

AI policy for [your firm]

Fill in the parts in square brackets, then talk it through with your team before anyone signs.

Firm		Version	
Agreed on		Next review	

1. Purpose

This policy explains how people at [your firm] may use AI tools at work, so we get the benefit without putting client information, safety or quality at risk.

2. Who it covers

Everyone who works for [your firm], including subcontractors using our systems.

3. Approved tools

- Use only the tools listed here: [your approved tools, for example Microsoft Copilot through your Microsoft 365].
- Use your work account, never a personal one.
- Ask [name or role] before trying anything else.

4. Never put into AI

- client prices and our own pricing;
- contract documents marked confidential;
- personal details of staff, clients or members of the public;
- passwords;
- anything a client has asked us to keep private.

5. Use with care

Drawings, specifications and project correspondence may go into approved tools only.

6. Checking AI work

- Treat anything AI produces as a first draft.
- The person who uses it is responsible for checking it.
- Method statements, risk assessments and anything safety-related must be checked against the site and signed by a competent person.
- Contract letters and anything sent to a client must be read in full by the person sending it.

7. Personal data

UK data protection law applies when AI tools process personal data. If in doubt, leave personal details out and ask [role].

8. Being open

If a client asks whether AI helped produce a document, tell them.

9. Mistakes

If AI work causes a problem, or something went into the wrong tool, tell [role] straight away. We'd rather know.

10. Review

[role] reviews this policy every six months, or sooner if our tools change.

Signed for [your firm]

Name	Role	Signature	Date

Staff confirmation

I have read this policy and will follow it.

Name	Signature	Date