

STARTER KIT

# A.I. Starter Kit for Teams

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Pick the right tools for each job, set them up carefully, write your A.I. use policy, and roll it out in 30 days.

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# Start Here

## Who this kit is for

You run a small business, from a solo operator to a team of about 25. You've heard you "should be using A.I." Maybe you've tried a chatbot a few times. You want a straight answer to four questions:

1. **Which tools are worth paying for, for which jobs?**
2. **How do I set them up to reduce the risk of exposing customer data?**
3. **What rules should my team follow?**
4. **How do I actually make it part of the week, without it becoming another abandoned app?**

This kit answers those four questions in that order. It doesn't promise you'll save a certain number of hours or make more money. Nobody honest can promise that without knowing your business. Instead, the last chapter shows you how to **measure your own results**, so you can decide what's worth keeping.

## What's inside

| Chapter                                     | What you get                                                                                                          |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| 2. What A.I. assistants are good and bad at | A plain-language mental model, and a review habit for catching common errors                                          |
| 3. Tool picks by job                        | A decision table and verified plan prices (checked on 2026-10-18)                                                     |
| 4. Setup, step by step                      | Account ownership, security, a data-settings checklist, your "business profile" instructions, a shared prompt library |
| 5. Safe-use & privacy policy                | A complete, editable policy (also supplied as a separate Word file) with a data traffic-light system                  |
| 6. The 30-day rollout                       | A day-by-day plan, about 20–40 minutes a day                                                                          |
| 7. 25 starter prompts                       | Ready-to-use prompts for everyday office jobs                                                                         |
| 8. Worksheets                               | Task inventory, time baseline, tool register, monthly review                                                          |

**Prices change.** Every price in this kit was checked on official pages on 2026-10-18. A.I. vendors change plans often, so confirm the current price on the vendor's site before you buy.

# Safe-Use & Privacy Policy Template

This template is also included as an editable Word file (**A.I.-Use-Policy-Template.docx**). Replace the [BRACKETS] and delete what doesn't apply. *It has not been reviewed by an attorney and is not legal advice.* Have it reviewed by a qualified professional, especially if you handle health, financial or children's information, employ staff in several states, or serve customers in other states or countries.

## The data traffic light (the heart of the policy)

| Color                                                | What it includes                                                                                                                                                                                                                                                                            | Rule                                                                                                                                                                                                                                          |
|------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Green: OK to use</b>                              | Public, non-sensitive material you're allowed to use this way (your published website text and prices); generic drafts with no real personal or confidential details; made-up examples                                                                                                      | Use in any approved tool                                                                                                                                                                                                                      |
| <b>Yellow: approved uses only, minimum necessary</b> | Customer or employee details needed for a specific task (for example, a first name and job type to draft a reply); non-confidential internal procedures; non-public pricing                                                                                                                 | Only in a tool, plan and feature that [OWNER] has approved <b>for this purpose and data type</b> , with training off, access limited and retention known. Remove every identifier the task doesn't need. A business plan alone isn't approval |
| <b>Red: never</b>                                    | Passwords, payment card numbers, bank details, Social Security or tax ID numbers, government IDs, health or medical information*, background checks, alarm or lockbox codes, and anything covered by a confidentiality agreement or contract restriction (which may include supplier terms) | Never paste into any A.I. tool                                                                                                                                                                                                                |

**Not just pasting.** These rules apply to everything a tool can see: uploads, attachments, connected mailboxes and drives, automatic file search, call or meeting recordings and transcripts. Before you connect a mailbox, drive or meeting tool to an A.I. feature, check what it can reach and restrict it. If Red data can't be kept out, leave that feature disconnected, unless the documented health-information exception applies.

**Red always wins.** If any part of the material is in a Red category, or a contract or law prohibits the proposed use, or the use hasn't been approved, the whole thing is treated as Red, whatever the examples above say. Data covered by privacy laws can still be used in an approved Yellow way, but only after [OWNER] has reviewed the obligations that apply.

\*The only exception, and **only for health information** (not other Red data): if your business is regulated by HIPAA, the vendor has signed a business associate agreement (BAA) that covers the exact service and features you'll use, you use an approved configuration for an approved purpose, and [OWNER] has documented the compliance review in writing. A general data-processing agreement doesn't replace a required BAA. Other health-privacy laws may add requirements.

