YOUR TAKE-HOME RESOURCE

Build Your AI Guardrails

Answer what you know. Let AI build what you don't.

You already know your business better than any consultant. What you don't know is what a policy, an SOP, or an AI training guide is supposed to say. This guide bridges that gap. You fill in what only you can answer. Then one prompt turns your answers into the documents you didn't know you needed — written for a business your size.

STEP 1 The Five Questions to Ask Before You Type

These travel with you into any AI tool — the ones you use today and the ones that don't exist yet. Ask them every time, until they become a habit.

1. **Would I be comfortable if this showed up in a lawsuit?**
   Your AI chat history is a business record. It is discoverable, the same as email.
2. **Is this tool training on what I type?**
   Every major tool now has a setting to turn this off. Find it. Do not assume your plan did it for you.
3. **Is this my intellectual property going in unprotected?**
   AI-generated work has no copyright protection. Label your IP as yours, on the way in.
4. **Is a real person's data in here?**
   Client names, customer emails, financials — the moment someone else's data goes in, you have an obligation.
5. **Is this AI about to act, or just advise?**
   The moment it acts as you — sending, posting, replying — your exposure changes completely.

> ✓ **The one setting to change today**
>
> In every AI tool you use, go to Settings → Data Controls (or Privacy).
>
> Turn off "use my data to train the model," or "improve the model for everyone."
>
> The name is different in every tool and changes often. The setting is almost always there. Go find it.

STEP 2 Answer What Only You Know

Fill these in. Be specific — "my process" is not an answer; "my five-step client onboarding framework" is. Your answers here become the raw material for the prompt in Step 3. Nothing you write is wasted.

A · MY BUSINESS

My business does:

I am solo / I have a team of:

We sell mostly a product / a service (circle one) — specifically:

B · WHAT IS MINE TO PROTECT

Frameworks or methods I created:

Content that is my IP (curriculu

C · THE DATA I HANDLE

Client / customer data I collect:

Financial or payroll data in my systems:

D · HOW I USE AI TODAY

The AI tools we use:

People (or contractors) with AI access:

Anything AI does that ACTS on my behalf (sends, posts, replies):

E · WHAT I NEED BUILT

Check the documents you want. The prompt in Step 3 will generate every box you check.

☐ **An AI Acceptable Use Policy** — plain-language rules my team can actually follow

☐ **An IP Protection Protocol** — what we never put into AI, and how we label what we do

☐ **An Agent Governance Checklist** — what must be true before AI communicates as my business

☐ **A Team Training One-Pager** — so everyone who touches AI knows the rules

STEP 3 Let AI Build What You Don't Know

Open a PAID AI tool with model-training turned off (see Step 1). Paste the prompt below. Replace each [bracket] with your answers from Step 2. Then let it build the documents you checked.

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You are a governance and compliance advisor for small businesses. I am not an enterprise —
write everything for a business of my size, in plain language I can actually use.


MY BUSINESS
What we do: [A]
Size: [SOLO / TEAM OF ___]
Product or service: [A]


WHAT IS MINE TO PROTECT
My frameworks / methods: [B]
My IP content: [B]
Tools or code I built: [B]


THE DATA I HANDLE
Client / customer data: [C]
Financial / payroll data: [C]


HOW WE USE AI
Tools we use: [D]
People with access: [D]
What AI does that acts for us: [D]


BUILD THESE FOR ME (only the ones I list):
[PASTE THE DOCUMENTS YOU CHECKED IN STEP 2 — E]


For each document: keep it to one page, use plain language, and at the end list what I am
risking if I ignore it. Then ask me the 3 most important questions you still need answered
to make these stronger.
```

Notice the last line. It asks the AI to interview you — to surface the questions you didn't know to ask. That is where it fills in what you don't know you're missing. Answer those questions, and your documents get sharper.

STEP 4 Make It Real

A policy in a chat window is not a policy. Do these four things before you close the tab.

✓ Before you close the tab

1. Copy every document into a file. Name it: AI-Guardrails_[YourCompany]_2026
2. Save it where your team can find it — not your desktop.
3. Send the training one-pager to everyone who touches AI. Today.
4. Put a calendar reminder 90 days out to review and update it — these tools change fast.

Want to go deeper? Your Compliance Cheat Sheet walks the exact six-tool workflow from today's session, tool by tool — what each one costs you and how to protect yourself. Scan the code from the session to get it.

You're going to use these tools anyway. The question is whether you still own what you built when you're done.

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