

Executive AI Readiness Checklist

5 Controls to Validate Before Scaling Microsoft 365 Copilot

Readiness before enablement.

A concise executive screen for validating governance, security, data exposure, identity, adoption, and operating readiness before Microsoft 365 Copilot scales.

Assess

Current baseline

Govern

Risk and controls

Scale

Pilot and operations

CONTROL 1

Validate Your Readiness Baseline

Goal: Establish a leadership-ready view of current Copilot and enterprise AI readiness before enablement expands.

- ☐ Confirm business objectives, rollout scope, and executive accountability.
- ☐ Review current Microsoft 365 licensing, tenant configuration, and Copilot prerequisites.
- ☐ Identify governance owners across IT, security, compliance, legal, and business functions.
- ☐ Document known readiness concerns, open risks, and decision deadlines.
- ☐ Decide what evidence leadership needs before broader rollout decisions are made.

Evidence to capture:

Owner, known gaps, decision deadline, remediation dependency.

CONTROL 2

Reduce Data Exposure Before Copilot Scales

Goal: Reduce oversharing and sensitive content exposure before Copilot makes existing access easier to discover.

- ☐ Review SharePoint, OneDrive, Teams, and Exchange access patterns.
- ☐ Identify stale sites, abandoned files, broad sharing links, and unmanaged guest access.
- ☐ Validate sensitivity labels, retention policies, DLP rules, and Purview alignment.
- ☐ Confirm ownership for high-risk content repositories.
- ☐ Prioritize remediation for data domains that could create executive, regulatory, or customer exposure.

Evidence to capture:

Owner, known gaps, decision deadline, remediation dependency.

CONTROL 3

Align Leaders, Users, and Responsible AI Expectations

Goal: Ensure stakeholders understand how Copilot should be used, governed, and escalated.

- ☐ Align leadership on acceptable use, risk tolerance, and decision rights.
- ☐ Define responsible AI expectations for users, managers, and support teams.
- ☐ Prepare role-based communication for pilot teams and leaders.
- ☐ Establish escalation paths for data exposure, inaccurate outputs, or policy questions.
- ☐ Confirm that adoption goals are tied to business outcomes, not tool activation alone.

Evidence to capture:

Owner, known gaps, decision deadline, remediation dependency.

CONTROL 4

Pilot With Success Metrics and Guardrails

Goal: Launch a controlled pilot that validates business value and governance readiness together.

- ☐ Select pilot teams with clear use cases, accountable sponsors, and manageable data exposure.
- ☐ Define success metrics before launch, including productivity, risk, adoption, and support signals.
- ☐ Configure access, labels, policies, and guardrails before users begin testing.
- ☐ Capture user feedback and risk signals during each pilot sprint.
- ☐ Document go / no-go criteria for broader rollout.

Evidence to capture:

Owner, known gaps, decision deadline, remediation dependency.

CONTROL 5

Operationalize Ongoing AI Governance

Goal: Keep Copilot and enterprise AI adoption secure, measurable, and defensible over time.

- ☐ Schedule recurring access reviews and data governance checks.
- ☐ Monitor usage, policy drift, support issues, and emerging Microsoft 365 changes.
- ☐ Refresh training and responsible AI guidance as features evolve.
- ☐ Maintain executive reporting for readiness, risk concentration, remediation progress, and adoption value.
- ☐ Assign owners for ongoing governance, remediation, enablement, and audit readiness.

Evidence to capture:

Owner, known gaps, decision deadline, remediation dependency.

FINAL READINESS SCORE

Final Readiness Score

Use this page to summarize whether each readiness domain is ready for scale or requires focused action before broader enablement.

Readiness Domain	Ready	Needs Attention	Notes / Evidence
Strategy & Governance	☐	☐	
Security & Compliance	☐	☐	
Data & Content	☐	☐	
Identity & Access	☐	☐	
Change & Adoption	☐	☐	

Need a scored baseline?

Start the Executive AI Readiness Review to receive a readiness score, prioritized findings, a leadership-ready PDF report, and Frontier Advisor follow-up access.

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