SYKESYSTEM PUBLISHING · COMPANION RESOURCE

FIELD CHECKLISTS

MONDAY MOVES

For ***AI Rules for Your Business***
by Don Sykes

All fourteen chapters as one checklist: the four-line Short Version and the under-an-hour Monday Moves, with a box to check and a line to date.



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MONDAY MOVES

Every chapter's Short Version and its Monday Moves on one checklist. The Short Version is the chapter in four lines. Each Monday Move is a step you can finish in under an hour. Work down the list in order, check each box, and write the date beside the chapter when it's done.

> **STOP WHERE YOUR COMPANY STOPS**
>
> A small shop can stop after Chapter 12 and still have everything it needs. Chapter 13 is for companies someone outside can make prove it: a regulator, an auditor, or a customer with audit rights. Chapter 14 is for anyone whose software can book, send, or pay on its own.

Part I · Why You Need Rules Now

CHAPTER 1

Are My People Already Using AI?

THE SHORT VERSION

- Assume somebody on your payroll already uses AI for work, probably on a personal phone.
- You can't write rules for what you can't see, so look before you write anything.
- Run the ten-minute anonymous survey this week, and promise out loud that nobody gets in trouble for answering.
- The answers tell you which chapters of this book your company actually needs.

MONDAY MOVES

- ☐ Print the survey, one copy per person, including you.
- ☐ Open Monday's meeting with the amnesty sentence, said out loud.
- ☐ Hand the survey out Monday and collect it in a box by Friday.
- ☐ Tally the results, circle the top three uses, and date the sheet. It's your baseline.

Template: **T-11** Ten-Minute Staff Survey · Done on _____ By _____

CHAPTER 2

Who Answers When the AI Is Wrong?

THE SHORT VERSION

- The tool never answers for anything. A person always does.
- Anything that leaves your company under your name is your company's word, whoever drafted it.
- Name who checks and who signs each kind of work that goes out the door.
- If you can't name that person, the work isn't ready to send.

MONDAY MOVES

- ☐ List the five kinds of paper that leave your building in writing: quotes, invoices, customer emails, proposals, posts.
- ☐ Write one name next to each. That person checks it before it goes.
- ☐ Tell those people today, out loud, that it's their name now.
- ☐ Add one line to your one-page rules: "Anything with a number in it gets read by a person against the source before it leaves. No reader, no send."

Template: **T-1** One-Page AI Rules · **T-4** Output Review Checklist · Done on _____ By _____

CHAPTER 3

Should I Just Ban It?

THE SHORT VERSION

- A ban fails when your people carry the tool in their pocket.
- Ignoring it is worse: the risk keeps growing and nothing gets written down.
- Managing it means a clear yes for some work, a hard no for some data, and a check on the rest.
- Most small companies should start with a narrow yes.

MONDAY MOVES

- ☐ Pick your position out loud: ban, manage, or company tool. Not silence. You've read too far for silence.
- ☐ Write the three jobs where AI gets a yes.
- ☐ Write the three things that never go in.
- ☐ Say all six at the next crew meeting, and date the sheet you wrote them on.

Template: **T-1** One-Page AI Rules · Done on _____ By _____

Part II · Write the Rules

CHAPTER 4

What Goes on the One Page?

THE SHORT VERSION

- One page in plain words beats a binder nobody opens.
- Cover six things: who it covers, which tools for what, what never goes in, what gets checked, what's off limits, and who answers.
- Write rules a foreman can check from the driveway, not wishes.
- Date it, sign it first, and tape it up where the work happens.

MONDAY MOVES

- [ ] Fill in T-1 in 45 minutes, starting from your Chapter 3 lists. Prompt 4.1 in the free Prompt Pack will interview you first, if a blank page slows you down.
- [ ] Have one employee read it out loud and mark any line that confused them. Prompt 4.3 plays a confused new hire if you want a rehearsal first.
- [ ] Fix those lines, put Version 1.0 and today's date at the top, and sign it first.
- [ ] Print it, laminate it, and put a copy in every truck.

Template: **T-1** One-Page AI Rules · Done on _____ By _____

CHAPTER 5

What Can My People Never Paste In?

THE SHORT VERSION

- Green is fine on any tool. Yellow goes only into a company account, after names and numbers come out. Red never goes in, anywhere.
- Codes, passwords, payroll, health details, and a customer's name with an address are red.
- Photos, screenshots, and whole emails carry more than you meant to send. Look at the whole thing before you paste it.
- When in doubt, it's red. Deleting doesn't unsend.

