



05

FREE GUIDE

Bring AI into your team in 30 days

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INSIDE

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The plan

1. Week 1: choose one AI tool on a business account, write one page of house rules, and name a champion in each team.
2. Weeks 2 and 3: the champions try it on real work first. Then everyone gets a short session and a shared list of prompts.
3. Week 4: measure the time saved honestly, keep what worked, and drop what didn't.

Try this now: your one-page AI house rules

This is the page you'd write in week 1 of the plan, already written. Copy it, fill in the brackets, and delete anything that doesn't fit your business.

COPY THIS

[BUSINESS NAME]: How we use AI at work Version 1 · [DATE] · Questions go to [NAME] or your team's champion

Which tool. We use [TOOL] on our business account, signed in with your work email. Don't use personal AI accounts, free chatbots or browser add-ons for work, including on your own phone.

What it's good for. First drafts of emails, documents and procedures. Summarising long text. Tidying notes. Explaining things. Spreadsheet help.

What never goes in. - Passwords, access codes, bank or card details - Social Insurance Numbers, health card numbers, driver's licence numbers - Health information about any person - Client files, legal matters, or anything under a confidentiality agreement, unless [NAME] has approved that use in writing - Staff records: pay, performance, discipline, medical notes - Anything a client asked us to keep private

When in doubt, take the name out. If you can do the task without a person's name, address or details, remove them first. "A client in her 60s" works as well as her name.

You check everything. AI can state false things in a certain voice. You're responsible for anything you send, sign or publish, the same as if you wrote it. Check every fact, number, name, date and quote.

A person reads it first. Nothing written by AI goes to a customer unread. Don't use AI to make decisions about customers or staff (hiring, approvals, discipline, one person's price).

Be honest. If a client asks whether AI was used, tell them the truth.

Made a mistake? If you put in something that shouldn't be there, tell [NAME] the same day. You won't be in trouble for reporting it. We need to know so we can deal with it properly.

Leaving. Your AI account closes on your last day, with your other accounts.

I've read these rules. Name: __ Date: __

Start here if you've never used AI

You don't need to have used AI to run this plan. You need to understand five things, and they take three minutes.

What an AI chatbot is. It's a website or app where you type a request in plain words, and it types an answer back in full sentences. ChatGPT, Claude, Gemini and Microsoft Copilot are the best known. Your staff can ask it to draft an email, summarise a long document, or explain a spreadsheet formula.

What it's good at. First drafts. Rewording. Summarising. Turning rough notes into something tidy. Answering "how do I do this in Excel?"

What it's bad at. Knowing facts about your business that nobody gave it. Knowing when it doesn't know. It can write something false in a calm, certain voice. People call this being "confidently wrong". So the rule for everyone is simple: a person checks everything before it's used.

What an automation is. A rule that does a step for you when something happens, like a mail merge that runs by itself. This guide isn't about automations. It's about people using AI in their own daily work. Automations come later, once your team knows the tool.

Where your words go. When you type into an AI tool, your words travel to the company that runs it. What that company may do with them depends on the kind of account you use. That's why this plan starts with choosing the right account.

Try this now (5 minutes). Go to chatgpt.com or claude.ai and make a free personal account. Type this, with nothing private in it:

COPY THIS

I manage a [TYPE OF BUSINESS] with [NUMBER] staff. Write a friendly two-paragraph email to the team saying we're closing early on [DAY] for a staff lunch.

Then ask: "Make it shorter and less formal." Then ask: "What's the phone number of our office?" Watch what it does with a question it can't know the answer to. Some tools will say they don't know. Some will make one up. You now know what to watch for.

Words you'll see

Word	What it means
Prompt	The instructions a person types for the AI.
Personal account	An account one person signs up for. It belongs to them, not the business.
Business plan	A version of the AI tool sold to organisations. The business owns the accounts and controls the settings.
Workspace	Your business's private area inside the tool, holding all your staff accounts.
Admin	The person who manages the workspace: adds and removes people, and sets the rules the tool follows.

