Released Solutions

Start With AI Safely

A 30-day checklist for small business owners

Business | **Start date** | **Pilot lead**

One task to test | **Reviewer**

01 Pick one starting task

- [ ] List three recurring tasks that take time.
- [ ] Pick one that uses public or approved information.
- [ ] Record the usual time before testing AI.

02 Choose the tool

- [ ] Choose an approved tool and company account.
- [ ] Check training, retention, and sharing settings.
- [ ] Enable two-factor login. Try it before committing.

03 Protect your data

- [ ] Keep passwords, API keys, and login codes out.
- [ ] Exclude tax IDs, payment data, and client records.
- [ ] Use placeholders. Keep private contracts out.

04 Put a person in charge

- [ ] Check each draft before a customer sees it.
- [ ] Confirm facts, dates, prices, and tone.
- [ ] Keep final high-stakes decisions with people.

05 Set team rules

- [ ] Write down the tool, task, and prohibited data.
- [ ] Agree on who reviews work and handles questions.
- [ ] Give the team time to practice the one task.

06 Be clear with customers

- [ ] Identify chatbots and offer a route to a person.
- [ ] Use authentic customer reviews and work photos.
- [ ] Check the rights to any material you use.

07 Measure after 30 days

Before (minutes per week) | **After (minutes per week)** | **Minutes saved per week**

Errors caught | **Setup time (minutes)** | **Monthly tool cost ($)**

Customer feedback or quality notes

Decision and reason (keep, adjust, or stop)

08 Expand slowly

- [ ] Add one task at a time if the pilot worked.
- [ ] Review tools, privacy and access quarterly.

Before using sensitive data or AI for regulated work, get advice from a qualified professional.

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