MONDAY MOVES

- [ ] Print T-3 and put a copy in every truck and on every desk.
- [ ] Ask the office which three things they paste most, and give each one a color. Prompt 5.2 in the free Prompt Pack checks a paste for red before it goes anywhere.
- [ ] Open every AI account your people use for work, delete any chat holding red data using that tool's own steps, and check its training setting.
- [ ] At the next crew meeting, run the ten-question drill from Prompt 5.3.

Template: **T-3** Data Traffic-Light Card · Done on _____ By _____

CHAPTER 6

How Do We Catch Mistakes Before the Customer Does?

THE SHORT VERSION

- Anything with a number, a rule, a safety step, or a promise in it gets checked before it goes.
- The checker reads it against the source, never against the AI.
- Higher stakes, more checking: one read for a reminder, two names on a quote.
- If nobody can check it, it doesn't go out.

MONDAY MOVES

- [ ] Write "Numbers. Rules. Safety. Promises." on a sticky note for every desk and every van.
- [ ] Fill in the back of T-4: the source for each of the four, starting with the price book as the only source for prices.
- [ ] Pick one checker for each kind of paper that leaves your building, and set your dollar line for a second set of initials.
- [ ] Run one real draft from this week through Prompt 6.2 in the free Prompt Pack, then check what it flags against your sources. For a quote, Prompt 6.1 holds every number up to your price book.

Template: **T-4** Output Review Checklist · Done on _____ By _____

CHAPTER 7

Which AI Tools Should We Pay For?

THE SHORT VERSION

- Free tools are usually paid for with your data unless you change the settings, and a paid personal plan is still a personal plan.
- A business plan buys three things: your work out of training by default, control of the accounts, and a door that closes the day somebody leaves.
- Work AI lives on company accounts, on company email addresses, never personal ones.
- Check the office software you already pay for first, and keep the approved list short.

MONDAY MOVES

- [ ] Open every AI account your people use for work and check its training setting against the vendor's own help pages. Prompt 7.3 in the free Prompt Pack builds you a walkthrough that works on any tool.
- [ ] Open the admin page of your email suite and find out whether a work AI is already in the plan you pay for.
- [ ] Move work AI onto company accounts on company addresses, and shut off the accounts and shared logins of anyone who has already left. Today, not at the next cleanup.
- [ ] Write your approved list on the one page, and run the four questions on the next tool anybody asks for. Prompt 7.1 reads a vendor's terms page with you; Prompt 7.2 does your seat math.

Template: **T-8** Tool Approval Form · Done on _____ By _____

CHAPTER 8

Do I Really Need to Keep a Log?

THE SHORT VERSION

- Log one line for anything AI helped send out of the building: date, who, tool, what went out, who checked it.
- If an entry takes more than two minutes, it won't get done. Aim for twenty seconds.
- Brainstorming, practice, and drafts that died stay out of the log.
- The log answers "who said that?" a year from now, when memory won't.

MONDAY MOVES

- ☐ Add one field to your job notes or job record: "AI draft, checked by _____."
- ☐ Start the shared sheet from T-5 for work without a job number, and pin it next to your one page.
- ☐ Log the next five things AI helps send to customers. Prompt 8.1 in the free Prompt Pack writes the line in ten seconds.
- ☐ Look at the log Friday and ask the three questions: anything unchecked, any tool off the list, any writer checking their own big-ticket work?

Template: **T-5** Usage Log · Done on _____ By _____

Part III · Make Them Stick

CHAPTER 9

How Do I Roll This Out Without a Fight?

THE SHORT VERSION

- Roll the rules out in one short talk per group, never by memo.
- Field crews get fifteen minutes before the trucks roll. The office gets thirty, hands on.
- Everyone signs the page, and you sign first.
- Lead with what people can do, not just what they can't.

MONDAY MOVES

- [ ] Put the talk on next Monday's schedule and tell the crew it'll take fifteen minutes, not a seminar.
- [ ] Fill in T-10's blanks from your one page tonight. Prompt 9.1 in the free Prompt Pack fits the script to your trade.
- [ ] Give the talk, sign first, and collect signatures the same morning. Prompt 9.2 lets you rehearse the pushback the night before.
- [ ] Build the new-hire packet while the printer's warm. Prompt 9.3 drafts it from your page.

Template: **T-10** Toolbox Talk Script · Done on _____ By _____

CHAPTER 10

What Do We Do When Something Goes Wrong?

THE SHORT VERSION

- Stop the damage first: pull the message back, fix the record, call the customer.
- Report it inside the company the same day, and never punish the person who reports.
- Write down what happened, what you found, what you fixed, and what changed.
- A company that finds and reports its own mistakes gets believed.

