

AI Review + Approval Checklist

AI policy template for small businesses. Review with qualified counsel for regulated or high-risk use.

Use this checklist before sending, publishing, or relying on AI-assisted work.

Basic Review

- The output was reviewed by a human.
- The facts, names, dates, numbers, and details are accurate.
- The tone matches the company and the audience.
- The output is clear, useful, and not overly generic.
- The final version has been edited for the actual situation.

Data Protection

- No private customer data was entered into an unapproved AI tool.
- No employee, financial, health, legal, or confidential business data was exposed.
- Proprietary pricing, margins, vendor terms, and internal strategy were protected.
- Any sensitive document used with AI was handled in an approved system.

Business Judgment

- The output does not make an unauthorized promise, quote, discount, delivery date, or service commitment.
- The output does not provide legal, medical, financial, safety, or compliance advice without qualified review.
- Any recommendation has been checked against company policy.
- A manager approved the output when the business risk is material.

Customer-Facing Approval

- Customer-facing content is accurate and professional.
- The message answers the actual customer need.
- The message avoids unnecessary AI-sounding language.
- The sender is comfortable standing behind the final content.

Final Approver

Prepared by: _____

Reviewed by: _____

Date: _____