

AI Readiness Checklist for Small Business

AI tools can save your team real time, but they also reflect whatever access and data habits you already have. Use this checklist to make sure your business is ready before rolling AI out beyond a few curious users.

How to use: Check only what you can confirm is in place today, then total your checks at the end.

1 Goals

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- ☐ **You've identified three or more repetitive tasks AI could help with**
Drafting, summarizing, data entry, reporting, customer replies.
- ☐ **Each use case has a success measure**
Hours saved, faster turnaround, fewer errors.
- ☐ **Someone owns the AI rollout**
Not just 'whoever is interested'.

2 Data & permissions

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- ☐ **File sharing permissions have been reviewed for oversharing**
Microsoft 365 Copilot can surface anything a user already has access to.
- ☐ **Sensitive information is labeled or restricted**
HR, financial, and client-confidential data.
- ☐ **Old, duplicate, and outdated files have been cleaned up**
AI answers are only as good as the data behind them.
- ☐ **Company data lives in managed systems, not personal accounts**

3 Policy & tools

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- ☐ **A written AI acceptable use policy exists**
What's allowed, what's not, and why.
- ☐ **Staff know which AI tools are approved**
Business-tier tools with data protection terms.
- ☐ **Confidential or client data isn't entered into free consumer AI tools**
- ☐ **AI output is reviewed by a person before it's sent to clients or relied on**

4 Rollout

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- ☐ Licensing has been confirmed for the tools you plan to use
- ☐ A small pilot group tests before company-wide rollout
- ☐ Staff receive hands-on training with real examples from their work
- ☐ Results are reviewed after 30–60 days before expanding

Your score

Items checked: _____ of 15 = _____ %

90–100%

Strong

You have solid fundamentals.
Review this checklist twice a year
to keep it that way.

65–89%

Gaps to close

A good base with a few real
exposures. Start with the
unchecked items in the first two
sections.

Below 65%

At risk

Several core protections are
missing. Prioritize now, before an
incident sets the agenda for you.

Get practical about AI.

FUSION 1 helps small businesses prepare data, set policy, and automate real workflows with AI.

[Book a free IT review](#)

Call or text 814-499-2119
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