# 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 see how a team used the worksheet.


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

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04

**Roll out**

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Worked 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**<br>Approved work assistant | = | **Green · Go ahead**<br>No extra approval needed. |
| **Summarise themes** | + | **Named complaints and order details**<br>Approved work assistant | = | **Amber · Ask first**<br>Get the privacy lead's approval. |
| **Summarise themes** | + | **Complaints containing access keys**<br>Unapproved personal chatbot | = | **Red · Never**<br>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**<br>Drafting, research and summaries. | **WHO APPROVES**<br>Standard access | **CONTROLS**<br>Approved tools, permitted data and human checks. |
| **LEVEL 02** | **AI-powered workflows**<br>AI reads internal data, runs recurring tasks or connects to systems. | **WHO APPROVES**<br>Manager and IT | **CONTROLS**<br>Review data access, test with an owner and document human checks. |
| **LEVEL 03** | **AI that takes action**<br>Customer-facing voice agents, financial processing and other consequential tasks. | **WHO APPROVES**<br>Formal sign-off | **CONTROLS**<br>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

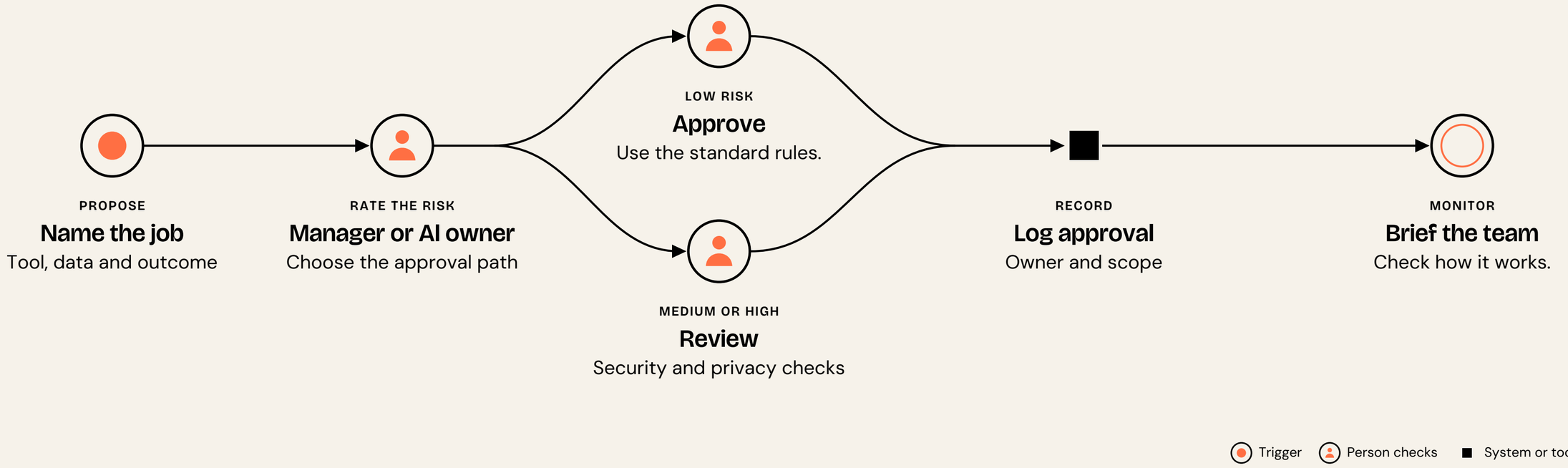
Rules for AI that reads systems, sends messages or acts.

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 |
|---|---|---|---|
| Wattle Quay Services | Dana Lee, Operations | 17 May 2027 | 17 November 2027 |

## Purpose and scope

01 · SCOPE

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

Reduce admin time and keep staff accountable. Applies to staff, contractors and approved tools. A person approves customer-facing output.

## Approved tools

02 · TOOLS

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

| TOOL | PERMITTED USE | LEVEL |
|---|---|---|
| Copilot (work tenant) | Draft internal SOPs and emails | 1 |
| CRM draft assistant | Draft quote follow-ups; review first | 2 |
| Booking voice agent | Approved after-hours changes | 3 |

## Acceptable use

03 · THE TRAFFIC LIGHTS

Give examples that staff in each team will recognise.

| GREEN · GO AHEAD | AMBER · ASK FIRST | RED · NEVER |
|---|---|---|
| Summarise public supplier guides.<br>Draft internal checklists. | Draft CRM emails.<br>Use de-identified support tickets. | Paste passwords or medical records.<br>Send unreviewed quotes. |

**AMBER APPROVER** Operations lead

## 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 | Green | Approved tool only |
| Internal documents and plans | Green | No confidential HR records |
| Customer personal information | Amber | Approved CRM; Ops approval |
| Staff records, pay and health | Red | Keep out of AI tools |
| Financial records and pricing | Amber | Finance approves limited use |
| Passwords, keys and access | Red | Never share or paste |

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 |
|---|---|---|---|
| Wattle Quay Services | Mia Chen, GM | 17 November 2027 | 1.0 |

## Human oversight

05

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

Check customer replies against the job record and approved wording. A dispatcher approves booking changes.

**DECISIONS THAT STAY WITH PEOPLE**

Hiring, pay, refunds and safety. A person approves prices and any exception to policy.

## Transparency

06

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

| AUDIENCE | WHEN | WORDING |
|---|---|---|
| Customers | AI answers a live call | You're speaking to our AI assistant. |
| Candidates | AI screens an application | A person makes the decision. |
| Staff | AI informs a staff decision | We'll explain how AI was used. |
| The public | AI-generated public copy | Disclose when it helps the reader. |

## Agents and automation

07

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

| USE | LEVEL | APPROVED BY | CAN SWITCH IT OFF |
|---|---|---|---|
| Quote follow-up drafts | 2 | Operations lead | CRM admin |
| Booking change calls | 3 | GM and service lead | Duty manager |

## Governance and incidents

08

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

| REQUEST | CONTACT | CHANNEL | REPLY WITHIN |
|---|---|---|---|
| New use | Operations lead | Teams: AI register | 1 business day |
| Report a mistake | Duty manager | Service desk | Within 1 hour |

**TRAINING** 15-minute toolbox talk and two practice scenarios

## Sign-off and acknowledgement

The accountable executive signs. Staff acknowledge the policy.

| NAME AND ROLE | SIGNATURE | DATE |
|---|---|---|
| Mia Chen, GM | M. Chen (example) | 17 May 2027 |
| Dana Lee, Operations | D. Lee (example) | 17 May 2027 |

## Review and register

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

**REVIEW DATE** 17 November 2027

**POLICY OWNER** Dana Lee, Operations

**AI REGISTER** SharePoint / 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.**

**www.sparkfactory.ai**

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