

G3 — Your Shadow AI Policy

Week 1 • Async Build • About 40 minutes • Output: a one-page acceptable-use policy, shipped

WHY THIS MATTERS

78% of employees use AI tools their company never approved. Not maliciously — practically. The tool helped, so they used it. A policy is not bureaucracy; it is the difference between your team guessing and your team knowing. One page. Plain language. Shipped this week. **Running solo?** Your “team” is every contractor, VA, and bookkeeper who touches your data — the policy goes into their onboarding.

The One-Page Policy — fill it in

Everything below fits on one page. The approved tools come from your G2 verdicts. The data rules come from your G1 map. Keep the language plain — this will be read by people who will never open a compliance manual.

1. Approved tools

Tool	Approved for data up to	Account type	Limits
	Tier ____	☐ Business ☐ Personal	
	Tier ____	☐ Business ☐ Personal	
	Tier ____	☐ Business ☐ Personal	
	Tier ____	☐ Business ☐ Personal	
	Tier ____	☐ Business ☐ Personal	

2. Data rules

Tier 1 — confidential (for us that includes: _____) never enters an AI tool except those approved for Tier 1 above. Tier 2 — internal work product: approved tools only, business accounts only. Tier 3 — public and shareable: any reputable tool.

3. Never — regardless of tool

- ☐ Client names or personal information into any tool not approved for Tier 1
- ☐ Contracts or legal documents into any tool without a signed Data Processing Agreement
- ☐ Passwords, credentials, or API keys into any AI tool, ever
- ☐ Financial exports into personal or free-tier accounts
- ☐ Our addition: _____

4. New tools

Want to use a tool that is not on this list? Ask _____. They run the four-question vendor check (G2) and answer within ____ days. Until then, the tool stays off company data.

5. If something goes wrong

Tell _____ within 24 hours. No blame attaches to the report — blame attaches to the silence. We fix the exposure first and the process second.

6. Review

This policy is reviewed every ____ months by _____. Last updated: _____

Policy owner: _____ Date: _____

Ship it

- ☐ Sent to every person who touches business data — team, VA, bookkeeper, contractors
- ☐ Added to contractor / employee onboarding
- ☐ Saved where your team actually looks — not buried in a folder no one opens
- ☐ Truly solo, no contractors? File it in your onboarding pack — your first hire inherits it on day one

THIS WORKSHEET IS DONE WHEN

- ☐ The policy is one page or less and reads aloud without translation
- ☐ It has a named owner and a review cadence
- ☐ It has been shipped to at least one real person — or filed in onboarding if no one else touches your data yet

Where this goes next: This is one of the two Week 1 outputs, alongside your G1 Data Map. A clause that fought you is worth bringing to the Friday office hour — the fight usually marks a real decision.