



AI Use Policy Starter

A one to two page standard for adopting AI safely

This is a starting point, not a finished rulebook. Fill in the blanks with your team, keep it to a page or two, and review it every quarter. The goal is simple. Use AI confidently without putting your business or your clients at risk.

1. Approved Tools

List the specific AI tools your team is allowed to use. The most important move here is getting everyone onto business tier accounts, which do not train on your data, instead of free consumer logins.

Approved for use: _____

Not approved: _____

2. What Data Is Off Limits

A simple red, yellow, green list. Keep it short so people actually remember it.

Green. Safe to use

General questions, public information, brainstorming, drafting from non sensitive notes.

Yellow. Use with care

Internal documents and working material. Strip out anything identifying before pasting.

Red. Never paste

Client personal information, financials, contracts, passwords, source code, anything under an agreement to keep private.

3. Who Is Accountable

One named person approves new tools and answers the question, can I use this tool for that task. Not a committee. In a small business this is often the owner or the operations lead.

Accountable owner: _____

4. Human Review

The rule is simple. AI drafts, humans decide. Anything client facing, financial, legal, or published gets a human review before it goes out. This is how you catch the mistakes and the wrong answers that these tools still produce.

Always review before it goes out: _____

5. Staying Current

Book a short review every quarter. New tools, new rules, and anything that went wrong. A policy that is set once and never revisited stops working fast.

Next review date: _____

This starter supports practical standards and safe adoption. It is not legal or compliance advice. For legal sign off, work with your lawyer.