

Your first 30 days

From the template to a team that uses AI tools by shared rules. Tick as you go.

POLICY OWNER _____ START DATE _____ REVIEW DATE _____

BEFORE YOU START DAY 0

- ☐ Name one owner for the policy and the register.
- ☐ Fill in every [bracket] in the policy. The made-up example shows a finished one.
- ☐ Check the policy with your adviser. The "Ask your adviser" sheet lists the topics.

WEEK 1 DAYS 1 TO 7 / SET UP

- ☐ Ask each team which AI tools, features and connections they already use. Make it safe to answer honestly.
- ☐ Choose the approved tools and set up work accounts with two-step sign-in.
- ☐ Fill in the register: data allowed, connections and whether they can write, approval setting, level, memory, scheduled tasks, owner.
- ☐ Switch off AI features and connections you have not checked yet.
- ☐ Approve the policy, date it and set its review date.

WEEK 2 DAYS 8 TO 14 / ANNOUNCE

- ☐ Present the six-slide deck at an all-hands. Leave time for questions.
- ☐ Send the policy and the staff guide to everyone. Pin the guide up.
- ☐ Ask everyone to sign the sign-off sheet.
- ☐ Name the checkers, and open one place for questions, slips and new tool requests.

WEEK 3 DAYS 15 TO 21 / TRAIN

- ☐ Run the first training session and log it in the training record.
- ☐ Ask each team to try the approved tools on two real tasks, at level 1 Read or 2 Draft.
- ☐ Apply the checking rule to everything that leaves the team.
- ☐ Answer every new tool request within the time the policy promises.

WEEK 4 DAYS 22 TO 30 / REVIEW

- ☐ Meet each team for 20 minutes: what helped, what got in the way, what is missing.
- ☐ Look at what came in: questions, slips and tool requests.
- ☐ Update the policy and the register, and tell everyone what changed.
- ☐ Book the next review and the refresher, and log every session.

SIGNS IT IS WORKING

- ☒ People ask before they try a new tool.
- ☒ Slips are reported the same day.
- ☒ Nothing leaves the team unchecked.
- ☒ Anyone can name what never goes in.
- ☒ Every agent in the register has an owner and a level.
- ☒ The training record shows who has been trained.