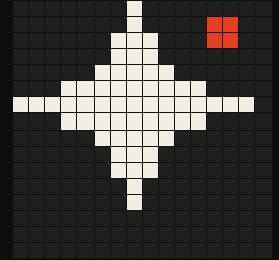


AI TOOL VETTING CHECKLIST

Start small, specific and measured: one routine task, a person checking every result, and an honest decision after a few weeks. Use this to choose the task, protect your data and question vendors.

variance ■

[Read the full guide online ↗](#)



01 PICK YOUR FIRST TASK

TASK	TIME IT TAKES EACH WEEK	CAN A PERSON CHECK THE RESULT?	COST OF A MISTAKE

02 BEFORE YOU PASTE ANYTHING

- ☐ Read the terms of the plan you actually use, including whether data trains models
- ☐ Kept sensitive information out of tools you haven't checked
- ☐ Removed names and details the task doesn't need
- ☐ Checked what data protection law says about sharing personal information
- ☐ Wrote a short policy for the team

03 YOUR ONE-PAGE AI POLICY

Tools we've approved:

Never put into them:

Always checked by a person before it's sent:

04 FOR A CUSTOMER-FACING ASSISTANT

- ☐ It answers only from our approved information
 - ☐ We've listed what it must never do (refunds, advice, made-up order status)
 - ☐ There's always a clear, easy way to reach a person
 - ☐ Customers are told it's automated
 - ☐ Tested with real, awkward questions before launch, and re-tested after changes
 - ☐ We read a sample of conversations regularly
 - ☐ Spending limits are set and monitored
-

05 QUESTIONS FOR ANYONE SELLING YOU AI

- 01 What specific task does it do, and how will we measure whether it's working?
 - 02 Where does our data go, and is it used to train anything?
 - 03 What happens when it's wrong? How will we know?
 - 04 What stops it from making things up or promising things we don't offer?
 - 05 How do customers reach a person?
 - 06 What does it cost to run each month as usage grows?
 - 07 If the AI service changes its prices or shuts down, what happens to our system?
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