

FRONT

The Rules — Safe & Sane AI for Small Business

For owners, operators, bookkeepers, nonprofit EDs, and HR-of-one

The 5 Jobs to Give AI First

Pick the one that wastes the most of your week. Start there Monday.

Job	Tool	Expected weekly savings
Draft customer emails	Gemini or ChatGPT	2-4 hours
Summarize meetings	Granola (records, transcribes, summarizes)	2-3 hours
A week of social posts in 5 min	Gemini → Canva	3-5 hours
Spreadsheet cleanup & insights	Gemini in Sheets	1-3 hours
Rehearse a hard conversation	Gemini ("role-play as an unhappy customer")	priceless

My 5-Sentence AI Policy (fill in tonight)

At _____ (business name), we use AI to _____.

We never use AI for _____.

The person responsible for AI use is _____.

We review our AI use every _____ (week / month / quarter).

If something goes wrong, we _____.

What "Agents" Actually Are (the plain-English version)

An **agent** is just a chain of AI steps that happen without you clicking. Example:

Email comes in → AI reads it → AI drafts a reply in your voice → reply waits in your Slack for your one-click approval → sends.

Built with **n8n** or **Gumloop**. No code. You stay in charge with the approval click. That's the **two-eyes rule**, automated.

BACK

The 3 Rules — in your business, in plain English

1. Never paste private data into a free tool.

That means: no customer credit cards, no patient info, no employee SSNs, no client contracts marked confidential, no donor lists. If you wouldn't email it to a stranger, don't paste it into ChatGPT.

2. Two-eyes rule.

Every output that goes to a customer, a regulator, the IRS, the bank, or the press → a human reads it first. Even when the AI is right 99 times, the 100th is the one that costs you.

3. Keep the receipts.

Make a Google Drive folder called "**AI receipts**." Paste the prompt and the answer for anything important. You'll thank yourself the first time something goes sideways.

When You're Ready to Grow Up

- **Glean** — like ChatGPT, but it knows everything in YOUR company (Drive, Slack, email, CRM) and respects who's allowed to see what. For ~\$20-30/user/mo. → glean.com
- **AIGovOps Foundation Beacon** (free, open-source) — finds every AI tool in your business and checks it against 23 audit frameworks. For when your bank or insurer asks "what's your AI policy?" → aigovops-foundation.com

Free Tools That Are Actually Worth It

Tool	Free tier good enough for	Where
Google Gemini	90% of small-business needs	gemini.google.com
Perplexity	Research with sources	perplexity.ai

Canva	Social posts, flyers, marketing	canva.com
Granola	First 14 days then \$18/mo (worth it)	granola.ai
Gamma	Decks, websites, social	gamma.app

My Win Today

The 5 hours/week I'm getting back is by automating: _____
