AI Use Policy

[Company name] | Version 1.0 | Effective [date] | Policy owner: [name, role]

A free template from Purple AI (gopurple.ai). Replace everything in [brackets], delete what does not apply, and have your attorney review it before you adopt it. This template is not legal advice.

1. Why we have this policy

AI tools can save us time on writing, research, scheduling and paperwork. They can also make mistakes, expose private information and say things to customers we would not say. This policy explains which AI tools we use, what information can go into them, and what a person must check before AI-assisted work leaves the company.

It applies to everyone who works for or with [Company name], including employees, contractors and temporary staff, on company devices and on personal devices used for work.

2. Approved AI tools

Use only the AI tools listed here for company work. To add a tool, ask the policy owner (section 9).

Tool	Approved for	Account type	Data allowed (see section 3)
[e.g. ChatGPT Business / Microsoft Copilot / Gemini for Workspace]	[Writing, research, summaries]	[Company account only]	[Green and yellow]
[AI receptionist or features in our field software]	[Answering calls, booking within our rules]	[Company account]	[Yellow]
[Other tool]	[Use]	[Account]	[Tiers]

Personal or free AI accounts may be used only for green information. Where a tool offers business settings that keep our data out of model training, we turn them on.

3. What information can go into AI tools

Tier	Examples	Rule
Green	Public information, our published prices and services, general how-to questions, marketing drafts with no customer details, made-up or anonymized examples	OK in any approved tool
Yellow	Customer names, addresses and phone numbers, job details and photos, quotes and pricing, internal emails and documents, employee schedules	Only in approved company accounts listed in section 2
Red	Passwords and access codes, card and bank account numbers, Social Security and tax ID numbers, health information, background checks, anything under an NDA or a customer contract that restricts sharing	Never put into an AI tool

4. A person checks before it goes out

AI drafts. People decide. Before any of the following is sent, published or acted on, the person responsible reviews it and is accountable for it:

- Messages to customers, vendors or the public, including emails, texts, reviews and social posts
- Quotes, prices, invoices, contracts, change orders and anything involving money
- Changes to customer, job or financial records
- Hiring, firing, discipline, pay or other decisions about people

- Safety instructions, technical specifications, code or legal and compliance statements
- [Add or remove items for your business]

Check facts, numbers, names and dates. AI tools can produce confident answers that are wrong. If you cannot verify something, do not use it.

5. AI that talks to customers

- **Say it is AI.** Any AI that answers our phone, chat or texts says up front that it is an automated assistant for [Company name].
- **A person is always available.** Customers who ask for a person get one, either right away or with a callback time we can keep.
- **Safety goes to a person.** [e.g. gas smell, carbon monoxide alarm, sparking, flooding] are transferred or escalated immediately, with instructions to the caller to stay safe.
- **Stay inside our rules.** The AI books only approved job types and time slots, quotes only published prices, and never promises discounts, warranties or outcomes.
- **Calls and texts follow the law.** Get consent where required before AI calls or texts customers, follow call-recording notice rules in the states we serve, and keep records. [Ask your attorney which rules apply.]

6. Accounts, access and security

- Use company accounts for AI tools, protected by [multi-factor authentication / our password manager]. Never share logins.
- AI agents and automations get their own accounts with only the access their job needs.
- Turn on activity logs where the tool offers them, so we can see what an AI tool read, drafted or changed.
- When someone leaves the company or a tool is retired, remove its access the same day.

7. Honesty and ownership

- Do not use AI to impersonate a real person, fake reviews or testimonials, or make claims about our work we cannot back up.
- Do not present AI-generated images as photos of our real jobs.
- Work created for [Company name] with AI belongs to the company, like any other work product.
- Respect copyrights and licenses. Do not upload others' copyrighted material unless we have the right to use it.

8. Mistakes and incidents

If something goes wrong, such as red information going into an AI tool, an AI message sent to the wrong customer or an AI giving a customer wrong information, tell [policy owner] within [24 hours]. Reporting a mistake quickly is never a disciplinary issue. Hiding one is.

9. New tools, training and review

- **New tools:** ask [policy owner] before using a new AI tool or turning on a new AI feature in software we already use. We check what data it uses, where data is stored and whether it trains on our data.
- **Training:** everyone gets a short walkthrough of this policy when they start and when it changes.
- **Review:** [policy owner] reviews this policy every [6 months] and whenever we add a major AI tool.

10. Acknowledgment

I have read this AI Use Policy, I understand it, and I agree to follow it.

Name	Signature	Date

Template by Purple AI, an AI consulting firm in Minneapolis that builds and runs AI agent teams for small businesses. More: gopurple.ai/ai-policy-template-small-business/