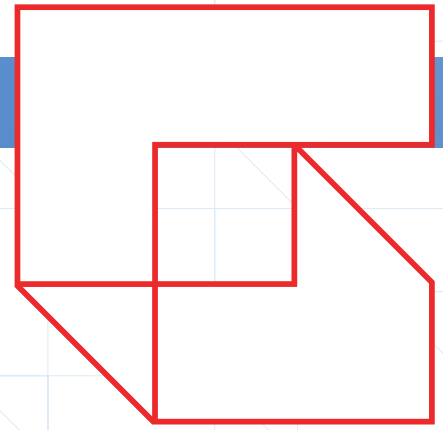


QUICK START GUIDE

# AI Best Practices for MSPs:

## Developing Usage Policies and Guidelines



Global Technology Industry Association



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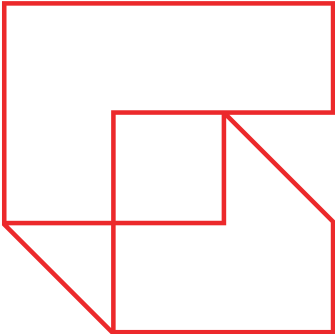
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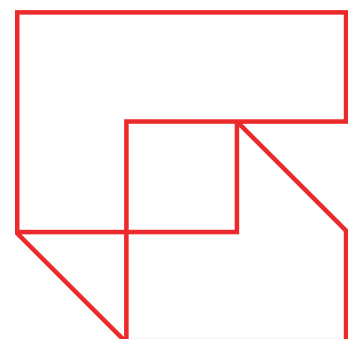
# A Step-by-Step Guide to Creating Personalized AI Usage Guidelines

Artificial intelligence (AI) is a powerful tool capable of maybe an infinite amount of amazing things. But just like any tool, it can be used the wrong way and lead to frustration, failure or even damage.

Harnessing the power of AI can help a business meet specific needs and goals, but it takes organization, discipline and strategy to use it correctly.

The following Quick Start Guide was developed by West McDonald, GTIA AI Advisory Council member and founder and partner of GoWest.ai, to help MSPs create appropriate usage policies and procedures that can help both employees and clients be more successful. Security, ethics and user education are just a few topics to consider when implementing AI.

Finally, as AI solutions continue to develop and mature, it's important to remember that any policies and procedures could be regularly monitored and updated to ensure they align with company culture, current trends and possibly laws or regulations.



## Step 1: Initial Consultation

**Objective:** Understand the company's specific needs and goals for AI usage.

- **Meeting:** Arrange a kickoff meeting with key stakeholders to discuss objectives, current AI usage and areas of concern.
- **Assessment:** Conduct an assessment of the company's existing policies and AI tools in use.

## Step 2: Identify Key Areas for Guidelines

**Objective:** Determine the core areas that the guidelines need to address.

- Approval Process for AI Use
- Data Security
- System Security
- Intellectual Property
- Privacy Norms
- Risk Management
- Compliance (HIPAA, GDPR, etc.)
- Ethical Use of AI

### Example:

#### Maintaining Confidentiality and Ensuring Data Security

- It is important for us all to do our best to circumvent the release of any corporate data, analytical information, or proprietary assets in an open AI environment. The exposure of such materials on external servers could risk its security and privacy.
- Only [AI tool 1] and [AI tool 2] chat engines are permitted for use, and a license must be applied for with approval by [employee name]. "Free" chat engines must manually have chat history turned off, and the risk of using company data for AI training is not permissible. The approved chat engines ensure a private workspace and that data will not be inadvertently used in model training.
- We must respect the privacy rights of individuals. If you are unclear about how to ensure this, please contact [employee name] to discuss.

## Step 3: Drafting the Guidelines

**Objective:** Create a draft of the guidelines focusing on the identified key areas. Use the sample section below as a guideline. Customize or tailor each section to reflect your company's specific context and needs.

- **Example Section:**
  - **Maintaining Confidentiality and Ensuring Data Security:**
    - **Sample:** "Circumvent the release of any company data analytical information or proprietary assets in an open AI environment."
    - **Customized:** "Ensure that any company data or proprietary information is not disclosed in AI environments to maintain data security."

## Step 4: Review and Feedback

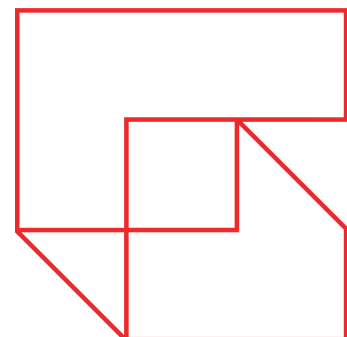
**Objective:** Gather feedback from various departments to refine the guidelines.

- **Internal Review:** Share the draft with key departments (IT, legal, HR) for review.
- **Feedback Session:** Hold sessions to discuss feedback and incorporate necessary changes.
- **Example Feedback Question:** "Do you foresee any challenges in implementing these guidelines within your department?"

## Step 5: Finalization and Approval

**Objective:** Finalize the guidelines and obtain formal approval.

- **Revisions:** Make any final adjustments based on feedback.
- **Approval:** Obtain sign-off from senior management.
- **Documentation:** Ensure the guidelines are documented and accessible.



## Step 6: Implementation Plan

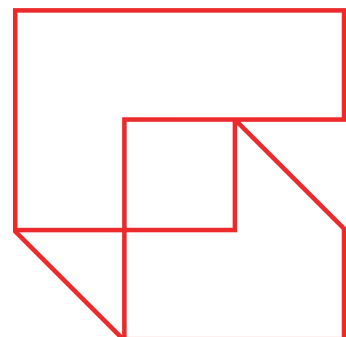
**Objective:** Develop a plan for rolling out the guidelines across the company.

- **Training:** Organize training sessions for employees.
- **Communication:** Use internal communication channels to announce the new guidelines.
- **Example Announcement:** “We are pleased to introduce our new AI usage guidelines to ensure responsible and secure AI practices.”

## Step 7: Monitoring and Updates

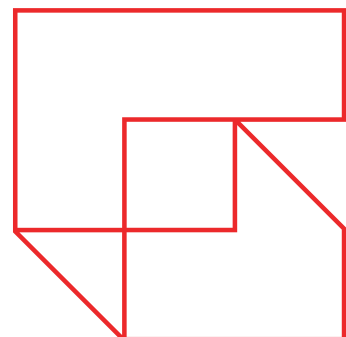
**Objective:** Establish a process for ongoing monitoring and updates to the guidelines.

- **Monitoring:** Set up a team or individual responsible for monitoring compliance and effectiveness.
- **Updates:** Schedule regular reviews to update the guidelines as needed.
- **Example Monitoring Plan:** “The IT department will conduct quarterly reviews to ensure adherence to the AI usage guidelines.”



## Personalization Tips

1. **Align with Company Culture:** Ensure the guidelines reflect the company's values and culture.
2. **Engage Employees:** Involve employees in the development process to foster a sense of ownership.
3. **Be Specific:** Provide clear and specific instructions relevant to the company's operations.
4. **Keep it Simple:** Ensure the guidelines are easy to understand and follow.



## Acknowledgements

Special thanks to West McDonald, GTIA AI Advisory Council member and founder and partner of GoWest.ai, an AI-focused services firm, for creating this Quick Start Guide to share with GTIA members.

