



AgileIT

Family-owned managed IT since 2007 | Melbourne & Mornington Peninsula

A PRACTICAL BASELINE FOR BUSINESS OWNERS

AI Readiness Checklist for Business Owners

Ten sections, twenty checkpoints. Determine whether your AI usage is controlled, secure, and delivering value, or whether it has grown quietly inside the business without a plan.

How to use this checklist

Work through each section and tick the checkpoints you can confidently answer **yes** to. The total is less important than the pattern. A cluster of unchecked boxes in one section tells you exactly where to start. If you cannot confidently answer yes to most of the boxes, your AI usage is likely unmanaged.

Prepared by Agile IT Solutions. Family-owned managed IT, cyber security and AI enablement for Australian SMBs since 2007. Microsoft AI Cloud Partner. Founding member of SMBiT Professionals.



Why AI readiness matters

AI has arrived inside your business whether you planned for it or not. It is embedded in Microsoft 365, in your CRM, in marketing tools, in design platforms, and on the laptops of any staff member with curiosity and a browser. The question is not whether your team is using AI. The question is whether the business is getting the value, controlling the risk, and steering the direction.

This checklist gives you a structured way to find out. Ten short sections cover the dimensions that matter most: visibility, policy, ownership, data protection, security alignment, output validation, cost control, integration, risk awareness, and direction. Work through them in any order. Each unchecked box is a place where a small amount of structure now will prevent a larger problem later.



01 Visibility

You cannot manage what you cannot see. Shadow AI usage grows quietly inside almost every business.

- You know which AI tools your team is currently using.
- You can identify where AI is embedded in your existing platforms (Microsoft 365, CRM, finance).

02 Policy

A written policy turns intent into a standard staff can actually follow.

- You have a documented AI usage policy.
- It is clear what data can and cannot be entered into AI tools.

03 Ownership

When no one is accountable, every problem becomes everyone's problem and no one's.

- There is one accountable owner for AI within the business.
- Responsibility is defined for risk, cost, and outcomes.

04 Data Protection

AI tools route data through systems your business does not control. Staff need to know what is safe to enter.

- Staff are aware of data sensitivity (client, financial, legal, IP).
- Controls are in place to prevent inappropriate data exposure.



05 Security Alignment

AI sits inside the same identity and access fabric as the rest of your business. It should be secured the same way.

- AI-enabled tools are included in your security model.
- Multi-factor authentication and identity protections are consistently enforced.

06 Output Validation

AI generates confident-sounding answers that are sometimes wrong. A human owns the decision, not the model.

- AI-generated outputs are reviewed before they are used externally.
- There is clear accountability for decisions made using AI.

07 Cost Control

AI licensing has crept into Microsoft 365, CRMs, marketing tools and standalone apps. The bill is no longer in one place.

- You have visibility over AI-related licensing costs.
- You have identified duplicate tools or overlapping functionality.

08 Integration

AI delivers value when it supports a defined process. Used at an individual level only, it stays a curiosity.

- AI is supporting defined business processes.
- AI usage is consistent across the team, not ad-hoc at an individual level.



09 Risk Awareness

Staff are the first line of defence. They need to know the risks before they can avoid them.

- Staff understand the risks of AI usage.
- Training or written guidance has been provided.

10 Direction

A short-term plan turns AI from a stack of point tools into a deliberate capability.

- You have a defined AI strategy for the next 12 months.
- AI investment is aligned to specific business outcomes, not vendor hype.

What your score means

There is no perfect score for AI readiness, and the total matters less than the pattern. Look at the shape of what is checked and what is not:

Mostly checked

You have a managed AI position. Continue investing in the dimensions where the checks are weakest, and revisit the checklist quarterly. AI tools change fast; a managed position today is not a managed position in 12 months without review.

Clusters of unchecked boxes in one section

That section is your starting point. A weak Policy section, for example, tells you that the next step is a written usage policy. A weak Cost Control section tells you to audit your AI licensing across all platforms.

Unchecked across most sections

AI is happening inside the business but no one is steering it. That is the most common state for Australian SMBs in 2026. It is also the state most exposed to data loss, runaway licensing cost, and inconsistent output quality. A short structured engagement will turn unmanaged use into a managed capability.

Want help turning the gaps into a plan?



Agile IT runs a free 45 to 60 minute discovery conversation, on-site or via Microsoft Teams. We walk through where your business is, where the AI exposure is, and what a sensible first 90 days of structured AI enablement looks like. No quote pushed, no obligation.

Book a discovery conversation at agileit.com.au/contact.html

or call 1300 859 910 and ask for the team.



About Agile IT Solutions

Agile IT is a family-owned managed IT, cyber security and AI enablement business, founded in 2007. We work with small and medium businesses across Melbourne and the Mornington Peninsula. Our service is delivered through the AgileMANAGED platform: one accountable partner across IT support, cyber security, AI, business voice and connectivity.

AgileAI, our AI enablement service, helps SMBs put structure around Microsoft 365 Copilot, agent governance, and the broader AI surface inside their business. We are a Microsoft AI Cloud Partner and a founding member of SMBiT Professionals.

How we work

Every engagement starts with a discovery conversation, either on-site or via Microsoft Teams. It is 45 to 60 minutes, free of charge, structured around five themes, and ends with you in control of the next step. There is no quote pushed at the end.

Get in touch

Phone: 1300 859 910

Web: agileit.com.au

Email: admin@agileit.com.au

Mornington: Building C 6/41 Watt Rd, Mornington VIC 3931

Melbourne: Level 2/88 Jolimont St, East Melbourne VIC 3002

This checklist is offered as general orientation for Australian SMBs evaluating their AI readiness. It is not legal, compliance, or risk-management advice. For advice tailored to your specific environment and obligations, talk to a qualified provider or your trusted advisors.