

BTS - AI Readiness Checklist

This checklist provides a practical starting point for assessing AI readiness across security, access, data protection, and user training.

3 Critical Questions Before Deploying AI

1. What sensitive data could AI access today?
2. Who currently has access to critical business information?
3. Can your organization monitor and audit AI activity?

Identity & Access Management

- ☐ Enforce MFA for all users
- ☐ Disable legacy authentication
- ☐ Audit Global Administrators
- ☐ Implement Conditional Access

Microsoft 365 Permission Cleanup

- ☐ Audit SharePoint permissions
- ☐ Review Teams & guest access
- ☐ Remove overshared OneDrive files
- ☐ Validate Microsoft 365 group ownership
 - ☐ Remove stale users & groups

Copilot & AI Readiness

- ☐ Enable audit logging
- ☐ Review Microsoft Graph permissions
- ☐ Pilot Copilot with limited users first
- ☐ Define approved AI usage policy

Data Protection

- ☐ Encrypt sensitive data
(use a VPN or Cloud Secure Edge) **Ask us about options!**
- ☐ Apply retention policies
- ☐ Restrict confidential AI access

Endpoint & Device Security

- ☐ Deploy EDR/XDR protection – Ask us about SentinelOne EDR!
 - ☐ Require encrypted devices (requires premium license)
 - ☐ Enforce Intune Compliance (requires premium license)
 - ☐ Block unmanaged devices (requires premium license)
- ☐ Remove unsupported operating systems – Ask us to audit your OS's!

Monitoring & User Training

- ☐ Centralize logs into SIEM
- ☐ Monitor risky sign-ins
- ☐ Alert on abnormal downloads
- ☐ Conduct AI security awareness training
- ☐ Train staff on prompt safety

Tally checks above. AI Readiness Score is ____/26

Exercise:

Which topic(s) does your business struggle with most right now?
(Example: Monitoring and User Training and Data Protection)

What are 3 realistic checkboxes you can complete this month?

Circle where your confidence level is that you know what data
is being used in Generative AI at your office.

Not confident 1-----2-----3-----4-----5-----6-----7-----8-----9-----10 Very confident



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