How to write a staff AI use policy

In plain English

Set clear rules for data, decisions and approvals.
Includes a two-page policy template.

What's inside.

For leaders of businesses with 50 to 500 people. Use the framework, then use the worksheet to draft your policy.

01

Understand

Why now 03

Three questions 04

02

Set limits

Traffic-light rule 05

Tool, data and task 06

Levels of AI use 07

03

Write

Eight sections 08

Approval path 09

04

Roll out

First four weeks 10

What to hand staff 11

Policy worksheet 12–13

READING TIME Set aside 12 minutes, then bring the template to a conversation with the policy owner.

Your staff already use AI.

Many staff use their own accounts. A short policy gives people a clear rule before customer information ends up in the wrong place.

68%

of Australian workers use AI at work. Only 35% have had formal training.

EY · Australian AI Workforce Blueprint, Aug 2025

56%

of Australian workers who use AI rely on tools their employer hasn't approved.

Salesforce · AI Use and Preferences, Australia, May 2026

1 in 3

Australian workers use AI without employer knowledge.

Employment Hero · AI Paradox at Work 2026

12%

worry about breaking data or regulatory rules when using AI at work.

EY · Australian AI Workforce Blueprint, Aug 2025

THE LESSON

Your policy makes clear which tools people can use, what they can share and when to ask.

Three questions for any AI policy.

Answer in the language staff use at work. Write examples they can apply on Monday morning.

01

What can staff use AI for?

- Name the approved tools.
- Give examples for each team.
- Say which tasks need approval.

02

What can AI read or use?

- Specify which data can go in.
- List the connected systems.
- Name who approves further access.

03

When does a person check?

- Say which outputs need review.
- Set disclosure and decision limits.
- Give staff a route to report issues.

MESSAGE TO STAFF

We want you using AI. Here's how to use it safely, well and in the open.

One colour.
One next step.

Each use falls into one category. Teach staff what to do next with examples they recognise.

GREEN

Go ahead

Use an approved tool with permitted data. No extra sign-off.

- Brainstorm ideas or outline a presentation
- Draft a generic email or edit your writing
- Summarise public information

AMBER

Ask first

Get approval for sensitive information or a process that affects customers.

- Analyse customer or financial records
- Connect a tool to the CRM
- Use a recording or launch a chatbot

RED

Never

Prohibited uses should be clear and specific.

- Share passwords or confidential records
- Impersonate a real person
- Let AI decide on hiring, pay or dismissal

MAKE IT SPECIFIC

A task can move from green to amber or red when the data, the tool or the way the result is used changes.

The combination sets the risk.

The task stays the same. The data and tool change what your policy allows.

FIXED TASK		DATA AND TOOL		COLOUR AND ACTION
Summarise themes	+	**Anonymous responses** Approved work assistant	=	**Green · Go ahead** No extra approval needed.
Summarise themes	+	**Named complaints and order details** Approved work assistant	=	**Amber · Ask first** Get the privacy lead's approval.
Summarise themes	+	**Complaints containing access keys** Unapproved personal chatbot	=	**Red · Never** Remove secrets and use an approved tool.

RULE OF THUMB

Ask first if the data identifies someone. Stop if the data or tool is prohibited.

More access, more checks.

Match sign-off to what AI can see and do. Everyday drafting needs fewer checks than a workflow that takes action.

LEVEL 01	**Everyday AI assistance** Drafting, research and summaries.	**WHO APPROVES** Standard access	**CONTROLS** Approved tools, permitted data and human checks.
LEVEL 02	**AI-powered workflows** AI reads internal data, runs recurring tasks or connects to systems.	**WHO APPROVES** Manager and IT	**CONTROLS** Review data access, test with an owner and document human checks.
LEVEL 03	**AI that takes action** Customer-facing voice agents, financial processing and other consequential tasks.	**WHO APPROVES** Formal sign-off	**CONTROLS** Risk assessment, monitoring, audit trail, escalation and an off switch.

SET YOUR OWN LIMITS

These are internal approval levels. Adapt them to your business and industry.

Eight sections. Five to eight pages.

Make the policy short enough to read in one sitting. The worksheet follows the same eight sections.

01
Purpose and scope

Why you encourage AI, who the rules cover and what counts as AI.

02
Approved tools

Which tools staff can use and how they can request a new one.

03
Acceptable use

Green, amber and red examples for each team.

04
Data and privacy

What staff may share, upload or connect to AI.

05
Human oversight

What a person checks and which decisions stay with them.

06
Transparency

When to tell customers, candidates or staff about AI use.