MONDAY MOVES

- [ ] Write the five-number call list and keep it with T-6: the owner, the tool person or vendor, your insurance agent with the policy number, a lawyer, and who calls the customer.
- [ ] Ask your agent one question this week, while nothing is wrong: how fast does our policy want to hear about an incident? Write the answer on the list, in days.
- [ ] At the next huddle, say out loud that the same-day line runs on the survey's deal: the first report gets a thank-you and a fix.
- [ ] Walk one past mistake through T-6 as a drill. Prompt 10.1 in the free Prompt Pack turns the notes into the write-up, and since everybody already knows how that story ends, the practice is cheap.

Template: **T-6** Incident Report · Done on _____ By _____

CHAPTER 11

What Do I Tell Customers, Contractors, and My Insurer?

THE SHORT VERSION

- Customers, general contractors, and insurers have started asking about your AI use, in writing.
- Answer with a short true statement and your one page, and never claim more than you do.
- Read every new contract for AI and confidentiality terms before you sign it.
- At renewal, tell your agent how you use AI and ask what the policy now excludes.

MONDAY MOVES

- [ ] Search your top three customer contracts for artificial intelligence and confidential. Prompt 11.2 in the free Prompt Pack explains anything you find in plain English.
- [ ] Call your agent, ask the five questions, and write the answers on the Chapter 10 call list with the date.
- [ ] Draft your five sentences on T-7 and read them out loud. Prompt 11.3 fits them to your trade; the truth test stays yours.
- [ ] Open your own website the way a stranger would and check what the chat says, and whether it admits it's automated.

Template: **T-7** Customer AI Statement · Done on _____ By _____

CHAPTER 12

How Do I Keep the Rules From Going Stale?

THE SHORT VERSION

- Put a thirty-minute AI review on the calendar four times a year, and keep the dates.
- Ask the same seven questions every time: what's new, what went wrong, are the checks still happening, what changed outside, what to add, what to stop, what to rewrite.
- When a line changes, give the page a new version number, read the change out loud, and pull every old copy.
- A boring review is a good review.

MONDAY MOVES

- [ ] Put four review dates on the calendar, a quarter apart, and write the name of who runs them next to each.
- [ ] Look at the top of your page. No version number and date? It's Version 1.0 as of today. Write it on.
- [ ] Set a reminder twelve months out to re-run the Chapter 1 survey, same questions, same promise.
- [ ] Find out whose email address gets your software vendors' update notices, and make it a person who reads mail. Prompt 12.2 in the free Prompt Pack reads the next notice with you.

Template: **T-9** Quarterly Review · Done on _____ By _____

Part IV · When the Stakes Rise

CHAPTER 13

What Changes When We're Regulated or Audited?

THE SHORT VERSION

- Regulated, audited, or contract-bound means someone outside can demand proof, not just effort.
- Build one program to the strictest rule that reaches you, not one program per rulebook.
- The program has five pieces: an inventory, a risk rating, controls, review, and records.
- If nobody outside can demand proof from you, skip this chapter and keep your Chapter 12 habits.

MONDAY MOVES

- ☐ Start the AI inventory: one row per tool and per AI feature inside software you pay for. Prompt 13.1 in the free Prompt Pack interviews you row by row.
- ☐ Write an owner's name next to every row. A row without a name isn't inventoried; it's observed.
- ☐ Map your top five uses to the four functions: govern, map, measure, manage. Prompt 13.2 names what a reviewer would ask for that you can't produce yet.
- ☐ If any tool scores, ranks, or screens people, check it against the laws of every state where those people live, and book the counsel time now, before anyone sends a letter.

Template: **T-2** Acceptable Use Policy · Done on _____ By _____

CHAPTER 14

What About the AI Already Inside Our Software?

THE SHORT VERSION

- AI that acts (books, sends, orders, pays) needs tighter rules than AI that drafts.
- Check every software update for AI features someone switched on for you.
- Give an agent the smallest job, the smallest budget, and a person who approves anything that leaves the building.
- Keep a register of every automation, what it can do by itself, and who owns its off switch.

MONDAY MOVES

- ☐ Open the admin settings in your field service, accounting, and office software, and list every AI feature you find, on or off. Prompt 14.1 in the free Prompt Pack builds the register while you look.
- ☐ Turn off auto-send anywhere it's on.
- ☐ For every AI feature that can book, cancel, send, or pay, switch off each permission you can't name a reason for.
- ☐ Find each off switch, flip it once, and write the date on the register.
- ☐ In your office email system's admin settings, set outside apps to wait for an admin's yes before anyone can connect them to company email, and read the list of apps already connected. The Agent Leash Card in the free downloads has the click paths.
- ☐ Brief whoever answers your phone on the machine-caller rule: posted price, real openings, nothing private. Then open your business listing's settings and decide whether the search engine's automated calls stay on.

Template: **T-12** Automation Register · Done on _____ By _____