Preparing for AI Checklist

By following this checklist, your company can ensure that your data is well-prepared for the integration of AI/Microsoft Copilot, enhancing its accuracy, efficiency, and effectiveness in your business operations. Remember that clean data is an ongoing commitment that contributes to the success of AI transformation.

Data Quality and Hygiene

- Evaluate the quality of your existing data.
- Identify and address any data inconsistencies or errors.
- Implement data quality checks and validation processes.
- Regularly monitor and clean your data to maintain quality.

Example

Implement data cleaning routines to remove duplicate records and correct inaccuracies.

Role-Based Data Security

- Set up robust security measures to protect sensitive data.
- Implement role-based access controls to ensure that each user has access only to the data necessary for their role.

Environment Configuration

- Ensure that your IT environment is optimised for AI integration.
- Consider cloud-based solutions for scalability.
- Include a data backup and disaster recovery plan to ensure data resilience.

Example

Utilise cloud-based storage solutions like Azure to easily scale resources as needed.

Data Labelling and Categorisation

- Properly label and categorise your data to enhance AI understanding.
- Ensure consistent labelling for efficient data retrieval and analysis.

Data Archiving and Retention

- Establish clear data archiving and retention policies.
- Define how long data should be stored and when it should be archived or deleted.
- Ensure compliance with data regulations.

Example

Set expiration date columns in document libraries to auto archive documents that are no longer needed after a certain period.
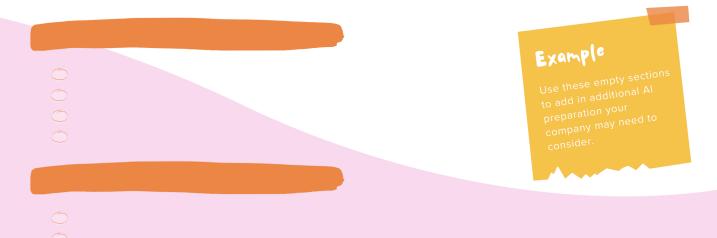
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Preparing for AI Checklist

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Consultation and Training

- Consider seeking consultancy services for AI integration.
- Explore tailored training courses for your team to effectively use Copilot.

Example

Enrol your team in AI training programs that align with your specific business needs.

Stay Informed

- Stay up-to-date with the latest Copilot features, changes, and
- announcements.
  Enable dedicated team members to read and share relevant updates from the Message center.

Example

Use these empty sections to add in additional AI preparation your company may need to consider.

Feel free to customise this checklist further to suit your company's specific needs and requirements. At **No More Bad Mondays,** we're here to assist you in this journey, offering a range of services, including consultancy and tailored course creation. So, say goodbye to bad Mondays and embrace the future of AI-powered productivity with confidence. If you're looking for support in preparing for AI integration or have any questions, don't hesitate to contact us today. Let's work together to make every day a great day for your business.