

AI Readiness Checklist for Microsoft Fabric Environments

What needs to be true about a Fabric environment before AI workloads can operate on it reliably and safely. A structured six-area assessment for enterprise data teams.

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Purpose and method

This checklist defines what needs to be true about a Microsoft Fabric environment before AI workloads can operate on it reliably and safely. Work through all six areas before enabling production AI workloads.

01 PURPOSE

This checklist defines what needs to be true about a Microsoft Fabric environment before AI workloads (Copilot, MCP, data agents, Fabric IQ, external AI agents) can operate reliably and safely on it. It is structured as an assessment tool for enterprise clients.

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.

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AREA 01 FOUNDATIONAL

Workspace governance

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

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

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AREA 02 FOUNDATIONAL

Data documentation

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

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
All workspace items (lakhouses, semantic models, pipelines, notebooks) have descriptions that explain their purpose, contents, and intended audience.	☐	☐	☐
All measures in semantic models have descriptions. Descriptions are concise (under 200 characters), from loaded with the business meaning, and include the calculation logic and any caveats.	☐	☐	☐
Column descriptions exist for business-critical columns, particularly those with technical or ambiguous names.	☐	☐	☐
Item names use human-readable English. Acronyms, abbreviations, and internal codes are avoided or documented with synonyms.	☐	☐	☐
Naming conventions are consistent within and across semantic models. Column names are unique across tables to prevent AI agents from matching the wrong field.	☐	☐	☐
A linguistic schema (Q&A setup) has been configured for semantic models that will be used with Copilot. Synonyms map common business terms to technical field names.	☐	☐	☐

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AREA 03 FOUNDATIONAL

Semantic model quality

Whether Copilot and data agents can reliably use defined measures and relationships instead of generating their own calculations.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Semantic models follow star schema design with clear separation between fact tables and dimension tables.	☐	☐	☐
All tables have defined relationships. No orphan tables exist (tables with no relationship to any other table).	☐	☐	☐
Technical and helper columns are hidden from report consumers and Copilot. Only business-relevant fields are visible.	☐	☐	☐
Measures are tested with Copilot to verify that Copilot uses the defined measures instead of writing its own DAX.	☐	☐	☐
Complex patterns (calculation groups, field parameters, currency conversion, disconnected tables) are documented in measure and table descriptions so AI agents can interpret them correctly.	☐	☐	☐
Semantic models intended for Copilot consumption are endorsed (Promoted or Certified). Unendorsed models are not presented to business users for Copilot use.	☐	☐	☐

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AREA 04 ENABLEMENT

Access controls

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

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Service principals used for MCP servers or automated processes follow least-privilege principles. Each has access only to the workspaces and items it needs.	☐	☐	☐
Workspace role assignments (Admin, Member, Contributor, Viewer) are reviewed and documented. No users or service principals have broader access than their role requires.	☐	☐	☐
The MCP server, if deployed, authenticates with a dedicated service principal scoped to specific workspaces, not with a personal admin account or a tenant-wide service principal.	☐	☐	☐
The distinction between data-layer access (OneLake via MCP) and semantic-layer access (Copilot via semantic models) is understood. Controls at the semantic layer do not apply at the data layer.	☐	☐	☐
Users who will interact with AI agents understand what permissions those agents inherit and what data they can access.	☐	☐	☐

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AREA 05 ENABLEMENT

AI-specific configuration

Specific to AI workloads, to be addressed before Copilot, MCP, data agents, or Fabric IQ are enabled.

ASSESSMENT ITEM	MET	PARTIAL	NOT MET
Copilot tenant settings have been reviewed. The organisation has made a deliberate decision about whether Copilot is enabled organisation-wide or for specific security groups only.	☐	☐	☐
Users who will use Copilot have been trained to verify outputs. They understand Copilot is nondeterministic and must be critically appraised, not treated as authoritative.	☐	☐	☐
If MCP servers are deployed, the server exposes only the tools and resources appropriate for the intended users, not the full set of operations the service principal could perform.	☐	☐	☐
If Fabric data agents are deployed, each agent is scoped to specific data sources with appropriate access controls, and its description accurately reflects its capabilities.	☐	☐	☐
If building toward Fabric IQ, the underlying data layer (naming, documentation, relationships, business definitions) is consistent enough to produce a reliable ontology.	☐	☐	☐
Data boundary implications are understood. The organisation knows where each AI tool processes data when it surfaces data in a conversation.	☐	☐	☐

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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
Refresh schedules are configured and monitored. Stake data produces AI outputs that are correct against the dataset but misleading against current reality.	☐	☐	☐
A process exists for reviewing and updating measure descriptions, synonyms, and the linguistic schema when semantic models change.	☐	☐	☐
New semantic models go through a readiness review before Copilot access is enabled, so users do not get unreliable AI outputs from undocumented models.	☐	☐	☐
MCP server configurations and data agent scopes are reviewed periodically. As workspaces and data sources change, effective scope may drift from 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.	☐	☐	☐

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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 Workspace governance			
02 Data documentation			
03 Semantic model 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 _____

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The next step

Nordic Dynamics helps organisations close the gaps this checklist identifies, 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	An automated scan of your Fabric environment using 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.

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