Word	What it means
Seat	One person's account on a business plan.
Training on your data	When the AI company uses what people typed to improve its future AI.
Data controls	The settings that decide what happens to what people type.
House rules	Your one-page policy on how staff use AI. A policy is simply a written rule everyone follows.
Champion	One person per team who tries AI first and then helps their colleagues.
Prompt library	A shared document of prompts that worked, for everyone to reuse.
Personal information	Anything about an identifiable person: name, contact details, health, finances, and so on.
PIPEDA	Canada's federal privacy law for private businesses.
Law 25	Quebec's privacy law.

1. What 30 days gets you

At the end of the month, every person on your team has a work account on one AI tool that the business pays for and controls. They know what they can type into it and what they can't, because it's written on one page. Each team has someone to ask. There's a shared list of prompts for the jobs your business actually does.

And you have a number you can trust: minutes saved per task, measured on real work, with checking time included.

This plan is for businesses with 5 to 200 people. Below five, skip the champions and do all four weeks yourself in a fortnight. Above 200, your IT people will want a longer trial, but the structure holds.

Why do it on purpose instead of letting people find their own way? Because some of them may already have. There's a fair chance someone on your team is pasting client emails into a free chatbot on their personal account right now. They're trying to help. The problem is that nobody knows what went where.

2. Why a plan beats "just start using it"

Without a plan, a few keen people use AI heavily on their own accounts. Most try it once, get a bland answer and give up. Nobody can say whether it helps.

A plan changes each part. One approved tool keeps company information in an account you control. Champions give hesitant people someone to ask who does the same job. A month of measuring gives you a decision based on your own numbers.

It also protects you. Canadian privacy law makes the business accountable for personal information it handles, including when staff type it into a tool. Written rules and a business account are the sensible minimum. Section 7 covers the basics.

Before and after, one team. (A made-up office.)

Before: three staff use three different free chatbots. One pastes a client's tax letter into hers to get a summary. Nobody else knows. When she leaves, her chat history leaves with her.

After: everyone signs in to one business workspace with their work email. The house rules say client letters have names removed first. When someone leaves, the admin removes their seat that afternoon, along with their email.

3. Choosing the right kind of account

This is the one decision that's hard to undo, so it comes first.

Personal account or business plan?

A personal account is one a person signs up for with their own email, free or paid. It belongs to them. The business can't see who has one, can't set its rules, and can't close it when they leave. Depending on the tool and the settings, what they type may be used to train the company's future AI. ChatGPT and Claude both let personal users switch that off, but it's the individual's switch, not yours.

A business plan is the same tool, sold to an organisation. The business creates a workspace, invites staff with their work emails, and one or two admins control it. You decide who's in, what's switched on, and what happens when someone leaves.

What "training on your data" means

AI companies improve their AI partly by learning from conversations. If a tool trains on your data, something a staff member typed could be used in that learning. It doesn't mean your email appears word

for word in someone else's chat. It does mean your information has left your control and is being used for a purpose you didn't choose. For a business holding client information, that's reason enough to want it off.

What an admin is and does

An admin is the person who manages your workspace. Usually that's the owner, the office manager, or whoever looks after your computers. From the admin settings they can:

- Invite people and remove them
- Confirm training on your data is off
- Decide which extras are switched on, like letting the AI read email or files
- See how many seats are in use

Pick two admins, so you're never locked out when one is away.

The main business plans

As of the date at the top of this guide:

- **ChatGPT Business** (called ChatGPT Team until 2025) and ChatGPT Enterprise: OpenAI says business data isn't used to train its models by default.
- **Claude Team** and Claude Enterprise: covered by Anthropic's commercial terms, under which your content isn't used for training.
- **Gemini in Google Workspace:** Google says Workspace content used with Gemini isn't used to train its models, and it follows your existing Workspace admin settings.
- **Microsoft 365 Copilot and Copilot Chat**, when staff sign in with a work account: Microsoft says prompts and responses are covered by its enterprise data protection, aren't used to train its models, and respect your existing file permissions.

