TAKE-HOME CHECKLIST | FROM THE TALK “BEHIND THE BOT”

Safe AI Use Checklist for Small Teams

Tick each box for every AI tool and automation your team uses. Anything you cannot tick is your to-do list for this week.

1 BEFORE YOU PASTE ANYTHING INTO AN AI TOOL

- ☐ I know what counts as sensitive: customer or employee personal details, financial or health information, IDs, passwords, contracts.
- ☐ Sensitive information stays out of free or personal AI accounts.
- ☐ For anything about clients, I use a business plan and have read how it handles and stores my data.
- ☐ I checked the tool's privacy settings, including whether my chats can be used to train the model.

2 AUTOMATED TEXTS AND EMAILS

- ☐ I have permission to contact every person on the list, and I can show where it came from.
- ☐ Every automated text says how to opt out, and STOP is honored right away.
- ☐ Messages go out at reasonable daytime hours. The federal telemarketing window is 8 a.m. to 9 p.m. in the recipient's time zone, and some states add rules.
- ☐ A person reviewed the wording, and I tested the whole flow on my own phone before it reached a customer.

3 ACCURACY AND PROMISES

- ☐ AI can sound sure and be wrong. I verify names, numbers, dates, prices and any legal or medical claim before it goes out.
- ☐ AI never makes quotes, promises or commitments for me without a person approving them.

4 YOUR INDUSTRY

- ☐ If I work in real estate, lending, hiring, healthcare, insurance or finance, I asked my attorney, broker or regulator which rules apply to AI-written content.

5 TEAM RULES

- ☐ We have a one-page AI rule: approved tools, what never goes in, who reviews outputs, and who to ask.
- ☐ Every AI account uses multi-factor sign-in, and former staff no longer have access.
- ☐ I keep a simple list of every AI tool and automation in use, and who owns each one.

WANT HELP TURNING THIS INTO YOUR TEAM'S ONE-PAGE AI RULE?

A hands-on 60 to 90 minute follow-up session is available on request: each person drafts their own one-page AI-use policy. Scan the code or reach out below.

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Educational information only, not legal advice. Rules vary by industry and change over time; confirm with your attorney or regulator.