Team AI Starter Kit

A plain-language AI use guideline, a use-case worksheet, and a 30-day pilot plan, by David Hanscom · AI speaker and educator · davidhanscom.com

The goal is a team that uses AI confidently, protects what matters, and keeps people at the center of the work.

How to use this kit

1. Hold a 30-minute team conversation using the starter questions in Part 4.
2. Fill in the guideline in Part 1 together.
3. Complete the worksheet in Part 2 and choose your top three pilot ideas.
4. Run the 30-day pilot in Part 3, then review and adjust.

Everything below is a template. Replace the **[brackets]** with your own details and edit anything that does not fit your team.

Part 1: Our AI Use Guideline

Company / team: [name] **Owner of this guideline:** [name] **Last reviewed:** [date] **Next review:** [date, about 90 days out]

Why we use AI

We use AI to [save time on repetitive work / improve the quality of our drafts / free up time for clients and creativity]. AI supports our people. It does not replace their judgment, creativity, or care for the people we serve.

Approved tools

Tool	What we use it for	Who has access
[Tool name]	[Drafting, summarizing, brainstorming]	[Everyone / specific roles]
[Tool name]	[Use]	[Who]

What AI is great for here

- First drafts of emails, proposals, and social posts
- Summarizing long documents and meeting notes
- Brainstorming ideas, names, and options
- Organizing information and building checklists
- Explaining unfamiliar topics in plain language

What stays with people

- Final decisions and approvals
- Sensitive conversations with clients, guests, and teammates
- Anything that needs our personal relationships or local knowledge
- Final review of everything that leaves our company

Protect our information

Never paste into an AI tool:

- Passwords, access codes, or payment details
- Private personal details about clients, guests, or employees
- Confidential contracts, financials, or anything covered by an agreement
- [Add anything else specific to your business]

When unsure, ask [name / role] before pasting.

Always review

Every AI-assisted piece is reviewed by a person before it is sent or published. Check names, dates, numbers, and claims. AI can sound confident and still be wrong.

Be open about it

We are honest about our use of AI when asked. When AI materially shaped a deliverable, we [tell the client / note it internally].

Questions and concerns

Bring them to [name / channel]. We would rather talk about a question early than fix a problem later.

Signed off by: [name, role] *Date:* [date]

> **Please note:** This template is a starting point, not legal advice. Have your own counsel review it, especially if you handle regulated, confidential, or client-owned information.

Part 2: Use-Case Worksheet

List the tasks your team repeats. Score each from 1 (low) to 5 (high), then total the last column.

Task	Hours per month	Time saved potential (1-5)	Ease of starting (1-5)	Risk if wrong (5 = low risk)	Total
[Example: First draft of client follow-up emails]	[6]	[4]	[5]	[4]	[13]

How to choose: Pick the three highest totals. Start with tasks where a mistake is easy to catch and fix.

Our top three pilot ideas

1. [ ]
2. [ ]
3. [ ]

Part 3: 30-Day Pilot Plan

Week	Focus	What we do
1	Set up	Choose tools, share the guideline, write a shared background paragraph about the company's voice and audience.
2	Try	Each person tests the pilot tasks and logs time spent before and after.
3	Share	Hold a 30-minute show-and-tell. Collect the best prompts in one shared document.
4	Review	Tally results, update the guideline, and decide what to keep, change, or drop.

Measures of success

- Time saved per task: [target]
- Quality check: [Does the output need fewer edits?]
- Team comfort: [Quick 1-5 rating from each person]
- Issues raised: [Any privacy or accuracy concerns? How were they handled?]

Pilot log

Date	Person	Task	Time before	Time after	Notes

Part 4: Team conversation starters

Use these in your kickoff meeting. Take notes and keep the tone curious.

1. Which parts of our work do we love, and want to protect for people?
2. Which tasks drain our energy and feel repetitive?
3. What worries us about using AI, and what excites us?
4. What information must stay private, no matter what?
5. How will we check AI's work before it reaches a client?
6. Who can we ask when something feels unclear?
7. What would a win look like 30 days from now?

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