



The Enterprise Questionnaire Readiness Checklist

Enterprise buyers now send 150+ question security and privacy questionnaires at the procurement stage, and increasingly they include AI sections. Deals stall here. This 20-point self-check tells you in ten minutes whether you would pass. Tick only what you can prove with a document today, not what you "basically do."

Governance & Accountability

- ☐ A named individual is formally accountable for privacy compliance (a PIPEDA requirement, and Quebec's Law 25 requires a designated Person in Charge, published)
- ☐ A documented risk assessment exists, dated within the last 12 months
- ☐ Core policy suite is written and approved: privacy, data retention, access control, incident response, acceptable use

Data

- ☐ A data inventory exists: what personal information you hold, where it lives, why you have it, how long you keep it
- ☐ Data is classified by sensitivity, and handling rules differ by class
- ☐ You can answer "where is Canadian customer data stored and processed?" in one sentence

Vendors

- ☐ A current list of all vendors that touch personal or customer data exists
- ☐ Data processing terms or agreements are in place with those vendors
- ☐ New vendors go through a documented due diligence check before onboarding

Security Fundamentals

- ☐ MFA is enforced on email, cloud infrastructure, and admin accounts
- ☐ Access reviews happen on a schedule (who has access to what, and is it still needed)
- ☐ An incident response plan exists and has been tested at least once
- ☐ Staff receive security and privacy training, and attendance is recorded
- ☐ Offboarding removes system access the day someone leaves

AI Use (the new section buyers are adding)

- ☐ You have an inventory of AI tools in use, including ones staff adopted on their own
- ☐ A written AI acceptable-use policy defines what data may go into which tools
- ☐ AI vendors were assessed for data handling before adoption
- ☐ If AI touches decisions about people (hiring, eligibility), disclosure obligations have been checked

Evidence

- ☐ For every box above, you could produce the supporting document within 48 hours
- ☐ Someone owns keeping all of this current. It has a name attached, not "the team"

Scoring: 17 to 20, questionnaire-ready. 12 to 16, gaps a buyer will find, fixable in a quarter. Under 12, you are one enterprise deal away from discovering this the hard way.

Want the full picture? The BlueFlex Compliance Exposure Snapshot scores your posture across all of this in two weeks, fixed price, with a prioritized fix list. Contact us at:

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