Terms change. Before you sign up, read the provider's current business privacy page and confirm the training setting yourself.

How to choose

If your business already runs on Microsoft 365 (Outlook, Word, Teams), start with Copilot. Staff already sign in, and it works inside the programs they use. If you run on Google Workspace (Gmail, Google Docs), start with Gemini for the same reason. If you'd rather have a writing and reasoning tool that sits apart from your email, trial ChatGPT Business or Claude Team with your champions in week 2 and choose after.

Whichever way you go, approve only one. Two tools means two sets of settings, two sets of habits and half the shared prompts.

How signing up usually works

The screens differ between tools, but the steps are much the same:

1. Go to the tool's business page and click the button to start a business or team plan.
2. Sign in with your work email. You become the first admin.
3. Name the workspace (your business name).
4. Choose how many seats. Start with your champions only.
5. Open the admin settings (look for **Settings**, **Admin** or **Workspace settings**) and work through the checklist below.
6. Invite people by typing their work email addresses. They get an email with a link to join.

For Copilot and Gemini, there's often nothing new to sign up for. Your Microsoft 365 or Google Workspace admin switches it on for chosen people from the existing admin centre.

Printable checklist: admin settings on day 5

- ☐ Only people with our company email domain can join
- ☐ Training on our data is off (or confirmed off by default)
- ☐ I know how long chats are kept, and changed it if I can
- ☐ Public sharing of chats by link is off, if the tool allows that
- ☐ Connections to email, calendars and file storage are off for now
- ☐ If Canadian or regional data storage is offered and our clients care, it's chosen
- ☐ A second admin is set up
- ☐ "Remove AI seat" is on our checklist for staff who leave

4. The 30 days, week by week

Week 1: Decide and prepare

Day 1 to 2: Find out what's already happening. Send everyone a short, no-blame message: "Are you using any AI tools for work? Which ones, and for what?" Say plainly that nobody's in trouble. You'll learn which tools people like and what they use them for. Prompt A in section 6 writes this for you.

Day 2 to 3: Choose the business plan. Use section 3.

Day 3: Write the house rules. Use the template in section 5. Keep it to one page and change the examples to fit your work.

Day 4: Pick your champions. One per team: front desk, operations, finance, sales, or one per location. A champion isn't the most technical person. It's someone their team respects, who's curious and patient. Ask them rather than assign them, and give them an hour a week during the month.

Day 5: Set up. Create the workspace, invite the champions only, and work through the admin checklist.

Week 2: Champions only

Each champion picks **two real tasks** their team does every week that take a while. Good first tasks:

- Drafting replies to common customer emails
- Turning rough notes into a clean summary
- Summarising a long document or policy for a quick read
- Writing a first draft of a job posting, procedure or training sheet
- Getting help with a spreadsheet formula

For each task, they:

1. Do it the old way once and write down the minutes.
2. Do it with AI and write down the minutes, **including the time spent checking and fixing.**
3. Save the prompt that worked in the shared prompt library, with one line on what it's for.

At the end of the week, meet for 30 minutes. Champions share what worked, what didn't, and any house rule that was unclear. Fix the rules now, before everyone else sees them.

Week 3: Everyone

Invite everyone to the workspace. Each person gets the house rules with their invite and replies to confirm they've read them. That reply is the simplest record you'll have.

Each champion runs a **45-minute session** for their own team. People learn more from a colleague doing their own job than from an outside demo. Running order:

1. What it's good at and what it gets wrong (5 minutes)
2. The house rules, especially what never goes in (10 minutes)
3. The champion does one of their two tasks live on screen (10 minutes)
4. Everyone tries the same task on their own computer (15 minutes)

5. Where the prompt library is and how to add to it (5 minutes)

Then set a small challenge: each person uses it on one real task this week and logs the minutes.

