

STAFF AND MANAGER CHECKLIST • OCTOBER 2026

Rolling AI out safely

A checklist for getting AI into your business without a drama

THE SHORT ANSWER

Pick the jobs first. Set the rules before the tool. Start with a small group, then roll it out team by team. Tick every box before you hand out licences to everyone.

Written for the person who has been told "can you sort out the AI thing?"

Eight parts, done in order. Each one starts with a short summary, then a list of things to tick off. Tick a box when the job is done, not when you plan to do it. "Nearly" is not a tick. Most of it takes a few weeks. Cleaning up after a bad rollout takes a lot longer.

WHAT'S INSIDE

1 Know what it is for	Name the jobs and the person in charge
2 Pick the tool	Business plan, one main AI, a proper trial
3 Clean up your files	Permissions, sharing and old accounts
4 Set the rules	What goes in, what needs a check, who to tell
5 Run a small pilot	A few people, real jobs, keep score
6 Train people	An hour now saves months of bad habits
7 Roll out by team	In stages, with licences you actually use
8 Keep watching	30 days, 90 days, 12 months
Also	Six ways this goes wrong, and a sign-off sheet

1. Know what it is for

If you cannot name the jobs, you are buying an expensive toy.

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Write down three weekly jobs that waste time. Measure them now so you can prove the saving later. Give one person the job of owning the rollout.

- ☐ Name three jobs people do every week that eat time. Emails, proposals, meeting notes, reports and spreadsheets are the usual suspects.
- ☐ Time each job as it is done today. No starting number means no proof of a saving later.
- ☐ Choose one person to own the rollout. If everyone owns it, nobody does.
- ☐ Decide what success looks like in numbers. Hours saved, fewer errors, faster turnaround.
- ☐ Check your reason is not "everyone else is doing it". That is a reason to be nervous, not a plan.

2. Pick the tool

Use the AI that already sits where your work lives.

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Microsoft business? Start with Copilot. Google business? Start with Gemini. Pay for the business plan, never judge AI on the free version, and run a proper trial.

- ☐ Work out whether you run on Microsoft 365 or Google Workspace. That settles most of the decision.
- ☐ Buy business plans only. Personal accounts have no admin controls and put your data in staff members' private logins.
- ☐ Count the real cost: licences, setup, training, support and any extra usage charges. Set a cap on the extra charges.
- ☐ Trial the shortlist for two weeks on three real jobs, using the same files and the same judges for every tool.
- ☐ Trial the paid version. The free version runs a lighter engine and will make good tools look bad.
- ☐ Pick one main AI for the whole business. Allow a second tool for a team only when they can show it earns its keep.
- ☐ Not sure which one? Our guide, *Which AI should your business use?*, covers prices, ratings and the trial in detail.

3. Clean up your files and permissions

The step everybody skips, and the one that bites hardest.

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AI shows people everything they are allowed to see, including things nobody knew they could see. Fix your permissions before you switch it on, not after.

- ☐ Check who has access to the HR, payroll, finance, legal and board folders. Fewer people than you think should be on that list.
- ☐ Remove "Everyone" and "Anyone with the link" sharing from anything sensitive.
- ☐ Remove old staff accounts, old contractors and guest users who have no reason to be there.
- ☐ Check shared mailboxes. Plenty of businesses forgot who is in them.

- ☐ Ask your IT provider for a permissions report on your SharePoint, OneDrive or Google Drive.
- ☐ Do the boss test. Log in as an ordinary staff member and ask the AI what the boss earns. If it answers, stop and fix your permissions.

The AI is not snooping. Your permissions were already a mess. The AI just reads faster than people do.

4. Set the rules

Before the tool is switched on, not after the first incident.

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Staff need to know what they can paste in, what must be checked, and who to tell when something goes wrong. Write it down in one or two pages, not twenty.

