LAB 7 Worksheet 3: Governance playbook

Type into the boxes, or print this and write on it. To fill it in on a phone, with examples to start from, use the worksheets page: **skillrepos.github.io/tlsaccel**

What this is: a one-page **governance playbook**: seven boxes that say how AI is used where you work, from what is in use today to what is kept on record. In Lab 7 you make one decision and fill in Boxes 1 and 2. Boxes 3–7 are for back at work; in Lab 8 you give each of them a date, on Worksheet 4. Each box says what goes in it and gives an example from a made-up company. Boxes marked **Required** are the ones Lab 7 asks for today; **Optional** ones are for back at work.

LAB 7, STEP 6

My call on the PayFast proposal

Required. PayFast is the invoice agent proposed in Lab 7. Decide as if the proposal were on your desk. There is no example here: this one is your call.

☐ Approve ☐ Approve with conditions ☐ Reject

Because (required)

Two sentences on why. If you chose "approve with conditions", name the conditions: what must change before the agent runs.

The seven boxes

Fill in Boxes 1 and 2 in Lab 7. Boxes 3–7 come after them, for back at work. You leave today with a started playbook, and (after Lab 8) a date on every box that is still open.

LAB 7, STEP 8

Box 1 — Inventory (where is AI used today?)

Required: at least two tools. List two or three AI tools already in use where you work. For each one, give the **tool and what it is used for**, its **owner** (the one person answerable for it; "nobody yet" is a real answer), and the **data it touches** (what information it can see). **Autonomy tier** is how much the tool does on its own. **1 assist:** AI drafts, a person does the work. **2 review:** AI prepares the action, a named person approves it. **3 autonomous:** AI acts, and people check afterwards.

Keep it general. Give owners as job titles, not names. Describe the kind of data ("customer emails"), never the data itself. Describe unapproved use as a habit ("people paste customer emails into personal chatbots"), without saying who does it. No lab step asks you to paste this box into an AI tool, so do not.

Tool / use	Owner	Data it touches	Autonomy tier (1 assist / 2 review / 3 autonomous)

Suspected shadow use: AI tools people use for work without approval

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Examples of a filled-in row: Microsoft 365 Copilot, for email and documents / The head of IT / Email, files, calendar / 1 assist; Meeting note-taker in video calls / Nobody named yet / Everything said in the meeting / 1 assist.

LAB 7, STEP 9

Box 2 — Usage policy headlines (three rules you'd publish this week)

A usage policy is the short list of rules for using AI at work. Write three of those rules as headlines: one line each, plain enough to follow without asking anyone.

Rule 1 (required)
One rule in one line, for example about which AI tools people may use.
Example: Use the tools on the approved list. Anything else needs a yes from the review group first.

Rule 2 (required)
One rule in one line, for example about what information must never go into an AI tool.
Example: No customer, employee or financial data in a personal AI account.

Rule 3 (required)
One rule in one line, for example about who checks AI work before it is used.
Example: You own what you send. Check every name, number and date before it goes out.

BACK AT WORK

Boxes 3–7: the rest of the playbook

No lab step asks you to fill these in today. In Lab 8 you give each of these five boxes a **decide-by date** on Worksheet 4: the date by which you will have settled it. Fill in the rest back at work.

BACK AT WORK

Box 3 — Approval path

The approval path is how a new AI idea gets a yes or a no: it is scored on Worksheet 1, someone checks it for risk, and an answer comes back within a set number of days.

Risk check by (optional)
Who looks at a new AI idea for risk before it is approved: one person or a small group.
Example: The review group (Box 6)

Target turnaround (days) (optional)
How many days someone with a new AI idea should wait for a yes or a no.
Example: 5

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BACK AT WORK

Box 4 — Vendor checks

The questions you will put to every company that sells you an AI tool. Tick the ones you want on your standard list.

- [ ] Do you train on our data?
- [ ] Where is our data stored?
- [ ] How do we leave? (how we get our data out and stop using the tool)
- [ ] Do you support MCP / standard integration? (MCP is the common standard for connecting AI tools to your systems)

BACK AT WORK

Box 5 — Incident path

An incident is AI going wrong: it leaks information, makes something up that gets used, or takes a wrong action. The incident path says who gets the first call.

First call goes to (optional)
The one person or desk anyone can call the moment AI leaks, makes things up or misfires.
Example: The IT help desk

Rehearsed on (date) (optional)
The date you will walk through a made-up incident to test the path.
Example: February 12, 2027

BACK AT WORK

Box 6 — Roles

Who looks after AI use: a named owner for each use, plus a small review group that approves new AI ideas and keeps this playbook up to date.

Review group (optional)
Three to five people from different parts of the organization: job titles are enough.
Example: Dana Ruiz (Support Ops), plus one person each from IT, Finance and HR

BACK AT WORK

Box 7 — Audit trail

The audit trail is the record of what your AI tools did, kept so that someone can check afterwards: what gets logged, who reviews it, and how long the logs are kept.

What gets logged (optional)
What each AI tool records about its own use: for example who used it, when, and what action it took.
Example: Who used the helpdesk add-on, on which ticket, and whether its draft was sent or changed

Who reviews the logs, and how often (optional)
The person or group that looks at those records, and how often.
Example: The support operations manager, on the first Monday of each month

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How long logs are kept (optional)

How long the records are kept before they are deleted.

Example: 12 months

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