AI starter pack

Readiness checklist, systems inventory and employee-use policy template

A. AI readiness checklist

Tick each point you can state today. What stays unticked is your work list.

Goals

- [ ] We can name one concrete task we want to improve (not "use AI" in general).
- [ ] We know how that task is measured today: time, cost, errors or complaints.
- [ ] There is a person with authority to decide and an approximate budget or range.

Data

- [ ] We know where the data we would need lives (email, documents, ERP, CRM).
- [ ] We can access them without breaking permissions or confidentiality.
- [ ] We know whether they include personal data or customer information.
- [ ] Quality is reasonable: not duplicated, outdated or contradictory.

People and process

- [ ] The person who does the task today takes part in the design and agrees with the change.
- [ ] We know which decisions a person must keep making.
- [ ] Someone will maintain the solution once the project ends.

Risk and rules

- [ ] We have a list, even a short one, of the AI tools already in use.
- [ ] Employees know what they may and may not paste into an AI tool.
- [ ] We know whether any use affects people: hiring, credit, education, health or access to services.
- [ ] There is a stop criterion: which result would make us abandon the project.

B. AI systems inventory

Fill one row per system, including those teams use without going through IT. The risk class is a hypothesis to confirm later.

System	Vendor	Purpose	Data used	Personal data?	Who decides	Human oversight	Risk (to confirm)	Owner
Customer support assistant	*Vendor X*	*Answer frequent questions*	*FAQ and orders*	*Yes*	*Support agent*	*Review of doubtful cases*	*Transparency*	*Head of support*

C. Employee AI use policy

1. We use only AI tools approved by [owner]. The current list is at [location].
2. We do not enter customers' or employees' personal data, trade secrets, passwords or confidential documents into an AI tool, except in tools approved for that.
3. A person reviews every AI output before it leaves the company or is used in a decision.
4. AI does not decide alone about people: hiring, dismissals, credit, evaluations or access to services.
5. When content is AI-generated and could be mistaken for human or real, we say so.
6. We check facts, figures, quotes and code before using them. We are responsible for the final result.
7. We respect copyright and licences for what we generate and what we enter.
8. We record relevant AI uses in [register] so we can explain what was done and when.
9. If something goes wrong (data leak, harmful output), it is reported to [contact] the same day.
10. This policy is reviewed every [6] months and whenever regulation or tools change.

> Indicative template. This is not legal advice: review it with your counsel before adopting it.

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