



How to roll it out in 30 minutes

You don't need a consultant or an all-day meeting. Here's how to go from this kit to a signed policy in about half an hour of your time, plus a 10-minute team huddle.

Not legal advice. This kit is a starting point. Have your attorney review it if you handle health, legal or financial data, or if your contracts or industry have their own rules.

Before you start (5 minutes)

- ☐ **List the AI tools your team already uses.** Ask around, or put it in the staff chat: "Which AI tools or AI features do you use for work, and on which account?" Include features inside apps you already pay for, such as email, documents, design and accounting.
- ☐ **Pick one policy owner,** the person who approves tools and takes reports. In a small business that's usually you. Pick a backup too.

Step 1: Fill in the policy (10 minutes)

- ☐ Open **ai-use-policy.docx** and use Find to jump to each `[]`. Replace every bracket.
- ☐ In section 4, add any data types that are special to your business, such as patient forms, client case files or student records.
- ☐ In section 8, choose **Option A** (label automated replies) or **Option B** (label all AI-assisted messages), and delete the other.
- ☐ Set a review date no more than 12 months away, and put it in your calendar now.
- ☐ Delete the shaded "Guidance for the owner" boxes.

Step 2: Fill in the register (10 minutes)

- ☐ Open **approved-tools-register.xlsx**. Add one row for each tool you're approving.
- ☐ For each tool, open its own privacy or data-controls page and check the four things in the register's "How to use" tab: training, retention, human review and business plan. The policy's appendix lists the settings to look for in tools from four widely used providers.
- ☐ **Change the settings now** while you're there, for example turning off model training on any account where you can.
- ☐ Write "personal accounts NOT approved" wherever only a business plan is allowed.
- ☐ Save the register where staff can see it but not edit it, such as a view-only shared folder.

Step 3: Send it and print it (5 minutes)

- ☐ Open **rollout-email.docx**, fill in the brackets and send it to staff with the policy, the acknowledgment form and the staff poster attached, plus the register link.
- ☐ Print the **staff poster** for the break room or back office, or pin it in your staff chat.

Step 4: The 10-minute team huddle

Do this at your next regular team meeting or shift change. You don't need slides.

A simple running order

1. **Why (1 minute).** "AI tools are useful and you're welcome to use the approved ones. This policy just keeps customer and staff information safe and makes sure we check everything before it goes out."
2. **The poster (4 minutes).** Walk through the 5 do's and 5 don'ts. Spend the most time on the "never paste" items.
3. **Where things live (1 minute).** Show where the register is, and who to ask.
4. **Mistakes (2 minutes).** "If you paste something you shouldn't, tell me right away. You won't be in trouble for reporting it fast." Explain the 5 steps in section 10 of the policy.
5. **Questions and signatures (2 minutes).** Hand out the acknowledgment form, or ask people to sign and return it by [DATE].

Questions staff often ask, and plain answers

Question	Answer to give (check it against your filled-in policy)
"Can I use my own free account?"	Only if the register says so. Otherwise use the company account, because free personal accounts often handle data differently.
"Can I paste a customer email to get help replying?"	Only after you delete the name, email address, phone number and anything else that identifies them, and only into an approved tool.
"What if the AI feature is built into an app we already use?"	It still needs to be on the register before you use it with anything other than public information.
"Do I have to tell customers I used AI?"	Follow section 8. And always tell the truth if a customer asks.
"What if I already pasted something I shouldn't have?"	Stop, don't delete anything yet, and tell [NAME] now.

Step 5: Keep it alive (2 minutes a month)

- ☐ **Collect every signed acknowledgment** and file it where the policy says. Follow up with anyone who hasn't signed within a week.
- ☐ **New hires:** add the policy, poster and acknowledgment to your onboarding checklist.
- ☐ **People leaving:** remove their access to company AI accounts on their last day.
- ☐ **When a tool changes its terms** or you get an email about a privacy update, re-check its row in the register.
- ☐ **Once a year,** on the review date, re-read the policy, re-check every tool in the register, and ask staff to sign again if anything important changed.