AI POLICY & STAFF TRAINING · NEW TOOLS

New-tool approval checklist

Go through this list before anyone uses a new AI tool or feature for work. Most tools take 15 minutes.

TOOL AND WHAT IT'S FOR (SAMPLE)

Meeting-notes app that records and summarizes client calls, to save the office 2 hours a week.

DECISION (SAMPLE)

Approved for internal team meetings only; not for client calls, because it stores recordings outside our account.

The checks

CHECK	YES / NO / NOTES
There's a business or team plan, and we'd use it	
Our data isn't used to train its AI, or we can turn that off	
We know where our data is stored and how long it's kept	
We can delete our data, and export it if we leave	
Two-step sign-in is available, and we'll turn it on	
It asks only for the access it needs	
We know who in the company owns the account	
It won't be used with anything on our never-paste list	
If it talks to customers, it says it's AI and offers a person	
The cost is clear, including what happens after a free trial	

TOOL AND WHAT IT'S FOR

DECISION, BY WHOM, AND DATE

APPROVED FOR

NOT FOR