

AI USAGE POLICY WORKBOOK

updated 1/21/25

A guide for policy development



Policy Enforcement
Enforcement Approach
Current State
Business Functions



Your business is unique.

While AI is getting harder to ignore, you make the ultimate decision where your business lands - from "100% human only" approach to a "smaller company with multiple AI agents".

How would you balance potential benefits with probable consequences?

The AI policy is a way to communicate that decision to your employees, partners and customers. It's a documented approach that will assist with making vendor picks and product selection.

Use this guide for developing your own AI Usage policy - walking though possible applications and dreaming of your own. The options on each page meant to give you ideas and by no means exhaustive.

Regardless where you land, revisit the policy at least once every quarter as technology changes at a rapid pace. And check the guide for updates!

And if you have questions or would like assistance, please reach out.



Policy Enforcement Approach

With AI available on phones and inside the products, it's impossible to enforce usage compliance through restrictive measures like traffic blocks.

Here are few ideas to explore.

Educate

- Provide regular AI literacy training.
- Develop clear guidelines on safe usage.
- Explain the risks of data exposure and using AI outputs without human review.
- Adopt vetted AI tools.

Encourage

- Define easy process for requesting new AI tools.
- Provide rewards for sharing effective use cases in your organization.
- Allow experimentation in a safe monitored environments.
- Celebrate and welcome innovation.

Monitor

- Perform regular audits on AI usage and output quality.
- Keep track of subscription costs and measure true effectiveness and cost savings.
- · Run compliance reviews.
- Monitor data consumption and traffic to understand usage.

React

- Clarify the consequences for policy violation.
- Define worst case scenarios and appropriate response to it.
- Document incident escalation paths and encourage reporting issues.
- Analyze reasons for policy violations.



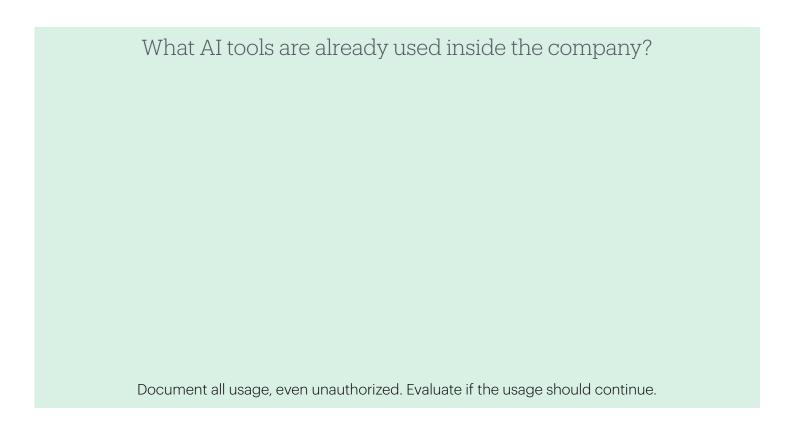
Current State - Restrictions

What industry compliance rules may affect your AI adoption?
(i.e. not providing financial advice without proper licensing)
Consider limitations to reduce legal exposure if AI provides wrong or harmful information.
What sensitive data is handled by your company?
☐ PII (personally identifiable information) - SSN, age, address, name
☐ Healthcare records
☐ Financial data
☐ Trade secrets
Other proprietary data

Ensuring this data is not uploaded to the public AI is critical as it can be used for training and leaked.



Current State - Usage



List lessons learned from current AI usage (improvements, mistakes, etc)

What should you do more off? What didn't work?



Business Function - Content Generation

Acceptable Use		Can Be Used For	
☐ Brainstorming ideas		☐ Social media posts	
☐ Generating outlines		☐ Blog posts	
☐ Editing content		☐ Internal communications	
☐ Creating content		☐ Marketing and ads	
☐ Providing feedback		☐ Customer communication	
Prohibited Use			
☐ Generating low quality content			
☐ Releasing content for publication without	ut review		
Verification Process			
☐ Double check facts, references and practical advice			
☐ Ensure no private information is included			
List Allowed Tools			
(include estimated cost)			



Business Function - Audio Generation

Acceptable Use Examples	Can Be Used For		
☐ Phone call automation	☐ Internal communication		
☐ Podcast generation	☐ Customer reach		
☐ Audio books narration	☐ Marketing and ads		
Prohibited Use Examples			
☐ Impersonating company staff			
☐ Creating fabricated and misleading audio recordings			
Verifica	ation Process		
☐ Double check facts			
☐ Ensure tone and delivery matches company's goals			
List Allowed Tools			
(include cost)			



Business Function - Image and Video Generation

Acceptable Use		Can Be Used For
☐ Creating visual concepts		☐ Social Media Posts
☐ Modifying existing media		☐ Blog Posts
☐ Creating production media		☐ Company communications
☐ Brainstorming new products		☐ Marketing and Ads
		☐ Product development
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Prohibited Use		
☐ Creating deepfakes or unrealistic produc	ct images	for advertising
☐ Violating intellectual property		
Verifica	tion Pro	ocess
Confirm the style and subject aligns with company's policy		
☐ Verify that image is not copyrighted		
List Allowed Tools		
(include cost)		



Business Function - Data Analytics

Acceptable Use		Can Be Used For
☐ Analyzing competitors		☐ Internal consumption
☐ Processing sales numbers		☐ Client reports
☐ Summarizing customer sentiment		☐ Strategic planning
☐ Identifying market trends		
Proh	ibited U	Ιαρ
Automating sensitive decisions without		
Automating sensitive decisions without	ргорег па	manreview
Verification Process		
☐ Confirming data accuracy		
☐ Confirming analysis accuracy		
List Allowed Tools		
(include cost)		



Business Function - Customer Support

Acceptable Use		Can Be Used For	
☐ Creating customer guides		☐ Answering simple queries	
☐ Creating communication templates		☐ Automating appointment	
☐ Generating answers to questions		scheduling	
☐ Automating simple tasks		☐ Customer communications	
		☐ Website chat agents	
Prohibited Use Unsupervised unguarded customer communication			
☐ Handling/processing sensitive data			
Verification Process			
☐ Define and test guardrails			
☐ Ensure private information is not disclosed			
List Allowed Tools			
(include cost)			



Business Function - Software Development/IT

	Can Be Used For		
	☐ Proof of concept		
	☐ New applications		
	☐ Existing internal applications		
	☐ Existing external applications		
Prohibited Use			
☐ Modifying security configurations			
☐ Handle authentication without review			
Verification Process			
f			
☐ Human verification before production release			
List Allowed Tools			
(include cost)			
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