## Policy text

### [BUSINESS NAME] A.I. Acceptable Use Policy

Effective: [DATE] · Owner: [NAME, ROLE] · Review: every 6 months

**1. Purpose.** We use A.I. tools to work faster and serve customers better. This policy protects our customers, our team and our business while we do.

**2. Scope.** It applies to everyone who works for or with [BUSINESS NAME] (employees, contractors, family members helping out) and to any A.I. tool used for business work, on any device.

**3. Approved tools.** Use only the tools listed in our **A.I. Tool Register** (Worksheet C), with a business account where one is listed, and only for the data types approved there. To request a new tool or a new use, ask [OWNER]. Personal A.I. accounts may be used only for Green information.

**4. Data rules.** Follow the data traffic light above. When in doubt, treat it as Red and ask.

**5. Human review.** A person must review A.I. output before it is sent to a customer, published, or used in a decision. The reviewer checks **numbers, names and promises** and is responsible for the result.

### **6. Accuracy and honesty.**

- Don't present A.I.-generated facts, statistics or legal, tax or safety statements without checking a reliable source.
- Don't create fake reviews or testimonials, or post reviews of our business written by us, our staff or A.I. The FTC's Consumer Reviews and Testimonials Rule prohibits fake reviews, and Google prohibits reviews from people with a conflict of interest, even with disclosure.
- Don't use A.I. to impersonate a real person.
- Images: don't use A.I. images to misrepresent our actual work, team or results (for example, a fake "before and after").

## The one-page version for the break room

### Our A.I. Rules

1. Approved tools only (ask [OWNER]).
2. **Never** paste passwords, card numbers, IDs, health info or codes.
3. Customer details only in tools approved for that use, and only what's needed.
4. A human checks every A.I. draft: **numbers, names, promises.**
5. No fake reviews, fake photos or pretending to be someone.
6. Made a mistake? Tell [OWNER] right away. Don't delete it first. No blame for reporting.

# The 30-Day Rollout

The goal of the 30 days is not "use A.I. for everything." It's to find **three to five jobs** where A.I. clearly helps your business, make them routine, and drop the rest. About 20–40 minutes a day.

## Week 1: Baseline and setup

| Day | Task                                                                                                                                                                                                                                             | Done when                              |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| 1   | Fill in <b>Worksheet A (Task Inventory)</b> : list 15 recurring tasks, time per week, and annoyance level                                                                                                                                        | 15 tasks listed                        |
| 2   | Pick your <b>top 5 candidates</b> : frequent, mostly writing, reading or organizing, and low risk if a draft is imperfect                                                                                                                        | 5 tasks circled                        |
| 3   | Start the <b>Worksheet B trial log</b> : time each candidate task the normal way (aim for 3 comparable examples per task over the week)                                                                                                          | First timings recorded                 |
| 4   | Choose your tool(s) using Chapter 3. Create the account(s) (Setup Steps 1–2) and run the verification checklist                                                                                                                                  | Accounts secured and settings recorded |
| 5   | <b>Gate</b> : edit and approve the policy (Chapter 5), fill in <b>Worksheet C (Tool Register)</b> , and have every pilot user read and sign it. Until this is done, use only made-up practice examples, with no real business information at all | Policy signed by pilot users           |
| 6   | Write your <b>Business Profile</b> (Setup Step 4) and save it as standing instructions                                                                                                                                                           | Profile saved                          |
| 7   | Rest, or read Chapter 2 again with your team                                                                                                                                                                                                     | n/a                                    |

## Week 2: First wins

| Day | Task                                                                                                                 |
|-----|----------------------------------------------------------------------------------------------------------------------|
| 8   | Task #1: run a starter prompt from Chapter 7. Edit the output. Save the final prompt to your library                 |
| 9   | Task #1 on a real case (allowed now that the policy is signed; follow the data traffic light). Log it in Worksheet B |
| 10  | Task #2: same process                                                                                                |
| 11  | Task #2 on a real case, timed                                                                                        |