

AI USAGE POLICY STARTER - BRIGHTLEAF & CO

Clear expectations for using AI at work before people invent their own.

A fictional starter policy for Sam Whitfield, MD. Written to be read, adapted, acknowledged and used.

PREPARED FOR

Brightleaf & Co

PREPARED BY

Ready-Set-Go.AI

PHASE

Set

CLASSIFICATION

Sample

SECTION 01

Approved, restricted and prohibited use

01

A starting policy. Adapt the specifics, then have the team acknowledge it. The goal is controlled enablement, not slowing people down.

Approved use

- Approved AI tools for general productivity with non-sensitive information
- Drafting, rewriting and formatting
- Summarising internal documents and emails
- Brainstorming and meeting summaries

Restricted use

- Client or confidential information only in approved, data-protected tools
- Anything reaching a client must be reviewed and owned by a person first
- AI drafts, people decide

Prohibited use

- Never put client personal information, financials, passwords or credentials into public tools
- No AI as final decision-maker on anything affecting a client or person
- No unapproved tools for company work

GOOD PRACTICE

If a task would be faster with a first draft, let AI write it, then make it yours.

SECTION 02

Data handling and approval process

/ 02

The simple test

If you would not be comfortable emailing it to an outsider, do not paste it into a public AI tool.

DATA HANDLING

Prefer tools that do not train on your data and keep information in your control. Unsure? Ask before you paste.

01

Request a new tool or use case.

Send a short note to the AI owner: what it is for, what data it touches and which tool is involved.

02

Owner reviews and updates the list.

The owner approves, declines or adjusts, then updates the approved-tools list.

03

Review every quarter.

Review whenever a significant new tool is adopted or a new data connection is proposed.

Why this exists

This is not about slowing anyone down. It is so the whole team can use AI confidently, knowing what is safe, what is not, and who to ask. Controlled enablement, not lockdown.

Acknowledged by: _____

Date: _____

AI owner: _____

Role: _____