Herzog | Consulting

TEMPLATE · AI POLICY

AI ground rules for our team

This template helps you set binding rules for the use of AI tools in a short time. The sample texts are suggestions: delete, add and adapt as you see fit.

COMPANY	VALID FROM	RESPONSIBLE

1 Purpose and scope

We use AI tools to make routine work easier and achieve better results. These ground rules ensure that we do so safely and responsibly. They apply to all employees, trainees and freelancers.

2 Approved tools

These tools may be used. New tools must be requested from the responsible person before use.

TOOL	ACCESS	WHAT FOR?
e.g. Microsoft 365 Copilot	Company account	Texts, summaries

3 Data: what may go in and what may not

If in doubt, treat it as red. We agree this traffic light with our data protection officer.

Green may be entered	public information, general questions, your own texts without personal data
Amber only in approved company tools	internal processes, anonymised examples, drafts without names
Red never enter	personal data of customers and staff, credentials, contracts, financial figures, trade secrets

4 Check results

AI can be wrong. A human checks results before use, especially figures, facts, quotations and legal statements. Whoever uses a result is responsible for it.

5 Labelling

We disclose when customers are communicating with an AI (e.g. a chatbot) or when images and texts for the public were created mainly with AI.

6 Responsibility and contact person

Contact person for questions, new tools and maintaining these rules:

7 Training and updates

All users receive an introduction. We review these rules at least once a year and whenever a new tool is added. Next review:

I have read the AI ground rules and will follow them.

Name | Date | Signature