Week 4: Measure and decide

1. Collect the logs and add them up (section 8 shows how).
2. Ask each team three questions: What will you keep using it for? What did you stop using it for, and why? What worried you?
3. Decide: keep, expand, or stop. Base it on the numbers and the answers, not on enthusiasm.
4. Write down which tasks become the normal way of working, for example "meeting notes are summarised with AI and checked by the note taker".
5. Update the house rules and set a date to review them in six months.

5. The house rules

The one-page template

The template is at the top of this guide, under "Try this now". The next part explains its most important rule.

What never goes in, and why

Champions will get asked about this list. Here's the reasoning in plain words.

ID numbers and health information are among the most sensitive personal information there is, and a leak harms real people. Health details can often be taken out without losing anything: "patient has lower back pain after a fall" does the job without a name.

Client confidential matters. Law, accounting, HR and some consulting work come with professional or contractual duties to keep things private. If you're in a regulated profession, follow your regulator's guidance and make one firm-wide decision before anyone uses AI on client files.

Staff records. Colleagues didn't agree to have their pay or performance notes run through a new tool.

Decisions about people. AI is useful for drafting and summarising. It isn't a fair or accountable way to decide who gets hired, approved or refused. In Quebec, decisions made only by automated means come with specific duties (section 7).

Try this now: the take-the-name-out drill

Use this in the week 3 session. Show this text on screen:

COPY THIS

Can you summarise this? Margaret Chen, 14 Oak St, Kelowna, called about her invoice #4471. She says she was charged twice for the March visit and wants a refund to her Visa ending 2210.

Ask the team what should come out before it goes anywhere near an AI tool. Answer: the name, address, invoice number and card digits. What's left still does the job:

COPY THIS

Summarise this: a client says she was charged twice for one visit in March and wants a refund.

(Margaret and the details are made up.)

6. Copy-paste prompts

A prompt is the instructions you type for the AI. Copy these, then change the parts in [BRACKETS].

Prompt A: The no-blame question

COPY THIS

Write a short, friendly message from me, the owner of a [TYPE OF BUSINESS] with [NUMBER] staff, asking everyone which AI tools they're already using for work and what for. Make it clear nobody is in trouble, that I want to set us up with a proper tool, and that the answers help me choose. Under 100 words. Plain language.

Prompt B: Find the first tasks for a team

COPY THIS

I manage the [TEAM NAME] team at a [TYPE OF BUSINESS]. Here's what we do in a normal week: [LIST]. Suggest five tasks where an AI writing assistant could save time, starting with the lowest risk. For each, say what could go wrong and what the person must check before using the result. Don't suggest anything that involves health information, ID numbers or decisions about customers.

Prompt C: Turn a win into a library entry

COPY THIS

Here's a prompt I used at work and the result I got: [PASTE BOTH]. Rewrite the prompt so a colleague can reuse it for the same task, with [BRACKETS] where they fill in their own details. Add one line on what it's for and one tip on checking the result.

Prompt D: Get better answers (teach this in week 3)

COPY THIS

Act as [ROLE, FOR EXAMPLE "AN EXPERIENCED OFFICE MANAGER"]. I need [WHAT YOU WANT] for [WHO WILL READ IT]. Here's the background: [FACTS]. Keep it [LENGTH AND TONE]. If anything is missing, ask me before you write.

The last line matters. It invites the AI to ask rather than guess.

Prompt E: Summarise the month

COPY THIS

Here are the time logs and comments from our 30-day AI trial: [PASTE]. Total the time saved per task after checking time. List the tasks where it saved time, the ones where it didn't, and the concerns people raised. Don't estimate anything that isn't in the data. Show the arithmetic so I can check it.

Fill-in-the-blank: a prompt library entry

Each entry in your shared library looks like this:

COPY THIS

Task: [WHAT IT'S FOR] **Who uses it:** [TEAM] **The prompt:** [PASTE, WITH BRACKETS FOR THE PARTS THAT CHANGE] **Check before using:** [WHAT TO VERIFY] **Added by:** [NAME], [DATE]

7. Canadian privacy basics

This is a plain summary to help you ask the right questions. It isn't legal advice. If you handle sensitive information, or aren't sure which rules apply to you, talk to a privacy lawyer or your professional body.

