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AI Rules for Your Team



Shubham Bapna
Making AI easy and profitable for business owners

A ready-to-use AI policy for business owners. Fill in the brackets, print it, and share it with your staff.

Why your business needs AI rules now

Your team is probably already using AI. A sales executive drafts a reply on a free app on their phone. Someone in accounts pastes a supplier statement into a chatbot to "make sense of it". A showroom manager makes a festive poster with an AI image tool. Often, nobody has told them what is allowed.

That is not a reason to ban AI. It is a reason to set simple rules.

The Dun & Bradstreet Business Expectations Outlook 2026, a survey of 210 Indian MSME leaders, found that:

- **Only 17% have guardrails in place for AI use.**
- **53.4% trust AI output.**

Read those together. About half of the leaders surveyed trust what AI produces, yet most of the businesses surveyed have no rules on how it is used. AI can sound confident while getting a price or a date wrong. Without rules, a wrong answer reaches a customer, or a customer's phone number ends up in a tool nobody has checked.

Good rules do three things:

1. **Protect your customers and your business.** Personal data, bank details and confidential numbers stay out of AI tools.
2. **Protect your reputation.** A person checks everything before it reaches a customer, and you stay honest about AI-made images and content.
3. **Give your team confidence.** Staff who know what is allowed can use AI with confidence, instead of guessing or hiding it.

The policy that follows covers the six things that matter most, in plain English every staff member can follow.

How to use this policy

1. Replace everything in [square brackets] with your details.
2. Delete any line that does not apply to your business, and add any rule you need.
3. Read it out in a team meeting. Ask for questions.
4. Ask each staff member to sign the acknowledgement at the end.

5. Review it every [six months], or whenever you add a new AI tool.

Important: This template is a practical starting point, not legal advice. Laws on data protection, advertising and consumer rights apply to your business. Speak to a qualified lawyer or advisor if you handle sensitive data, work in a regulated sector, or are unsure about any rule.

[Company name] AI Use Policy

Effective from: [date] **Policy owner:** [name, role] **Applies to:** all employees, trainees, and anyone who works for [company name], including [freelancers / agencies / karigars / showroom staff].

1. Why we have this policy

[Company name] encourages the use of AI tools to save time and improve our work. We also have a duty to protect our customers, our suppliers and our business. This policy sets out how we use AI safely and honestly.

2. Approved tools

You may use only these AI tools for [company name] work:

Tool	Approved for	Account to use
[for example ChatGPT]	[drafting messages, summaries, translations]	[company account / personal account]
[for example Gemini or Claude]	[checking documents, planning]	[company account / personal account]
[AI image tool, if any]	[product backgrounds, social media graphics]	[company account]

- Do not use any other AI tool, app or browser extension for work without written approval from [policy owner].
- Where a tool lets you choose whether your chats are used to train its models, [set it so chats are NOT used for training / follow the setting decided by the policy owner].
- Do not connect AI tools to company email, WhatsApp Business, Tally, Excel files on shared drives, or marketplace seller accounts without approval.

3. What you must never paste into an AI tool

Never type, paste, upload or photograph any of the following into an AI tool:

- Customer names together with phone numbers, addresses or email addresses
- Bank details, UPI IDs, card details or payment screenshots
- Passwords, OTPs or login details of any kind
- GST numbers, PAN, Aadhaar or other ID documents of customers, suppliers or staff
- Employee personal data, salaries, appraisals or health information
- Supplier contracts, pricing agreements or credit terms
- Unreleased financial results, margins or business plans
- Designs, product photos or catalogues that have not yet been launched, unless approved by [policy owner]
- Anything a customer or supplier has asked us to keep confidential

If you need AI help with a customer message, replace personal details first. Write "Customer A" instead of the name. Remove the number and address.

If you are unsure, do not paste it. Ask [policy owner] first.

