

AI Readiness Checklist: Preparing Your Business for Microsoft 365 Copilot

A step-by-step guide to prepare your business for Microsoft 365 Copilot adoption

Introduction

Microsoft 365 Copilot is transforming how modern teams work — automating routine tasks, generating insights, and enhancing productivity across Word, Excel, Outlook, Teams, and PowerPoint. But before your business can unlock its potential, it's critical to ensure you're AI-ready: that your data, people, and governance are aligned to safely and effectively use AI in daily workflows.

✅ Step 1: Assess Your Microsoft 365 Environment

Goal: Identify current strengths, risks, and blockers.

- Inventory existing Microsoft 365 services (Teams, SharePoint, OneDrive)
- Audit tenant structure, permissions, and lifecycle
- Confirm licensing and MFA enforcement
- Map data owners and stakeholders

💡 Frontier AI Consulting offers a comprehensive AI Readiness Assessment to evaluate your tenant health and Copilot readiness.

🔒 Step 2: Secure & Govern Your Data

Goal: Ensure Copilot only accesses the right data — not everything.

- Enable and review Microsoft Purview policies
- Clean up stale or public data
- Apply retention/classification policies
- Confirm insider risk and DLP configurations

🛡️ Copilot uses the same permissions model as Microsoft 365 — strong data governance equals strong AI governance.

👤 Step 3: Prepare Your People

Goal: Build confidence, awareness, and skill before launch.

- Identify early adopters and champions
- Schedule awareness sessions
- Define prompt-writing and responsible AI usage
- Update acceptable use policies
- Provide role-based Copilot training

🎓 Change management is 70% of successful AI adoption. Focus on people as much as technology.

🧠 Step 4: Pilot & Measure Results

Goal: Validate business value and governance readiness.

- Launch a controlled pilot
- Define success metrics
- Gather feedback
- Track usage and adjust policies

📊 Frontier AI Consulting helps organizations measure Copilot ROI and adoption metrics using Power BI dashboards.

🔄 Step 5: Establish Continuous Governance

Goal: Keep AI usage secure, compliant, and productive long-term.

- Enable ongoing audit logging
- Schedule quarterly access reviews
- Monitor usage and drift
- Continue executive reviews

🧩 Our Frontier aEye Audit solution provides audit-ready Copilot activity monitoring with compliance tracking.

📋 Final Readiness Score

Readiness Area	Status(✓/X)	Notes
Microsoft 365 Environment Assessed		
Data Governance Configured		
Workforce Trained		
Pilot Completed		
Continuous Governance Plan		