PIPEDA, the federal law. The Personal Information Protection and Electronic Documents Act is Canada's federal privacy law for private businesses. It covers how you collect, use and share personal

information in the course of business. It's built on ten principles, including accountability, consent, limiting use, and safeguards. For AI at work, that means:

- Your business stays accountable for personal information it hands to a service provider, including an AI company. Choose a provider with suitable protections, and use a business account you control.
- Use personal information only for the purposes people were told about when you collected it.
- Protect it in proportion to how sensitive it is. Written rules, a business account and controlled access are part of that.
- If a breach creates a real risk of significant harm, you must report it to the Office of the Privacy Commissioner of Canada and tell the people affected. You must also keep a record of every breach.

BC, Alberta and Quebec have their own private-sector privacy laws that apply instead of PIPEDA for much of what happens inside those provinces. The ideas are similar. If you operate there, check which law covers you.

Quebec's Law 25, if you collect personal information in Quebec, goes further in ways that touch AI directly:

- The business must have a person in charge of protecting personal information. If you don't name one, it's the person with the highest authority in the business, usually the owner or CEO.
- A privacy impact assessment (a written check of the privacy risks) is required before taking on a new information system that involves personal information, and before sending personal information outside Quebec. A new AI tool used with client information is likely to fall under the first, and most AI providers process data outside Quebec.
- If you make a decision about someone based only on automated processing of their personal information, you must tell them. On request, you must explain the main factors and let them have a person review it.
- Confidentiality incidents that present a risk of serious injury must be reported to Quebec's privacy regulator, the Commission d'accès à l'information, and to the people affected.

Law 25's provisions are now all in force.

Coming, not yet law. On 15 June 2026 the federal government tabled Bill C-36, which would replace PIPEDA with a new act and a new regulator. At the date at the top of this guide it was still a bill, and it may change. Plan around PIPEDA for now.

For your house rules, in one line: use a business account, keep personal information out unless there's a clear reason and a safe setup, name someone responsible, and write down what you decided and why.



8. Measuring time saved, honestly

Most claims about AI saving time can't be checked. Yours can.

The log sheet. One shared spreadsheet, one row each time someone tries a task:

Date · Name · Team · Task · Minutes the old way · Minutes with AI (including checking) · Used the result? (Yes / Partly / No) · Note

Five rules:

1. **Time the old way for real**, once, before trying AI. A guess from memory isn't a measurement.
2. **Include checking time.** A draft that took 30 seconds to write and 15 minutes to fix didn't save much.
3. **Log the failures.** If someone tried and gave up, write "No". Leaving it out makes the numbers look better and less true.
4. **Don't multiply too early.** "Saved 10 minutes once" isn't "saves 40 hours a year" until it's happened every week for a month.
5. **Check quality.** Ask whoever receives the work if it was as good as before. Time saved on worse work isn't a saving.

At the end of week 4, for each task: add up the minutes saved, divide by the number of times it was done, and note how often the result was used. The tasks with a steady saving and a result people actually used are the ones to keep.

9. Worked examples

These businesses are made up to show how the plan fits different sizes and kinds of work. They aren't Droom customers.

An accounting firm with 12 people

They already ran on Microsoft 365, so they used Copilot Chat with work sign-ins. Champions: a senior accountant and the office manager. They tested summaries of new tax guidance, covering emails for engagement letters, and spreadsheet formula help. Client files were off limits for the month, and the partners agreed to revisit that only after reading their professional body's guidance.

Formula help saved the most time for the least risk. Guidance summaries twice got a detail wrong, so the new rule became "summary for reading, original for quoting". Decision: keep, expand to everyone, add a line about checking every figure against the source.

A group of dental clinics with 60 staff in four locations

They were on Google Workspace, so they used Gemini with admin settings limited to their domain. Champions: one front desk lead per clinic and the head office manager. They tested replies to common patient emails with no names or health details, plain-language rewrites of procedures for new hires, and the staff newsletter.

