



POLICY TEMPLATE · SEVEN LINES

The Practical Small-Business AI Policy *Template*

Short and specific beats long and unread. Replace the bracketed text with your own, keep it to a page or two, and make sure an ordinary employee could follow every line without a second opinion.

[*Company name*]: how we use AI at work

1 Approved tools

Name the tools people may use for work; anything else needs a quick ask first.

EXAMPLE

For work, we use [*tools*]. To use anything else for work, ask [*name*] first.

2 Information that must not be entered

List it concretely. “Be sensible” is not a rule; a do-not-paste list is.

EXAMPLE

Never paste into a public AI tool: client personal data, anything under NDA, commercially sensitive figures, passwords or credentials.

3 Permitted and prohibited uses

Say what AI is welcome for, and what it is not.

EXAMPLE

Welcome: drafting, summarising, research starting points. Not permitted: final decisions about people, or presenting AI output as fact without checking.

4 Required checking

AI output is a draft to verify, never an answer to trust.

EXAMPLE

Treat every AI output as a draft. The person whose name is on the work is responsible for checking it.



5 Human approval points

Name the decisions that always need a person to sign off first.

EXAMPLE

A person must approve before it leaves us: anything client-facing, anything with a legal or financial effect, anything about an individual.

6 Recording and disclosure

Say when AI use should be noted, and when a client should be told.

EXAMPLE

Tell a client when AI materially shaped the work we deliver to them and they would reasonably expect to know.

7 Where to ask for help

Name a person. Most slips are not defiance; someone guessed instead of asking.

EXAMPLE

Unsure? Ask [*name*] before you guess. Asking is always fine.

FOR THE AWKWARD CASES

“A client asks if we used AI.”

Answer honestly and plainly. If AI materially shaped the work, say so and explain how a human stayed responsible for it.

“It gave a confident answer I cannot verify.”

Then it is not an answer yet. Do not present it as fact. Check it, or leave it out.

“I want to try a new tool.”

Good. Ask first, so the data and security questions get a quick check before client work goes near it.

“I pasted something I should not have.”

Tell the named person straight away. Early is fixable; hidden is not.

PLEASE READ

This template is a **practical starting point, not legal advice**. The UK GDPR duties it touches are law; other parts are sensible habits. Depending on the personal data you handle and your sector, you may need specialist legal or data-protection advice. Start with the official **ICO** and **NCSC** guidance.

Discuss a governance pack

goodtransformer.ai/services/ai-advisory-for-teams · hello@goodtransformer.ai