- ☐ Adopt an AI use policy. Our plain-English template is a good start.
- ☐ List the approved tools by name. Anything not on the list is not for work.
- ☐ Decide what data is off limits. Passwords, bank details, tax file numbers, health records and anything under an NDA are the obvious ones.
- ☐ Decide what needs a person to check before it leaves the building. Client emails, quotes, contracts and anything published.
- ☐ Name the person staff tell when something goes wrong, and make it clear they will not be in trouble for telling.
- ☐ Check your client contracts for anything about AI or third-party tools.

5. Run a small pilot

Ten keen people for a few weeks will teach you more than a company-wide launch.

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Pick a small group with mixed roles, give them real jobs, keep score and fix what breaks. Include at least one sceptic.

- ☐ Pick a pilot group of about five to ten people with different jobs.
- ☐ Include at least one sceptic. They will find the problems the fans do not see.
- ☐ Set up the licences, the connections to your systems, the limits on what the AI can touch, and the usage caps.
- ☐ Give them real jobs and real examples. Leave out anything sensitive.
- ☐ Keep score. How long it took, how much needed fixing, what it got wrong, whether people trusted it, what it cost.
- ☐ Ask one question every week: "What did it get wrong this week?"
- ☐ Fix what the pilot found before anyone else gets access.

6. Train people

A licence is not training.

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Give people an hour and a handful of good prompts and they will use it well. Give them nothing and they will use it like Google, then tell everyone it is rubbish.

- ☐ Run a short session for each team, built around that team's own jobs.
- ☐ Hand out the staff explainer, *AI at work: what your team needs to know*.
- ☐ Give each team five to ten prompts that suit their work.
- ☐ Show what bad output looks like, including the confident wrong answer.
- ☐ Name a go-to person for questions, so nobody has to guess.
- ☐ Record the session so new starters can watch it.

7. Roll out by team

Boring, slow and it works.

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Add one team at a time, leave a week between each, and take licences off people who are not using them.

- ☐ Roll out in stages. Leave about a week between teams so problems show up while they are small.
- ☐ Check usage at 30 days. Remove licences from anyone who has not touched it. You are paying for them.
- ☐ Add AI access to your new starter checklist.
- ☐ Add AI access to your leaver checklist. Close the account, not just the email.
- ☐ Tell the team what the pilot found, good and bad. People trust honest.

8. Keep watching

These products and their prices change fast.

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Check at 30 days, 90 days and 12 months. At 12 months, run the trial again.

- ☐ 30 days: who is using it, who is not, and why.
- ☐ 90 days: compare against the starting numbers from Part 1. Did it save the time you thought it would?
- ☐ Every month: look at the bill, including extra usage charges.
- ☐ Every time the tool changes in a big way: read the policy again and update it.
- ☐ 12 months: run the trial again. Prices, features and rivals will have moved.

Six ways this goes wrong

All of them have happened to somebody.

What happens	How to avoid it
Everyone buys their own subscription on a credit card and nobody knows who is paying for what.	Business plans only, bought centrally. Check expense claims.
Nobody is trained, so staff use it like Google and decide AI is overhyped.	One hour of training and a set of prompts for each team.
Permissions are never checked and a staff member discovers what the boss earns.	Part 3. Do the boss test before you switch anything on.
A client gets an email that still says "Certainly! Here is a polished version of your email."	A person reads everything before it goes out. Every time.
The "small pilot" is the entire company by Friday.	Name the pilot group. Everyone else waits for their turn.
Nobody owns it, so nothing is checked and nothing is fixed.	One named owner, and the owner is not "IT" in general.

Sign-off sheet

Tick each part off and get a name against it.

Part	Done	Date	Signed off by
1 Know what it is for			
2 Pick the tool			
3 Clean up your files			
4 Set the rules			
5 Run a small pilot			
6 Train people			
7 Roll out by team			
8 Keep watching			
Want a hand? We run the setup, the pilot and the training. Call 02 9037 6500 or email support@commonsense.com.au.			