



Microsoft Copilot Readiness Assessment

for Businesses



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Rate your company's readiness using the following scale:

1 = Not Ready At All 2 = Minimally Ready 3 = Partially Ready 4 = Almost Ready 5 = Fully Ready

BUSINESS & STRATEGIC ALIGNMENT

	1	2	3	4	5
Company leadership is aligned with buy-in for AI adoption.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees are open and eager to embrace AI.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Daily operations and business practices will benefit from AI.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The business understands Copilot's business value and risks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clear guidelines exist for how AI supports the firm's goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

TOTAL SCORE (UP TO 25 POINTS): _____

LICENSING & TECHNICAL FOUNDATION

	1	2	3	4	5
Microsoft 365 licensing is in place.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Core Microsoft tools are actively in use.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Microsoft 365 tenant is up-to-date & securely managed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Devices and infrastructure meet modern security and performance standards.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IT staff are prepared to support Copilot configuration and troubleshooting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

TOTAL SCORE (UP TO 25 POINTS): _____

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DATA SECURITY & COMPLIANCE

	1	2	3	4	5
Confidentiality safeguards are in place. (<i>encryption, secure storage, ethical walls</i>)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Permissions and access controls are properly configured and reviewed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The company understands how Copilot handles and processes data.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An AI Use Policy exists, tailored for business practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guidelines define what data can and cannot be used with Copilot.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

TOTAL SCORE (UP TO 25 POINTS): _____

CHANGE MANAGEMENT

	1	2	3	4	5
A communication plan exists for introducing AI to employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A training program is ready to support Copilot adoption in workflows.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change champions or early adopters are identified within the company.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Metrics are defined to measure AI adoption success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feedback loops exist to adjust AI use based on employee experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

TOTAL SCORE (UP TO 25 POINTS): _____

YOUR RESULTS (and what they mean)

75-100	READY FOR ROLLOUT Your company has a strong foundation for adoption.
50-74	PILOT READY Shore up your gaps, while starting the adoption process.
Below 49	NEEDS ADDITIONAL PREPARATIONS Build foundational structures to support AI adoption.

Contact Net Friends for more helpful content!

Our Contact Information

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