


AI Policy Rollout Guide - Manager's Checklist

-  Use this guide to implement the AI Usage Policy with your team.

Before Rollout

- ☐ Review the AI Usage Policy yourself.
- ☐ Ensure your team members read and sign the company's 'Corporate Artificial Intelligence (AI) Usage Policy'
- ☐ Identify which team roles are most likely to use AI tools.
- ☐ Customize the Approved Tools List if needed.
- ☐ Schedule a team briefing or onboarding session.

During Rollout

- ☐ Distribute the AI Usage Policy and Poster.
- ☐ Conduct a walkthrough of approved AI tools.
- ☐ Reinforce key risks (confidentiality, quality control, review).
- ☐ Distribute and collect signed Training Acknowledgment Forms.

After Rollout

- ☐ Follow up with a quick quiz or knowledge check.
- ☐ Maintain a list of authorized tool users.
- ☐ Encourage feedback on policy clarity and tool performance.
- ☐ Plan quarterly refreshers or updates.

AI Confidentiality Reminder

Before using any AI tool, ask yourself

- Am I entering any client, customer, or personal data?
- Could this information be confidential, sensitive, or regulated?
- Am I using an approved AI tool?

-  Never copy confidential data into ChatGPT, Copilot, or any other AI tools unless explicitly authorized.

- ☒ Use company-approved tools only.
- ☒ Follow the AI Usage Policy.
- ☒ When in doubt, ask your team leader or compliance contact.

Thank you for helping your team adopt AI safely and effectively.