4. A human checks before anything goes out

AI can be wrong while sounding certain. So:

- **Every message, quote, invoice, listing, post, email or document that goes to a customer, retailer, supplier or the public must be read and approved by a person before it is sent.**
- Check every price, quantity, date, weight, purity, size, tax amount and total against our own price list, Excel sheet or Tally. Never trust AI maths.
- Check that every product claim is true. Remove anything the AI added that we cannot prove, such as "best quality", "No. 1", certifications or guarantees we do not offer.
- Do not use AI to give customers legal, tax, medical or financial advice.
- For [quotes above Rs [amount] / complaints / legal or payment matters], the message must also be approved by [role].

5. AI images, videos, voices and disclosure

We are honest with our customers about how our content is made.

- **Products must look the way they are.** AI can change backgrounds or settings, but must never change a product's colour, size, design, finish or quality in a way that misleads the buyer.

- **Real people need consent.** Never create an AI image, video or voice of a real person, including staff, models, customers or celebrities, without their written consent.
- **No fake reviews or testimonials.** Never use AI to write reviews, ratings, customer quotes or testimonials, or to create images of "customers" who do not exist.
- **Label AI content where needed.** Follow the disclosure rules of each platform, such as Instagram, Facebook, Amazon and Flipkart, and of any advertising rules that apply. Where a post or ad uses AI-generated people or scenes, [add a label such as "Image created with AI" / follow the policy owner's guidance].
- Do not use AI to copy another brand's designs, photos, logos or written content.

6. Who owns AI decisions

- **[Name, role]** owns AI use at [company name]. This person approves new tools, updates this policy, and decides on any grey areas.
- **Team leads** ([list roles]) make sure their teams follow this policy.
- **Every staff member** is responsible for what they send, even if AI helped write it. "The AI wrote it" is not an excuse.
- Any new use of AI that touches customers directly, such as a chatbot, automated WhatsApp replies or AI-written product listings at scale, must be approved by [policy owner] before it starts.

7. When AI gets it wrong

Mistakes will happen. What matters is that we catch them early and learn from them.

If you notice an AI mistake before it is sent: fix it, and if it could happen again, tell [policy owner] so we can improve our prompts or checks.

If an AI mistake reaches a customer or the public:

1. Tell [policy owner / your team lead] the same day. Do not hide it.
2. Correct it with the customer quickly and politely. Our team lead will help with the message.
3. Remove or correct any post, listing or document that is wrong.
4. Note what happened in our [AI log / mistakes register]: what went wrong, how it was caught, and what we changed.

If you think customer or company data was pasted into an AI tool by mistake: tell [policy owner] immediately so we can take steps, such as deleting the chat and checking the tool's settings.

Nobody will be punished for reporting an honest mistake promptly. Hiding a mistake is a breach of this policy.

8. Breaking this policy

Breaking this policy, especially sharing customer or confidential data, may lead to [disciplinary action as per our staff rules / removal of access to AI tools].

9. Questions

Ask [policy owner name] on [phone or email]. If in doubt, ask before you act.

Staff acknowledgement

I have read and understood the [company name] AI Use Policy. I agree to follow it.

Name	Role	Signature	Date

This policy template is for general guidance only and is not legal advice. Adapt it to your business and take professional advice where needed.

About Shubham

Shubham Bapna is a second-generation jeweller from Mumbai. He runs Shree Taru Jewels, a 45-year family jewellery manufacturing and export house that sells to retailers; NEWDRU, a D2C consumer electronics and lifestyle brand selling on Amazon, Flipkart, Blinkit and through an experience centre in Chembur; and Siyaara, a silver and gold-polished silver jewellery brand. He leads Jewellery Sahi Hai, a jewellery industry coalition, and is a GJEPC 40 Under 40 recipient.

He is not a coder. Using AI tools, he has built AI model shots of real jewellery (a real model, with consent, digitally wearing real pieces), an AI-assisted video editing setup for his reels and scheduled social posting for several brands, and is building a website for

> Jain audio recordings, an order-booking app for gold and silver coins and a B2B jewellery catalogue and CRM app.

Follow @bapnadigital on Instagram and Shubham Bapna on LinkedIn for one practical AI system a week.