AI Use Checklist for Businesses

Take 10–15 minutes. Answer for what your team does **today**, not what you plan. Type in this PDF or print it.

STEP 0

Find out what AI your team already uses

Ask staff which AI tools they use for work, including personal accounts, browser add-ons, meeting note-takers, and AI built into tools you already have. Then check which apps are connected to your email, files, and calendar.

QUESTIONS TO ASK YOUR STAFF aigroundrules.com/resources/ai-inventory-template

How to answer ☐ Yes needs proof: run the quick test first. ☐ Not sure? Mark Partly.

Yes	Clear, followed, and the quick test passes	Partly	Incomplete, inconsistent, or unsure	No	Missing	N/A	Does not apply. Write a short reason.

The seven checks

01-03 OF 07

Free help: a guide on our site with wording to copy. In the Starter Kit: the same thing as an editable Word or Excel file.

.01 Approved tools

Do staff know which AI tools and accounts they may use for work?

QUICK TEST Ask two staff which AI account they use for client work. Do the answers match the list?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

Publish an approved list with the accounts to use and who can approve a new tool.

FREE HELP
aigroundrules.com/resources/ai-inventory-template

IN THE STARTER KIT
02 Approved Tools Register

.02 Sensitive information

Do staff know what information they may paste, upload, or let AI read in each approved tool?

QUICK TEST Show a staff member a real client document. Can they say whether it may go into your main AI tool, and why?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

Give examples of what staff can share, what they must remove, and when to ask first. Removing names does not always make information safe: other details can still identify a person or client.

FREE HELP
aigroundrules.com/resources/client-data-and-ai-tools

IN THE STARTER KIT
03 Data Use Guide

.03 Human review

Does someone check AI output before it goes to clients, gets published, or informs an important decision?

QUICK TEST Pick the last piece of AI-assisted work that went to a client. Can you name who checked it and what they checked?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

Name the reviewer for each type of work and list what to verify, such as facts or calculations.

FREE HELP
aigroundrules.com/resources/ai-agent-human-approval-checklist

IN THE STARTER KIT
05 Human Review Checklist

The seven checks, continued

.04 Disclosure

Do staff know when and how to tell clients or colleagues they used AI?

QUICK TEST Ask a staff member what they would say if a client asked whether AI helped with the work. Is it what you would want said?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

Write a rule that reflects your client commitments. Give staff sample wording and a contact.

Telling a client you used AI does not make it OK to use information your rules restrict.

FREE HELP
aigroundrules.com/resources/ai-disclosure-to-clients

IN THE STARTER KIT
01 Employee AI Use Policy and 11 Client AI Questions

.05 Ownership

Do staff know who maintains the AI rules, approves exceptions, and answers questions?

QUICK TEST Ask two staff who decides whether they can try a new AI tool. Do they give the same name?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

Name an owner and backup. Post their contact details alongside the rules.

FREE HELP
aigroundrules.com/resources/ai-policy-template

IN THE STARTER KIT
04 Roles and Responsibilities

.06 Incident reporting

Do staff know where to report a data exposure, an unexpected AI action, or a mistake that affects clients, money, or a decision?

QUICK TEST Ask a staff member what they would do if an AI tool sent something to the wrong client. Do they say who to tell, and when?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

Publish a reporting contact. Tell staff: stop the task and report it right away. Record the tool, the time, and what happened, without forwarding sensitive information.

FREE HELP
aigroundrules.com/resources/ai-incident-first-hour

IN THE STARTER KIT
06 Incident Report

.07 AI agent permissions

Have you set limits on AI tools that can send emails, move files, change records, or spend money for you?

QUICK TEST Ask the tool to do one thing that needs approval, such as send a test email. Does it stop and wait for a person?

◯ Yes ◯ Partly ◯ No ◯ N/A

NOTE OR N/A REASON _____

IF PARTLY OR NO

List each of these tools and who owns it. Give it only the access it needs, and say which actions need a person's approval. A written rule is not enough: test that the tool really waits.

Mark N/A only if no AI tool can act for you. Write why.

FREE HELP
aigroundrules.com/resources/what-counts-as-an-ai-agent

IN THE STARTER KIT
08 Agent Permissions Addendum

What your answers mean

All Yes or N/A
Good. Set a date six months from now to run this checklist again.

Any No on 02, 06 or 07
Start there. These gaps can expose client information or let a mistake go unreported.

One or two Partly or No
Use the worksheet to fix them, one owner each.

Three or more Partly or No
Use the worksheet for your top three. The Starter Kit has a file for each of the seven checks, in one set. See aigroundrules.com/toolkits/starter-kit

Fix your top three gaps

Choose up to three checks you marked Partly or No. Start with gaps that could affect clients, expose sensitive information, or let an AI tool act on its own. Give each one owner. For "How we'll know it's done", write a check you can see happen, as in the example.

STOP **Has something already gone wrong?** Do not put it on this worksheet. Report it now, as in check 06.

EXAMPLE:	GAP WE FOUND	FIRST ACTION	HOW WE'LL KNOW IT'S DONE
	Staff use different AI accounts for client work.	The operations lead publishes the one approved account. Owner: Operations lead. Due date: Friday.	Two staff, asked at random, name the approved account and show they are signed in to it.

1 PRIORITY 1

GAP WE FOUND | FIRST ACTION | HOW WE'LL KNOW IT'S DONE

OWNER _____ DUE DATE _____

2 PRIORITY 2

GAP WE FOUND | FIRST ACTION | HOW WE'LL KNOW IT'S DONE

OWNER _____ DUE DATE _____

3 PRIORITY 3

GAP WE FOUND | FIRST ACTION | HOW WE'LL KNOW IT'S DONE

OWNER _____ DUE DATE _____

DATE WE'LL REVIEW PROGRESS _____

The AI Ground Rules Starter Kit: ten editable Word templates, an Excel tools register and a setup guide. aigroundrules.com/toolkits/starter-kit