

AI Readiness Checklist for Enterprise Data Environments

What needs to be true about a data environment before AI workloads can operate on it reliably and safely. A structured six-area assessment that applies to any modern data platform.

ARCHITECTURE · GOVERNANCE · AI FOUNDATIONS

NORDICDYNAMICS.EU

NORDIC DYNAMICS

Enterprise assessment tool

02 / 10

Purpose and method

This checklist defines what needs to be true about an enterprise data environment before AI workloads can operate on it reliably and safely. It applies to any modern data platform. Work through all six areas before enabling production AI workloads.

01 PURPOSE

This checklist defines what needs to be true about an enterprise data environment before AI workloads (assistants, copilots, retrieval systems, autonomous agents, natural language query tools) can operate reliably and safely on it. It is structured as an assessment tool for enterprise teams.

02 HOW TO USE IT

Assess each item as Met, Partially Met, or Not Met. Any item marked Not Met is a gap that should be addressed before enabling AI workloads.

Items marked Partially Met need investigation to determine severity.

03 HOW THE SIX AREAS ARE STRUCTURED

01-03 **Workspace governance, data documentation, semantic model quality.** The foundational layer. Every reliable AI output depends on these being in place.

04-06 **Access controls, AI-specific configuration, operational readiness.** The AI enablement layer that sits on top of the foundation.

An organisation with perfect AI configuration but poor workspace governance, missing documentation, or low semantic model quality will still get unreliable AI outputs. The foundational areas are prerequisites.

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

03 / 10

AREA 01 FOUNDATIONAL

Environment structure and ownership

Whether AI systems can operate within clear boundaries, with accountable ownership and consistent structure.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Every data environment, workspace, or project has a named owner who is accountable for its contents, data quality, and access decisions.	☐	☐	☐
Data is separated by sensitivity level. Sensitive data does not co-exist with general-purpose analytics or development content in the same shared space.	☐	☐	☐
Production environments are clearly distinguished from development, test, and sandbox environments through a documented naming convention.	☐	☐	☐
No empty or orphaned objects remain in production. Containers with sensitive names but no content are removed or documented.	☐	☐	☐
Naming follows a documented convention that an AI system or a new team member can interpret without prior knowledge of the organization's internal structure.	☐	☐	☐
Draft, temporary, and experimental objects are either in dedicated development areas or clearly marked, so an AI system can distinguish production from non-production content.	☐	☐	☐
Every environment or dataset has a description explaining its purpose, scope, and the type of data it contains.	☐	☐	☐

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

04 / 10

AREA 02 FOUNDATIONAL

Data documentation

Whether AI systems have enough context to produce accurate, meaningful outputs instead of guessing.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
All significant data objects (datasets, tables, models, pipelines) have descriptions that explain their purpose, contents, and intended audience.	☐	☐	☐
All business metrics and calculated measures have descriptions. Descriptions are concise, front-loaded with the business meaning, and include the calculation logic and any caveats.	☐	☐	☐
Column and field descriptions exist for business-critical fields, particularly those with technical or ambiguous names.	☐	☐	☐
Object and field names use human-readable language. Acronyms, abbreviations, and internal codes are avoided or documented with synonyms.	☐	☐	☐
Naming is consistent within and across datasets. Field names are distinct enough that an AI system does not match the wrong field.	☐	☐	☐
Where the platform supports it, business-term synonyms are mapped to technical field names so natural-language queries resolve correctly.	☐	☐	☐

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

05 / 10

AREA 03 FOUNDATIONAL

Data model and definition quality

Whether AI systems can reliably use defined metrics and relationships instead of generating their own calculations.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Data models follow a clear, documented structure with separation between transactional data and reference or dimension data.	☐	☐	☐
Relationships between data objects are defined and documented. No critical table site disconnected from the model it belongs to.	☐	☐	☐
Technical and helper fields are hidden from consumers and AI systems. Only business-relevant fields are exposed.	☐	☐	☐
Defined business metrics are tested with the AI tool to confirm it uses the official definitions instead of inventing its own calculations.	☐	☐	☐
Complex logic (custom aggregations, parameters, currency conversion, special handling) is documented in descriptions so AI systems interpret it correctly.	☐	☐	☐
Models or datasets intended for AI consumption are marked as trusted or endorsed where the platform supports it. Unverified models are not exposed to business users through AI tools.	☐	☐	☐

