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FREE RESOURCE

AI Governance Starter Kit

Know your tools, your rules, and your data.

A two-page fill-in guide for small business owners. It covers the first things to look at, whether you work alone, run a team, or work inside someone else's business.

AI is already in your business, whether you planned it or not. Someone is drafting emails in ChatGPT, summarizing notes in Copilot, or asking Claude to write a quote. Governance just means deciding, on purpose, which tools you use, how they are set up, how your business sounds, and where your customers' information lives. Start simple. You can build on it later.

01 Where do you fit? Your role changes what you are responsible for.

Solo owner

You are the whole policy. Pick your tools, set them up properly, and write down your rules so you follow them on busy days too.

Owner with a team

You own the rules for everyone. Decide the approved tools, who reviews AI work, and what happens when someone joins or leaves.

Working in a business

Your employer may already have an AI policy. Find it first. Use only approved tools and keep personal accounts away from customer work.

I am a: ☐ Solo owner ☐ Owner with a team ☐ Working in a business AI policy exists? ☐ Yes ☐ No / not sure

02 What AI tools are in use? List every tool, including free ones and browser add-ons.

Tool	Who uses it	Plan (personal or business)	Training off	2-step login on	Customer info allowed?
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	

03 Check your security settings The obvious ones first. Menu names change, so check the help pages.

Claude
Settings > Privacy > turn off **Help improve Claude** on Free, Pro, and Max plans.

ChatGPT
Settings > Data controls > turn off **Improve the model for everyone**.

Gemini
Activity settings > turn off **Keep Activity** (also called Gemini Apps Activity).

Microsoft Copilot
Profile > Privacy > turn off model training for conversations and voice.

- ☐ Customer work happens on business plans (e.g., Claude Team, ChatGPT Business)
- ☐ Two-step login is on for every AI and email account
- ☐ Personal and business accounts are kept separate
- ☐ Connected apps (email, Drive, calendar) are reviewed; only what is needed is on
- ☐ Temporary or incognito chats are used for anything sensitive
- ☐ Settings checked every quarter by: _____

04 Give your business a persona

You have a voice. So should the business.

Your business persona is how the business sounds in every email, quote, post, and AI draft, no matter who on the team writes it. Pair it with a short set of house rules so everyone, and every AI tool, follows the same playbook.

Our business sounds like: _____

We always: _____

We never: _____

AI drafts are approved by: _____

- ☐ No customer names or personal details go into personal AI accounts
- ☐ A person reads every AI draft before it reaches a customer or the public
- ☐ AI never invents prices, promises, facts, or deadlines
- ☐ Industry rules and must-say wording are written into the persona itself

05 What are we doing with our data?

Customer information is one of the most valuable things you hold.

In Canada, customers' personal information is covered by privacy law (PIPEDA, plus any rules for your industry). Know where it lives, who can reach it, and what any AI tool can see.

Customer files are stored in: _____

Stored in: ☐ Cloud ☐ Local ☐ Both ☐ Not sure

Backed up to / how often: _____

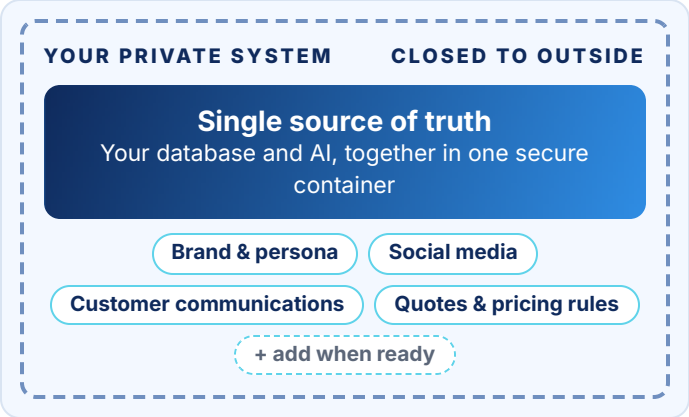
AI tools that can see customer data: _____

Who has access: _____

When someone leaves, we: _____

06 Build it simple: one source of truth

The approach BotLogix recommends.



Most small businesses end up with information scattered across inboxes, drives, and a handful of AI chats. A better starting point is one central place for your business knowledge: your persona, your rules, your processes, and your approved content.

We set this up as a self-contained system (for example, a database running in a Docker container) that only you control and that is closed off from the outside world. The AI works inside it, so your information stays in.

Because everything draws from the same source, you can add pieces over time, such as brand, social media, customer communications, and pricing rules, without starting over.

Your first six moves

- ☐ Fill in the tool list on page 1
- ☐ Turn off model training on every personal AI account
- ☐ Move customer work to a business plan
- ☐ Write your business persona and five house rules
- ☐ Map where your customer data lives and who can see it
- ☐ Book a review date: _____

Please note: This is a high-level starting point, not a complete or comprehensive list, and it is not legal, privacy, or compliance advice. Settings and menu names change often. Business owners remain responsible for Canadian privacy law and any rules that apply to their industry.