

The AI-Use Policy Checklist

The one-page set of rules that keeps your team from leaking your business into a chatbot.

FOR OWNER-OPERATORS, 5-50 EMPLOYEES

FROM THE WORKSHOP AI AT WORK WITHOUT GETTING BURNED

Your team is already using AI, whether you sanctioned it or not. The tool is not the risk. The missing rules are. Work through the five sections below with your team, check each line as you adopt it, and sign it on page two. Total time: about an hour.

1 Draw the data line

Most AI damage is not a hack. It is an employee pasting something sensitive into a free chatbot to save ten minutes.

- ☐ **Write the never-paste list.** Customer names and contact details, payment and bank information, employee records, pricing you have not published, anything under NDA, passwords and access keys.
- ☐ **Post it where work happens.** Pinned in your team chat, taped near shared computers, inside this policy. A list nobody sees is not a policy.
- ☐ **Set the default for gray areas:** strip names and numbers before pasting, or ask first. When in doubt, leave it out.

2 Approve the tools

Unapproved tools on personal accounts are where your data walks out the door quietly.

- ☐ **Keep a short approved-tools list:** which tool, which account, who pays for it. Business accounts for business work. Free personal accounts often use what you type to train their models.
- ☐ **Check the privacy settings on every approved tool.** Where a "do not train on my data" setting exists, turn it on. Takes minutes per tool.
- ☐ **Name one person who approves new tools.** No sign-off, not approved. That includes browser extensions and "free AI" add-ons.

3 Handle client data like it is your own

Your client did not agree to have their information processed by whatever tool your newest hire found last week.

- ☐ **Client material goes into AI tools only anonymized, or with written client permission.** Pick one and write it down.
- ☐ **Read your client contracts and NDAs before deciding.** Some already restrict third-party processing, and an AI tool is a third party.
- ☐ **Decide your answer before a client asks "do you use AI on our work?"** A written answer beats an improvised one every time.

4 Review before send

AI states wrong things with complete confidence. The last mile belongs to a human, always.

- ☐ **Nothing AI-drafted reaches a customer, vendor, or public channel without a human read.** No exceptions for "it looked fine."
- ☐ **The sender owns the words.** "The AI wrote it" is not a defense your business gets to use, legally or with a customer.
- ☐ **Verify every fact, number, name, and link the tool produced** before it goes out. The polish hides the errors.

5 Plan for the bad day

The cheap version of an incident is the one your team reports in the first hour. Silence is the expensive version.

- ☐ **Define what counts as an incident:** sensitive data pasted into an unapproved tool, an AI-drafted message sent with a serious error, client information exposed.
- ☐ **Make reporting safe.** No punishment for the person who raises a hand. Punish silence, not honesty, or you will only ever find out late.
- ☐ **Write the four steps:** contain it (delete the conversation, revoke access), assess what left, notify the client if their data was involved, then fix the rule that failed.
- ☐ **Put a review date on this policy.** Quarterly is enough. The tools change faster than your rules will.

Make it official

A policy becomes real when it has a date, an owner, and an audience. Walk your team through it once, out loud. Then sign it and keep it where the approved-tools list lives.

POLICY OWNER

DATE ADOPTED

NEXT REVIEW

FROM BOUBACAR

Want a second set of eyes on your AI setup?

I run a free AI audit for owner-operators: where AI can actually save you hours, where it can burn you, and what to fix first. One working session, about 45 minutes, and you leave with a written shortlist in priority order. No pitch deck, no jargon.

Reply to the email that delivered this checklist, or write me at boubacar@catalystworks.consulting with the subject line "AI audit".