Front desk staff relaxed once they saw a colleague use it on a real email. The no-health-information rule meant some tasks weren't suitable, and they said so rather than bending it. One clinic is in Quebec, so they took the Law 25 questions to their privacy lawyer before week 3. Decision: keep for internal writing and email drafts; never on patient records.

A restaurant group with 150 staff

They bought ChatGPT Business seats for the managers and head office, about 25 people, not every server and cook, because most floor and kitchen staff don't write documents at work. Champions: a general manager, the head of HR, and the executive chef. They tested recipe-to-prep-sheet rewrites, job postings, staff notices, supplier contract summaries, and Excel help.

Prep sheets saved the most time. The owners used contract summaries as a first read and still read the key clauses themselves. HR kept staff records out. Decision: keep for managers; revisit floor-lead seats in six months.

10. When it goes wrong

What happens	What to do
Someone pasted client or personal details in	Thank them for telling you. Delete the chat. Note what went in, when and who it was about. If it could harm someone, get advice on whether it's a breach you must report (section 7)
The AI gave a wrong fact that went out	Correct it with the person who received it, the same day. Add a "check this" line to that prompt in the library
People stopped using it after week 3	Ask their champion which task they tried. Usually it was a poor first task. Pick one from Prompt B
Answers are bland or generic	The prompt lacks facts. Use Prompt D and give the background
Someone's still using a personal account	Remind them of the rule, kindly. Ask what the business tool can't do for them, and fix that if you can

What happens	What to do
A staff member leaves	Remove their seat on their last day, same as email
A manager wants AI to decide something about a customer or employee	Use it to draft or summarise only. A person decides. In Quebec, see the automated decision rules

11. Common mistakes and fixes

Letting everyone choose their own tool. Data ends up in five places. Fix: one approved tool on business accounts, written into the house rules.

Banning it outright. People keep using it quietly on personal accounts, which is the worst version. Fix: approve a safe way to do it.

Champions chosen for their title. A busy senior person won't help anyone. Fix: pick someone respected and patient, and give them the hour a week.

Measuring enthusiasm, not time. "People love it" isn't a result. Fix: the log sheet, checking time and failures included.

Connecting everything on day one. Letting the tool read all email and files before people know the rules multiplies the risk. Fix: no connections for the first month; add them one at a time after.

Letting AI write straight to customers. A confident wrong answer to a customer costs more than the time it saved. Fix: a person reads everything that goes out. If you later automate customer emails or texts, Canada's anti-spam law (CASL) applies: you need consent (express, or implied through a current business relationship), you must identify yourself, and marketing messages need a working unsubscribe. Check with a professional before you set it up.

12. Quick reference

Printable checklist: the 30 days

- [] Week 1: asked the team what they use already
- [] Week 1: chose one tool on a business plan
- [] Week 1: house rules written, one page
- [] Week 1: a champion named in each team, with an hour a week

- [] Week 1: workspace set up, admin checklist done, champions invited
- [] Week 2: each champion tested two real tasks and logged the minutes
- [] Week 2: prompts that worked are in the library; rules updated
- [] Week 3: everyone invited, rules confirmed in writing
- [] Week 3: a 45-minute session held in every team
- [] Week 4: logs added up, three questions asked in each team
- [] Week 4: decision made and written down; review date set

Never goes in: passwords and financial details, ID numbers, health information, confidential client matters without approval, staff records.

Always: business account, a person checks everything, nothing to customers unread, report mistakes the same day.

Privacy basics: PIPEDA federally; BC, Alberta and Quebec have their own laws. In Quebec, Law 25 adds a named privacy person, impact assessments, rules on automated decisions and incident reporting. Bill C-36 would replace PIPEDA but wasn't law at the date above. Not legal advice; ask a professional.

Honest measuring: time the old way once, include checking time, log failures, wait a month before multiplying.

Want it set up for your business? [Book a free call](#)

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