness item	Owner / note
☐ Ready ☐ Gap ☐ Unknown	Sensitive-data locations are known and prioritized.	

3. Security and Monitoring

Status	Readiness item	Owner / note
☐ Ready ☐ Gap ☐ Unknown	Defender / endpoint coverage is understood and exceptions are tracked.	
☐ Ready ☐ Gap ☐ Unknown	Audit logging and alert routing are enabled for key identity and data events.	
☐ Ready ☐ Gap ☐ Unknown	Mailbox forwarding, risky inbox rules, and privileged mailbox access are reviewed.	
☐ Ready ☐ Gap ☐ Unknown	Incident response contacts, escalation path, and evidence capture are documented.	
☐ Ready ☐ Gap ☐ Unknown	Remediation backlog is prioritized by risk and business impact.	

4. Governance and AI Use

Status	Readiness item	Owner / note
☐ Ready ☐ Gap ☐ Unknown	Approved AI tools and prohibited data categories are documented.	
☐ Ready ☐ Gap ☐ Unknown	Users know which workflows require human review.	
☐ Ready ☐ Gap ☐ Unknown	Vendor terms, retention, logging, and model-training/data-use policies are reviewed.	
☐ Ready ☐ Gap ☐ Unknown	AI pilot scope is bounded by department, data source, and success criteria.	
☐ Ready ☐ Gap ☐ Unknown	Exceptions and policy changes have owners and review cadence.	

5. Rollout Readiness

Status	Readiness item	Owner / note
☐ Ready ☐ Gap ☐ Unknown	Leadership can explain the risk posture in plain language.	
☐ Ready ☐ Gap ☐ Unknown	Pilot users are trained on data boundaries and review expectations.	
☐ Ready ☐ Gap ☐ Unknown	Success metrics include risk reduction, productivity, and support load.	
☐ Ready ☐ Gap ☐ Unknown	Remediation work has owners, dates, and evidence requirements.	
☐ Ready ☐ Gap ☐ Unknown	There is a clear decision point: not ready, pilot-ready, or rollout-ready.	

Readiness scorecard

Area	Score 1–5	Highest-risk gap	Next action
Identity and access			
SharePoint / Teams exposure			
Security monitoring			
AI governance			
Rollout plan			

Suggested next step: If two or more areas are unknown or below a 3/5, request a Microsoft 365 AI Readiness Review before expanding AI access to company data.

This checklist is a practical readiness guide, not legal advice. Map regulated or contractual obligations to the applicable standard, contract, or counsel-reviewed policy.