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AI / BUSINESS GROWTH / CHECKLIST

# Communicating AI Adoption in Your Small Business — A CLEAR Checklist

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A practical, plain-English checklist for UK small-business owners and managers to explain a limited AI trial, define human review and data boundaries, address staff concerns, and collect feedback before expanding use.



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## A practical change-management checklist for UK small-business owners and managers

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Introducing an AI tool is a work change, not simply a software purchase. Use this checklist before you ask a team to use an AI-assisted tool, and revisit it after the first few weeks. It helps you explain the purpose, set usable boundaries, answer fair concerns and collect feedback without promising outcomes you cannot yet prove.

**The CLEAR method:** **Clarify** the purpose; **Link** the tool to familiar work; **Explain** what changes; **Address** concerns; and **Reinforce** the human–AI partnership.

This is general business education, not legal, employment, data-protection or cyber-security advice. It does not make an AI use case compliant or secure. Check the current guidance and obtain suitable advice for your circumstances.

## Before you communicate: prepare the facts

Do not announce a tool because it sounds impressive. First agree the small, specific task you are considering and name the person accountable for the rollout.

| Decide before the announcement | Write the plain-English answer                                                                                         |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <b>Tool and task</b>           | What will the tool help with? Keep the first task narrow, such as preparing an internal summary of a customer enquiry. |
| <b>Business reason</b>         | What current frustration, delay or repetitive task are you trying to improve?                                          |
| <b>Scope</b>                   | Which team, documents, inbox or process is included?<br>What is explicitly outside scope?                              |
| <b>Human role</b>              | Who checks the output? Who makes the final decision or sends anything externally?                                      |

| Decide before the announcement | Write the plain-English answer                                                                                          |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <b>Data boundary</b>           | What information may be used? What must never be entered into the tool?                                                 |
| <b>Owner and support</b>       | Who answers questions, keeps instructions current and decides whether to pause the trial?                               |
| <b>Fallback</b>                | What is the manual process if the tool is unavailable, uncertain or wrong?                                              |
| <b>Evidence needed</b>         | What would make the trial useful or not useful? For example: review time, corrected outputs, errors and staff feedback. |

Use terms your colleagues recognise. “AI-assisted draft”, “suggested category” and “review queue” are usually clearer than “intelligent automation”. Do not say that a tool is “trained on our business” unless that is technically accurate and you can explain what it means.

# 1. Clarify the purpose

## Make the reason specific

- ☐ Name **one task** the tool will support, rather than saying it will “transform the business”.
- ☐ State the current problem in observable terms: duplicated typing, a slow handover, repeated sorting or difficulty finding an approved document.
- ☐ Describe the hoped-for benefit as a **working hypothesis**, not a promise. For example: “We will test whether this reduces the time spent preparing first drafts while keeping a human check.”
- ☐ Say what will not change. For an early trial, that might be: “Customer commitments, prices and final replies will still be approved by a person.”
- ☐ Keep a list of what is known, assumed and still to be tested. Do not turn an assumption into a target that staff feel pressured to meet.

## Tailor the message to the people affected

Different people need different answers. A business owner may want to understand cost, risk and accountability. A front-desk colleague may need to know whether an AI suggestion changes their daily queue. A supervisor may need to know how to spot an uncertain output and who to tell.

- ☐ List the people who will use, supervise or be affected by the tool.
- ☐ For each group, state the practical benefit, the new responsibility and the help available.

- ☐ Ask one representative user to read the message before it is sent. If they cannot explain the change back to you, simplify it.

## Use a concrete, honest example

**Fictional example — electrical contractor.** A small contractor tests a tool that turns an engineer’s approved site notes into an **internal** job-summary draft. The office coordinator checks the draft against the original notes before using it. The tool does not price work, make safety decisions, promise appointments or send messages to customers. The business measures how often drafts need meaningful correction and whether the review step is manageable.

This example is illustrative. It is not a client result, a performance claim or a recommendation that the same use is suitable for every trades business.

