ADNET® TECHNOLOGIES
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TOOL 4

Practical AI Guide

The SMB Guide to Practical AI: 10 Ways to Save Time Without Putting Your Business Data at Risk

Are you missing opportunities to save time and improve productivity with AI in your business?

Inside this tool

- 10 practical ways to use AI
- What never to enter into public AI tools
- Basic usage guidelines and an AI Readiness Checklist

Developed by Xplifi, sponsored by ADNET Technologies.
General guidance only. Not legal, compliance, financial or professional security advice.

Getting started with AI, safely

AI tools are becoming part of everyday business software, but many owners aren't sure where to start, which tasks suit AI or how to use it responsibly. These ten practical uses show where AI can save time, with a data-safety note for each one.

1 Draft and improve business communications

How it saves time
Use AI to produce a first draft of emails, letters and announcements, or to tighten wording and adjust tone.

Keep data safe
Leave out client names and confidential details, and have a person check every draft before it is sent.

2 Summarize documents, reports and meeting notes

How it saves time
Ask for a short summary, key points or action items from long documents and notes.

Keep data safe
Only use documents you're allowed to share with the tool, and check summaries against the original.

3 Automate repetitive administrative tasks

How it saves time
Speed up routine work such as formatting, first-pass data entry, templates and checklists.

Keep data safe
Start with low-risk tasks and keep a person responsible for checking the output.

4 Assist with customer service responses

How it saves time
Draft replies to common questions so staff can respond faster and more consistently.

Keep data safe
Don't paste customer personal or account details into public tools; review every reply before it goes out.

5 Organize information and internal knowledge

How it saves time
Turn scattered notes into clear procedures, FAQs and how-to guides your team can find and follow.

Keep data safe
Keep internal documents in approved tools and limit access to the people who need them.

6 Support marketing content and brainstorming

How it saves time
Generate ideas for posts, headlines and campaign themes, then refine them in your own voice.

Keep data safe
Fact-check claims, and make sure the final content reflects your business accurately.

7 Analyze business data and identify trends

How it saves time
Ask for help spotting patterns in sales, scheduling or operational data, or explaining a spreadsheet.

Keep data safe
Remove or anonymize sensitive data first, and verify any figures before acting on them.

8 Improve employee productivity

How it saves time
Help staff plan their day, prepare for meetings or learn a new tool more quickly.

Keep data safe
Give employees approved tools and simple guidance, rather than leaving them to find their own.

9 Know what should never go into public AI tools

How it saves time
Be clear about which information stays out of public AI tools, whatever the task.

Keep data safe
See the list on the next page and share it with your team.

10 Establish basic AI usage guidelines for employees

How it saves time
A short written guideline helps everyone use AI consistently and responsibly.

Keep data safe
Cover approved tools, what data is allowed, who reviews output and who to ask with questions.

What should never go into public AI tools

Unless your organization has approved a tool and confirmed how it handles data, keep these out of public AI tools:

- Customer, patient or client personal information
- Passwords, access codes and account numbers
- Financial records, payroll and banking details
- Employee records and HR information
- Contracts, legal documents and confidential agreements
- Unreleased plans, pricing and other trade secrets
- Anything you are legally or contractually required to protect

Basic AI usage guidelines for employees

- **Use approved tools only**, signed in with company accounts and multi-factor authentication where available.
- **Follow the data list above.** If you're unsure whether something can be shared, ask first.
- **Review everything.** AI can be confidently wrong. A person checks facts, numbers and tone before anything is sent or published.
- **Be open about AI use** where it matters to customers, partners or your own internal processes.
- **Know who to ask.** Name one person who answers questions about AI use and keeps these guidelines up to date.

Check the settings and terms of any AI tool your business uses to understand how it stores and uses the information you enter.

About ADNET Technologies

ADNET Technologies provides Managed IT, Cybersecurity, Cloud and AI + automation services to Connecticut and Capital Region organizations. Its fully managed service, TotalCare, is described as including unlimited remote support via chat, phone or email, 24/7 IT support options, onsite support as needed and proactive system care. ADNET also describes firewall monitoring and management (Foundations Firewall). ADNET lists AI + automation among its services; the guidance in this tool is general and educational.

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Company details as reported by ADNET Technologies.

AI Readiness Checklist

Tick Yes or No for each statement, then count your Yes answers.

1	We know which AI tools our employees are already using.	☐ Yes	☐ No
2	We have approved specific AI tools for business use.	☐ Yes	☐ No
3	Employees know what information must never be entered into public AI tools.	☐ Yes	☐ No
4	We have a written AI usage guideline, even if it's only one page.	☐ Yes	☐ No
5	A person reviews AI-generated content before it is sent or published.	☐ Yes	☐ No
6	We understand how our AI tools store and use the information we enter.	☐ Yes	☐ No
7	Staff use company accounts with multi-factor authentication for AI tools, not personal accounts.	☐ Yes	☐ No
8	We have identified two or three repetitive tasks where AI could save time.	☐ Yes	☐ No
9	Our business information is organized well enough to find what we'd want AI to help with.	☐ Yes	☐ No
10	Someone is responsible for reviewing AI use and updating our guidelines.	☐ Yes	☐ No

8–10 Yes	Ready to expand. Build on what works and review your guidelines as tools change.
4–7 Yes	Ready to start small. Pick one low-risk task and fill the gaps in your No answers.
0–3 Yes	Build the foundations first: approved tools, a data list and a one-page guideline.

Repeat this checklist every six months as your tools and your team's use of AI change.