07
Agents and automation

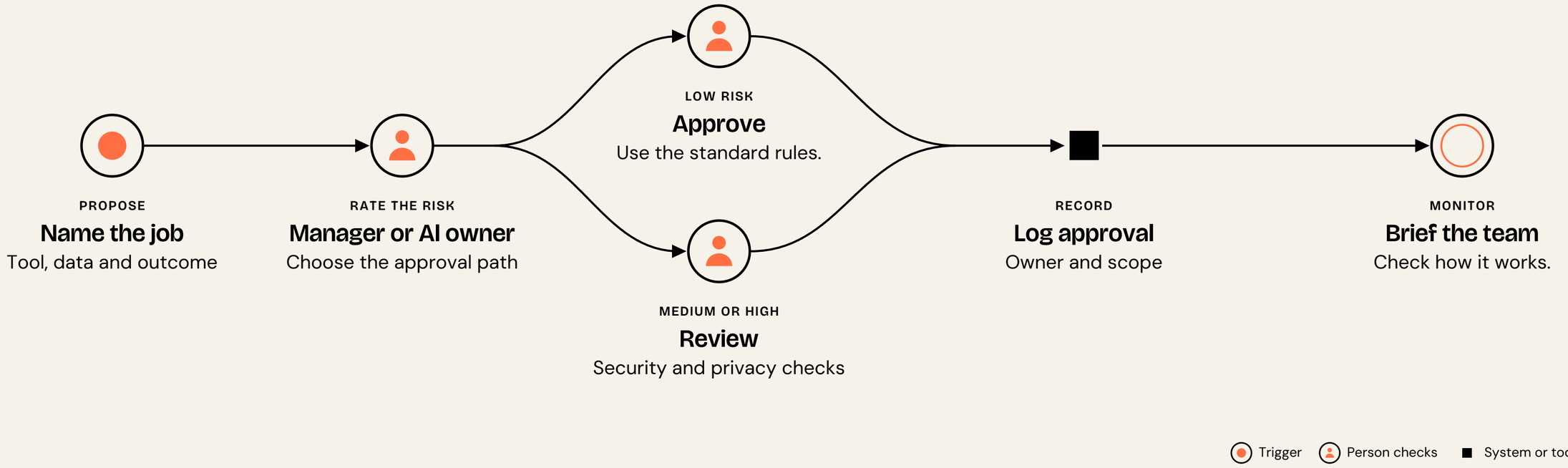
Rules for AI that reads systems, sends messages or acts.

08
Governance and incidents

Who owns the policy, runs training and handles mistakes.

A simple approval path.

Use the same steps for every request. Add a deeper review when the data, the audience or the action makes it necessary.



KEEP AN AI REGISTER

Record each tool, owner, data, limits and review date.

Your first four weeks.

Start by finding the AI tools and habits your team already uses. Publish examples staff can apply that same day.

WEEK 01

Discover

Survey teams. List tools in use, identify sensitive data, and name one policy owner.

WEEK 02

Draft and approve

Agree on the traffic lights and list approved tools. Ask legal, privacy and security to review.

WEEK 03

Train and share

Run a short session. Put the rules where people work, with examples for each team.

WEEK 04+

Monitor usage

Review requests, exceptions and incidents. Revisit the policy every six months.

TEST THE RULES Give two colleagues the same scenario. If their answers differ, make that rule more specific.

What staff need after launch.

Give the team the rules, a short reference and a way to raise questions when the policy needs to change.

01

AI use policy

Five to eight pages of approved rules, signed by an accountable executive.

02

Quick reference

One page of green, amber and red examples, posted where people work.

03

Governance toolkit

A tool request form, risk check, AI register and incident procedure.

START WITH THE TEMPLATE

Two pages. Eight sections.

Use the example to see how the rules work in practice. Then fill in the blank version with the policy owner.

MAKE THE REFERENCE

Use box 03 to create the traffic-light reference for staff.

STAFF AI USE POLICY

Set the rules.

Make them easy to use.

Use these four sections to set the ground rules for staff tools, information and approvals.

HOW TO USE IT

01 Start with the traffic-light rules.

02 Invite one person from each team.

03 Name the tool, data and approver.

04 Have the draft checked before release.

CONTINUE THE WORKSHEET

Set owners and approvals, then decide how to publish the policy.

ORGANISATION	POLICY OWNER	EFFECTIVE DATE	NEXT REVIEW

Purpose and scope

01 · SCOPE

Say why you use AI, who the policy covers and which tools count.

Approved tools

02 · TOOLS

List each tool, what staff can use it for and the level.

TOOL	PERMITTED USE	LEVEL

Acceptable use

03 · THE TRAFFIC LIGHTS

Give examples that staff in each team will recognise.

GREEN · GO AHEAD	AMBER · ASK FIRST	RED · NEVER

AMBER APPROVER _____

Data and privacy

04 · INFORMATION

Mark each type of information Green, Amber or Red for approved tools.

TYPE OF INFORMATION	COLOUR	CONDITIONS OR APPROVER
Public information		
Internal documents and plans		
Customer personal information		
Staff records, pay and health		
Financial records and pricing		
Passwords, keys and access		

STAFF AI USE POLICY

Make it work.

Keep it up to date.

Name who handles AI checks, disclosures, approvals and incidents after launch.

BEFORE YOU PUBLISH

01 Test the rules with two people.

02 Give staff a quick-reference page.

03 Start a register for tools and owners.

04 Review after incidents and new tools.

ORGANISATION	APPROVED BY	NEXT REVIEW	VERSION

Human oversight

05

Which outputs does a person check? Set the decision limits.

DECISIONS THAT STAY WITH PEOPLE

Transparency

06

When do you disclose AI use, and what should staff say?

AUDIENCE	WHEN	WORDING
Customers		
Candidates		
Staff		
The public		

Agents and automation

07

Start with read-only access. Add one action at a time.

USE	LEVEL	APPROVED BY	CAN SWITCH IT OFF

Governance and incidents

08

Give staff a route for new requests and a way to report mistakes.

REQUEST	CONTACT	CHANNEL	REPLY WITHIN
New use			
Report a mistake			

TRAINING

Sign-off and acknowledgement

The accountable executive signs. Staff acknowledge the policy.

NAME AND ROLE	SIGNATURE	DATE

Review and register

Review every six months and after an incident, new tool or change in law.

REVIEW DATE

POLICY OWNER

AI REGISTER

We build AI workflows.

We run them, too.

Spark Factory finds, builds and runs AI workflows for growth companies. We take on one workflow at a time, with a result your team can measure.

01

Find.

Find the repeatable job where AI can improve cost, speed or quality.

02

Build.

Build into the tools you use and test against real work. Fixed price, live in four weeks from sign-off.

03

Run.

Monitor, support and improve the workflow while it runs, for one monthly fee.

YOUR NEXT STEP

Bring one workflow.

Show us one job your team repeats. We'll help you choose the first workflow to trial.

Scan to book a call.

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