## 2. Link the tool to familiar work

People do not need a lecture on machine learning to understand a careful first use. They do need a truthful explanation of where the tool fits in their work.

### Explain it in everyday language

- ☐ Compare the tool to a familiar process only where the comparison is fair. An AI drafting aid can be described as a fast first-draft helper; it is not an expert who knows the business context without being given it.
- ☐ Explain that the output is a suggestion to review, not an instruction to follow.
- ☐ Use one short example from the team’s real workflow, with permitted or dummy information.
- ☐ Avoid claiming that the tool “understands”, “knows” or “will learn” something unless you can explain the actual setup and its limits.

Generative AI can produce convincing but incorrect statements. The National Cyber Security Centre (NCSC) also highlights risks such as prompt injection, where content is designed to make a system behave in an unintended way. Treat external text, emails and uploaded documents as inputs to assess, not instructions that can override your agreed process. [2](#)

### Use relevant evidence, not borrowed success stories

- ☐ If you describe a similar implementation, be clear whether it is your own tested example, a supplier case study or a fictional illustration.
- ☐ Do not present another firm’s result as a likely result for your business.
- ☐ Prefer a small demonstration using your agreed task over a generic claim that “other businesses are saving hours”.

- ☐ Record what the team notices during the trial. Their experience is more useful than an unverified industry anecdote.

### 3. Explain exactly what changes

A vague announcement creates rumours. Show the before-and-after process in enough detail that a colleague can tell where their judgement remains essential.

#### Complete this task split

| Step in the work                         | Before the trial                               | During the trial                                           | Human owner and decision |
|------------------------------------------|------------------------------------------------|------------------------------------------------------------|--------------------------|
| Receive the input                        | Who receives it and where?                     | What approved information may enter the tool?              | _____                    |
| Prepare the draft or suggestion          | How is this done now?                          | What does the AI produce?                                  | _____                    |
| Check accuracy and suitability           | Who checks it now?                             | What must the reviewer check?                              | _____                    |
| Take an external or consequential action | Who sends, approves, books, prices or decides? | Does the AI have any authority here? If not, say so.       | _____                    |
| Handle uncertainty or failure            | What happens now?                              | How is the issue reported and what is the manual fallback? | _____                    |

- ☐ Mark every action as **AI suggests**, **person checks**, or **person decides**.
- ☐ Name the information source for the tool. Do not assume it has access to correct or current business information.
- ☐ State any hard boundary: for example, no automatic sending, no payment change, no pricing decision and no use with sensitive customer information unless separately authorised.
- ☐ Give users a simple flow to follow: **approved input** → **AI draft/suggestion** → **human check** → **approved action or manual fallback** → **issue logged**.

## Describe how the working day will feel different

- ☐ Tell staff whether they will start work in a different inbox, add a review step, use a new template or record an exception.
- ☐ Explain what stays the same: professional judgement, customer care, safety checks, contract approval and escalation remain human responsibilities unless a properly authorised process says otherwise.
- ☐ Provide a short written instruction with screenshots or a live demonstration. Ask the person to complete one supervised example before they use real work.
- ☐ Make time for the review step. A faster draft does not prove the whole process is faster if checking, correction or rework rises.

## Set fair performance expectations

Do not introduce a target such as “process twice as many enquiries” simply because a tool is available. During the trial, review quality, corrections, exceptions, turnaround time and staff workload together. If a role, performance measure or employment expectation may change, explain the proposed change honestly and use appropriate employment advice or consultation for your situation.

# 4. Address concerns before they become silence

Invite questions before and after the announcement. The aim is not to persuade everyone that every concern is mistaken; it is to make the boundary, support and decision process visible.

