

The Jonesi Consultancy | Houston, TX

EXECUTIVE AI ADOPTION · INTEGRATION CHECKLIST

SAFE AI INTEGRATION



Evaluate. Protect. Comply. Integrate with Confidence.



Every unchecked box is either a task or a risk you are accepting on purpose.

1

Safe AI Integration Checklist

Use this before you connect an AI tool to real systems or real data. Every unchecked box is either a task or a risk you are accepting on purpose. There is no third option.

SECURITY

- ☐ Connections use current encryption standards
- ☐ Data is encrypted in transit and at rest
- ☐ Vendor follows a recognized security framework
- ☐ Multi factor authentication is supported
- ☐ Vulnerability assessments are performed regularly

KEY QUESTION: How is our data protected from unauthorized access or breach?

PRIVACY

- ☐ Personal data handling meets applicable privacy law
- ☐ Data minimization principles are followed
- ☐ Users are told how their data is used
- ☐ Access, correction, and deletion options exist
- ☐ Privacy impact assessment is complete

KEY QUESTION: Is personal and sensitive data respected and protected?

COMPLIANCE

- ☐ Solution supports our industry requirements
- ☐ Data residency requirements are met
- ☐ Audit logs and reporting are available
- ☐ Contracts include compliance and data protection terms
- ☐ Use aligns with internal policy and ethical standards

KEY QUESTION: Does this solution keep us compliant and audit ready?

DATA GOVERNANCE

- ☐ Data sources are documented and approved
- ☐ Data quality, accuracy, and freshness are validated
- ☐ Ownership and stewardship are assigned
- ☐ Retention and deletion policies are enforced
- ☐ Data lineage and usage tracking are in place

KEY QUESTION: Do we know where our data comes from, who owns it, and how it is used?

PERMISSIONS AND ACCESS

- ☐ Role based access controls are enforced
- ☐ The tool can reach only the data it needs
- ☐ Permissions are reviewed on a set cadence
- ☐ Third party integrations are scoped and limited
- ☐ Access can be revoked quickly

KEY QUESTION: Are the right people and systems reaching the right resources?

RISK

- ☐ Potential risks are identified and documented
- ☐ Human oversight and escalation paths are defined
- ☐ Guardrails and content filters are enabled
- ☐ Business impact of failure is understood
- ☐ Incident response plan covers AI specific failures

KEY QUESTION: What could go wrong, and how will we respond?

2 Before You Go Live

The Final Pass

VENDOR TRANSPARENCY

Ask what models are used, what data trained them, and where the limits are. Vague answers are an answer.

SANDBOX FIRST

Test in a non production environment with representative data before anything touches live systems.

TRAIN THE USERS

People receive practical training on safe and effective use, not a slide deck and a login.

DEFINE SUCCESS

Success metrics and monitoring are defined before launch, not reconstructed afterward.

3 Take Action

Work The Checklist In This Order

1 CHECK

Review each item with your team

2 ADDRESS

Resolve gaps and document decisions

3 APPROVE

Secure stakeholder sign off

4 INTEGRATE

Deploy and monitor continuously

SAFE INTEGRATION TODAY. SMARTER OUTCOMES TOMORROW.

The organizations that move fastest with AI are the ones that never have to stop and unwind a bad connection. Re-run this checklist at every renewal and every major release.

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