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.

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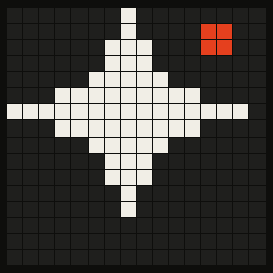
Read the full guide online ↗



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?