## Say the difficult things plainly

- ☐ Acknowledge likely worries: job security, skills, monitoring, loss of judgement, incorrect answers, customer impact and confidential information.
- ☐ Say what has and has not been decided. Do not promise that no role will ever change if you cannot honestly make that promise.
- ☐ Explain the tool's limitations in plain language. It may be wrong, incomplete, biased or unsuitable for an unusual case.
- ☐ State the escalation route for urgent or unclear work. A colleague should not have to choose between following a poor suggestion and hiding the problem.

**Useful wording:** “This tool may help us prepare or sort work. It does not replace your responsibility to check facts, use your judgement or raise an issue. If an output is unclear or wrong, stop using it for that item and follow the existing route.”

## Put privacy and security boundaries in the message

The ICO's AI guidance covers accountability, transparency, lawfulness, accuracy, fairness, security and data minimisation. It is currently under review following changes made by the Data (Use and Access) Act, so check its current status before relying on it. [1](#)

- ☐ Tell staff which tools and accounts are approved. Do not expect them to choose a personal or free AI tool for work.
- ☐ State what data may be entered and what may not. Use only the minimum information needed for the agreed task.
- ☐ Do not put passwords, access codes, payment details, special-category personal data, confidential client material or live customer information into an unapproved tool.
- ☐ Ask the person responsible for privacy/data protection whether the planned processing needs a more formal assessment. The ICO's DPIA guidance is a useful starting point where processing is likely to create higher risk for people. [3](#)
- ☐ Keep access limited to people who need it. Remove access when someone changes role or leaves, following your normal account process.
- ☐ Check the supplier terms, settings, retention, access controls and support route before use. If you cannot answer a basic question about where information goes, pause and investigate.

These checks reduce risk; they do not provide a compliance guarantee. The NCSC advises leaders to treat security as a requirement throughout an AI system's lifecycle, not as an afterthought. [2](#)

## Give staff a simple error-handling route

| If this happens                                           | The user should do this                                                                       | Owner / next step |
|-----------------------------------------------------------|-----------------------------------------------------------------------------------------------|-------------------|
| The output is wrong, misleading or unsuitable             | Do not use or send it. Save the original input and report the issue through the agreed route. | _____             |
| The tool seems unsure or lacks needed information         | Use the manual process or ask the named reviewer. Do not guess.                               | _____             |
| An unfamiliar instruction appears in an email or document | Treat it as untrusted content. Do not allow it to alter the task or reveal information.       | _____             |
| The tool is unavailable                                   | Use the documented manual fallback. Record the interruption if it affects service.            | _____             |

| If this happens                                               | The user should do this                                                                                                                  | Owner / next step |
|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| Personal or confidential information may have been mishandled | Stop further sharing and alert the named privacy/security contact promptly. Follow your incident process and obtain advice where needed. | _____             |

- ☐ Give the process owner authority to pause the trial.
- ☐ Review errors for patterns, but do not blame the person who reports one.
- ☐ Correct the output and consider whether anyone who relied on it needs to be told.
- ☐ Update the instruction, boundary or training if the same issue could happen again.

### Make support visible

- ☐ Name a first point of contact and a backup.
- ☐ Offer a short demonstration, a one-page instruction and a place to ask questions without embarrassment.
- ☐ Pair early users with a colleague who can help them practise.
- ☐ Schedule a check-in after the first few days and after the first few weeks.
- ☐ Keep the latest instruction in one known location, with a date and version.

## 5. Reinforce the human–AI partnership

The message should not imply that people are there only to feed a tool. Useful AI adoption depends on human context, customer understanding, judgement and the willingness to challenge an answer.

### Be precise about augmentation

- ☐ Say which repetitive preparation or sorting task the tool may assist with.
- ☐ Say which decisions remain human: safety, legal or contractual judgement, customer commitments, sensitive conversations, pricing and exceptions should not be quietly delegated.
- ☐ Recognise the skills that matter more during a trial: checking facts, spotting context, explaining decisions, handling exceptions, relationship-building and raising a concern early.
- ☐ Thank people for catching errors and improving the process. Feedback is part of the work, not resistance.

