



TEAM AND RESILIENCE

AI use policy starter

A starter worksheet for setting clear internal expectations around approved AI uses, human review, client data, attribution, and escalation.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

Your team needs a practical shared baseline before using AI in client work.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Name allowed use cases**

- ☐ 02 **Set data boundaries**

- ☐ 03 **Require human review**

- ☐ 04 **Label AI-created work where needed**

- ☐ 05 **Set approval paths**

- ☐ 06 **Review the policy regularly**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.