



Your first AI workflow · Workbook 1 of 4

AI Use Guidelines Starter

The key decisions a marketing or communications team needs to make before AI use becomes a shared way of working.



Overview

AI guidelines for a marketing or comms team fit on one page. They answer eight key questions, sort the team's work into three tiers, and name one person who keeps them current. Write them as a team in an hour, then revisit them every quarter.

This is a starter, not a legal policy. If your company has an enterprise AI policy, this sits underneath it and translates it into what your team does on a given workday. If your company has nothing, this is the thing you can write without waiting.

Most teams still haven't done it. Sprout Social's 2026 PR statistics put the share of PR teams operating under an official AI policy at 51%.¹ On the internal comms side, Gallagher's readiness index found only 36% of IC functions feel AI-ready, rising to 61% among teams with some governance in place.² Guidelines are the cheapest way to move that number.

51%

of PR teams work
under an official AI
policy

Sprout Social ¹

36%

of internal comms
functions feel AI-
ready

Gallagher ²

61%

feel AI-ready when
governance is in
place

Gallagher ²

39%

of marketers cite AI
data privacy as a
concern

Supermetrics ³



1. Key decisions

Answer these as a team. Short answers are better than long ones. If a question starts an argument, that's the question that most needed asking.

Decision	What it settles	Your answer
1. Which tools	The named tools the team may use for work, and which accounts. Personal or individual accounts, and free accounts especially, are where data leaks usually start.	
2. What never goes in	The categories of information that never get pasted into any AI tool, such as personal data, unreleased financials, client confidential material, employee records, and anything under NDA.	
3. Where AI may draft	The types of work where an AI first draft is fine. The three-tier table in the next section helps here.	
4. Where AI stays out	The types of work that are human-written from the first word, named specifically.	
5. Who reviews what	For AI-assisted work, who checks it and against what, such as facts against the source, voice against the guide, and claims against legal.	
6. Disclosure	When the team tells clients, leadership, or audiences that AI was involved. Many teams land on "disclose when asked, always disclose for images and video."	
7. Accountability	The person whose name is on the work owns it. AI is never the reason something was wrong.	
8. Who keeps this current	One named owner, a review date every quarter, and where the latest version lives.	



2. Three tiers of work

Sort your team's recurring work into these tiers. The tier decides how much review the AI-assisted version gets. Most teams find the exercise takes 30 minutes and settles decisions 3, 4, and 5 at once.

Green

AI may draft, and the owner reviews and sends.

Marketing. Social post drafts from published content, meeting recaps, first-draft briefs, performance report narrative, research summaries, subject line options.

PR and external. Coverage summaries, media list research, first-draft pitch angles, interview prep questions.

Internal comms. Draft FAQs from an approved policy, audience adaptations of an approved message, intranet post drafts, event recaps.

Yellow

AI may draft, and a second named reviewer checks facts and voice before it goes out.

Marketing. Web copy, email campaigns, case study drafts, anything with a claim or a number.

PR and external. Press releases, bylined articles, award entries, statements to trade press.

Internal comms. Leader messages for review by the leader, change announcements, benefits or policy explanations.

Red

Human-written from the first word, though AI may help research or check a finished draft.

Marketing. Pricing or legal claims, regulated product statements.

PR and external. Crisis and holding statements, responses to regulators or legal, anything about layoffs, incidents, or litigation.

Internal comms. Layoff or restructuring notes, anything touching individual employees, leader messages on sensitive topics, HR or legal matters.

The tiers borrow from how Muck Rack frames it for PR teams, which puts crisis messaging, legal disclosures, and thought leadership that relies on a real human point of view in the full-human-authorship column.⁴ Your red list may be longer, but it should never be shorter than the one above.



3. A sample one-pager

Here's what finished guidelines look like for a mid-sized marketing and comms team. Copy it, change the names and tools, and argue about the red list.

How our team uses AI

Last updated October 2026. Owner: [name]. Next review: January 2027.

Tools. Claude Team and Microsoft Copilot on company accounts. Canva AI for images. No personal accounts for work.

What never goes in. Customer or employee personal data. Unreleased financial results or deal information. Anything a client has marked confidential. Anything under NDA. Passwords and credentials. If unsure, ask [name] before pasting.

Green. AI may draft, you review and send. Social drafts from published content, meeting recaps, first-draft briefs, coverage summaries, research summaries, FAQ drafts from approved policy, audience adaptations of approved messages.

Yellow. AI may draft, a second reviewer checks facts and voice first. Web copy, email campaigns, case studies, press releases, bylines, leader messages, change announcements, anything with a number or a claim in it.

Red. Human-written from the first word. Crisis and holding statements. Anything for regulators or legal. Layoffs, restructuring, incidents, litigation. Anything about an individual employee. Leader messages on sensitive topics. AI may help you research or check a finished draft, but it doesn't write the first draft.

Review. Every fact in an AI-assisted draft gets checked against its source. Every voice-sensitive piece gets read against the voice guide. The reviewer's name goes on the approval.

Disclosure. We tell clients and leadership how we use AI when they ask, and we tell them before we start on any engagement where it matters to them. We always say when an image or video is AI-generated.

Accountability. The name on the work owns the work. "The AI got it wrong" is a process note, not an explanation.

Problems. Log anything the tool gets wrong in #ai-notes. [Name] reads it weekly and updates this page when a pattern shows up.



4. Rolling it out and keeping it alive

Guidelines that live in a folder nobody opens are the same as no guidelines. These four things keep them in use.

Write them together

An hour with the whole team, the key questions on a screen, and decisions made in the room. People follow rules they helped write.

Put them where the work happens

Pin them in the team channel and link them from the brand voice guide. Add the tier to the brief template so every piece of work is sorted before it starts.

Read the problem log out loud

Once a week, in standup, say what went wrong and what changed. This is how the guidelines improve and how the team learns the tool is being watched.

Revisit every quarter

Tools change, the team changes, the red list changes. Put the review on the calendar with the owner's name on it, and keep the previous version so people can see what moved.

If you're choosing your first AI workflow at the same time, do the guidelines first. The spec is easier to write once the tiers exist, and the skeptic has already had their say. Part two of this set picks up from here.



Sources

1. Sprout Social, Public relations statistics: trends and data for 2026.
<https://sproutsocial.com/insights/public-relations-statistics/>
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<https://www.aniisu.com/ai-in-ic-what-does-using-it-well-actually-look-like/>
3. Supermetrics, 2026 Marketing Data Report (435 marketers).
<https://supermetrics.com/blog/marketing-data-report-2026>
4. Muck Rack, AI in PR guide and AI compliance checklist.
<https://muckrack.com/resources/guides/ai-in-pr>



This is workbook 1 of 4.

Together, they walk a marketing or comms team from no AI guidelines to one workflow running, measured, and understood by the team.

Workbook 1: AI Use Guidelines Starter (this one)

The key decisions to make before AI use becomes a shared way of working

Workbook 2: Choose Your First AI Workflow

How to pick the one workflow that proves the operating model

Workbook 3: The Workflow Spec

A one-page template that turns a prompt into a workflow

Workbook 4: Telling Your Team About AI

A message kit for leaders rolling AI out to their own team

Want someone to run this with your team? That's the work Austley does. AI training and workflow implementation, AI adoption and change communications, and marketing and comms leadership when you need it. Start at austley.com.

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