



Secure AI Readiness Checklist

20 checks before you put AI to work in your business

Most AI projects fail before they start — wrong use case, messy data, or no security plan.

Run these 20 checks first. If you can't tick a box, that's exactly where to focus.

1 Find the Right Opportunity

- Listed the 5 tasks that eat the most hours every week (be specific)
- Identified where leads or calls are missed (after hours, weekends, busy periods)
- Ranked each opportunity by impact, effort, and risk - not by hype
- Picked ONE first project small enough to ship in 30 days

2 Get Your Data Ready

- Know where your customer/business data actually lives (and who can touch it)
- Documented your FAQs, processes, and pricing - AI is only as good as what you feed it
- Cleaned obvious duplicates and outdated records in your CRM or database
- Decided what data is OFF-LIMITS to any AI tool (financials, health data, PII)

3 Lock Down Security (the step everyone skips)

- Checked each AI tool's policy: is your data used to train their models?
- Created separate business logins - no personal accounts for company AI tools
- Turned on two-factor authentication on every AI tool and connected account
- Limited each tool's access to the minimum data it needs (least privilege)



Secure AI Readiness Checklist

Page 2 of 2

4 Check Compliance Before You Deploy

- Know which rules apply to you (HIPAA, GLBA, FERPA, state privacy laws)
- Updated your privacy policy to reflect AI use where customer data is involved
- Set a human-review step for anything AI sends to customers (at least at first)
- Have a written record of which AI tools you use and what they access

5 Roll Out Without Breaking Things

- Tested with a small pilot (one workflow, one team) before going wide
- Defined what 'working' means - hours saved, calls answered, response time
- Trained the team on what the AI does, its limits, and when to step in
- Have a fallback plan: if the AI fails, the old process still works

How did you score?

16-20 checked: You're ready. The question is which build delivers ROI first.

8-15 checked: Solid base, real gaps - most businesses sit here.

0-7 checked: Don't buy any AI tool yet. Start with a roadmap.

Wherever you landed: book a free 30-minute AI Opportunity Audit at orchemind.com