## Share learning responsibly

- ☐ Share a brief update only when you can describe what actually happened: the task tested, the observation period, what worked, what needed correction and what remains uncertain.
- ☐ Keep client, customer and staff information out of examples unless you have the appropriate permission and a clear reason to use it.
- ☐ Do not invent a success story or use a single good output as proof of reliable performance.

**Fictional example — independent retailer.** A retailer tries an AI-assisted draft for internal responses to common delivery questions. Staff find the first drafts useful for ordinary queries but keep refunds, complaints and unusual orders in a human queue. After two weeks, the manager reviews correction notes with the team before deciding whether to continue the limited trial. This is an illustrative learning pattern, not a promised result.

## Create a feedback loop

Use a light weekly check-in while the trial is active:

- ☐ What task did the tool help with this week?
- ☐ What did users have to correct or do manually?
- ☐ Did an unclear, unsafe or privacy-related situation occur?
- ☐ Is the review step realistic during a busy period?
- ☐ What should we keep, change, pause or stop?
- ☐ Who owns the next action, and by when?

Do not expand the tool's permissions, data access or authority because it performed well on a few easy examples. Record the proposed change, assess the new risk and test it before changing the everyday process.

## A seven-step first announcement

Use this sequence for a small, supervised trial.

1. **Choose the audience.** Tell the people who use or supervise the process before making a broad announcement.
2. **State the reason.** Name the one current task and the problem you are testing.
3. **Show the task split.** Be clear about what the AI suggests and what a person checks or decides.
4. **Set the boundary.** Say what data, actions and decisions are outside the trial.
5. **Give the support route.** Name the owner, training time, written instruction and manual fallback.

6. **Invite questions.** Ask for concerns, including concerns about roles, accuracy, workload, security and customer impact.
7. **Set the review point.** Give a real date or event for reviewing evidence and deciding whether to continue, change or stop.

## Adaptable internal message

### Subject: A small AI-assisted trial for [task]

We are testing an AI-assisted tool to help with **[specific internal task]**. The reason is **[current problem we are trying to understand or reduce]**. This is a limited trial, not a claim that the tool will solve every part of the process.

The tool may **[prepare/sort/summarise]**. A person will still **[check facts/approve the action/make the decision]**. It will not **[send externally/change prices/make commitments/use excluded data]**.

Please use only **[approved account/tool]** and follow the attached instruction. If the output is wrong, unclear or unsuitable, do not use it for that item; use **[manual fallback]** and tell **[named owner]**. For questions about data or access, contact **[named contact]**.

We will review the trial on **[date]**. Please share what helps, what creates extra work and any concern you notice. Your experience will shape the decision.

## Completion record

Before the first team announcement, confirm each line below.

| Check                                                                   | Completed by | Date / note |
|-------------------------------------------------------------------------|--------------|-------------|
| The task, intended benefit and limitation are written in plain English. |              |             |
| Affected users understand the task split and the manual fallback.       |              |             |
| The approved tool, data boundary and access owner are named.            |              |             |
| A reviewer and escalation route are in place.                           |              |             |
| Training/support and a feedback route have been arranged.               |              |             |

| Check                                                                          | Completed by | Date / note |
|--------------------------------------------------------------------------------|--------------|-------------|
| The trial review date and decision owner are agreed.                           |              |             |
| Privacy, security, employment or specialist advice needs have been considered. |              |             |

## References and verification notes

1. [ICO — Guidance on AI and data protection](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/>

2. [NCSC — AI and cyber security: what you need to know](https://www.ncsc.gov.uk/guidance/ai-and-cyber-security-what-you-need-to-know)

<https://www.ncsc.gov.uk/guidance/ai-and-cyber-security-what-you-need-to-know>

3. [ICO — Data Protection Impact Assessments \(DPIAs\)](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/>

The official sources below support the limited privacy and security guidance in this checklist. They do not guarantee legal compliance, security or a business outcome. Guidance and supplier features can change; check current information before implementation.

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