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

06 / 10

AREA 04 ENABLEMENT

Access controls

Whether AI systems inherit appropriate permissions instead of operating with broader access than intended.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Service accounts and automated identities used by AI systems follow least-privilege principles. Each has access only to the data it needs.	☐	☐	☐
Role assignments are reviewed and documented. No user or service account holds broader access than its role requires.	☐	☐	☐
Any AI integration authenticates with a dedicated, scoped identity, not with a personal admin account or a broad organisation-wide credential.	☐	☐	☐
The distinction between raw data-layer access and curated model-layer access is understood. Controls applied at one layer do not automatically apply at the other.	☐	☐	☐
Users who interact with AI systems understand what permissions those systems inherit and what data they can reach.	☐	☐	☐

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

07 / 10

AREA 05 ENABLEMENT

AI-specific configuration

Specific to AI workloads, to be addressed before AI tools are enabled.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
The organisation has made a deliberate decision about which users or groups have access to each AI tool, instead of enabling it everywhere by default.	☐	☐	☐
Users have been trained to verify AI outputs. They understand AI systems are nondeterministic and must be critically appraised, not treated as authoritative.	☐	☐	☐
Where AI integrations expose data or operations to other systems, they expose only what is appropriate for the intended use, not the full set of operations the underlying identity could perform.	☐	☐	☐
Any deployed AI agent is scoped to specific data sources with appropriate access controls, and its description accurately reflects its capabilities so other systems invoke it correctly.	☐	☐	☐
If building toward a unified semantic or knowledge layer for AI, the underlying data (naming, documentation, relationships, business definitions) is consistent enough to produce a reliable result.	☐	☐	☐
Data boundary implications are understood. The organisation knows where each AI tool processes data when it surfaces data in a conversation, and under what terms.	☐	☐	☐

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

08 / 10

AREA 06 ENABLEMENT

Operational readiness

Whether the organisation can maintain AI readiness over time, not just at the point of initial assessment.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Data refresh schedules are configured and monitored. Stale data produces AI outputs that are correct against the dataset but misleading against current reality.	☐	☐	☐
A process exists for reviewing and updating descriptions, synonyms, and business definitions when models change.	☐	☐	☐
New data models go through a readiness review before AI access is enabled, so users do not get unreliable outputs from undocumented models.	☐	☐	☐
AI integration scopes and permissions are reviewed periodically. As data sources change, an AI system's effective access may drift from its intended scope.	☐	☐	☐
An accountability structure exists for AI readiness. Someone (data owner, governance lead, platform team) is responsible for maintaining the conditions that make AI outputs reliable.	☐	☐	☐

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

09 / 10

AREA 06 ENABLEMENT

Scoring guide

Count the items in each area and record the totals below. Then assess the environment against the rating criteria.

AREA	MET	PARTIALLY MET	NOT MET
01 Environment structure and ownership			
02 Data documentation			
03 Data model and definition quality			
04 Access controls			
05 AI-specific configuration			
06 Operational readiness			
Total			

RATING CRITERIA

AI Ready	All items Met across all six areas.
Conditionally Ready	All items in Areas 1-3 Met. Some items in Areas 4-6 Partially Met with a documented remediation plan.
Not Ready	Any item in Areas 1-3 Not Met. AI workloads should not be enabled until foundational gaps are addressed.

ORGANISATION _____ ASSESSED BY _____

DATE _____ NEXT REVIEW _____

Nordic Dynamics

nordicdynamics.eu

NORDIC DYNAMICS

Enterprise assessment tool

10 / 10

The next step

Nordic Dynamics helps organisations close the gaps this checklist identifies, across the architecture and governance layer, with deep specialism in Microsoft Fabric environments.

01	AI Readiness Assessment A structured evaluation of whether your data environment can support reliable AI workloads, covering documentation, semantic consistency, access controls, and operational maintenance. For organisations moving toward Copilot, agents, or other AI tooling that needs a dependable data foundation.
02	Governance Health Check For Microsoft Fabric environments: an automated scan using GovernView, with a prioritised findings report and executive walkthrough. The fastest way to validate this self-assessment against real tenant data.
03	Architecture Review A structured assessment of your workspace design, domain structure, and security model. For organisations where the checklist reveals structural issues that go beyond individual item fixes.
04	Governance Framework Setup Implementation of governance standards, workspace policies, and an operating model tailored to your organisation. For teams that know what needs to change and need help building it.
05	Architecture Workshop A tailored session for data platform teams covering governance principles, workspace design, and AI readiness. For organisations that want the broader team aligned on these standards.

All services are delivered remotely. On-site delivery is available in DACH, Nordics, and Switzerland.
branislav@nordicdynamics.eu · nordicdynamics.eu

Nordic Dynamics

nordicdynamics.eu