



The AI Lever

People First. AI Forward.



Introduction

WHY WE BUILT THIS

Every business owner we talk to is navigating the same tension.

AI is already in your business. Your team is using it; some visibly, some not. And most of you are managing it the way we did at first: a loose set of expectations, a lot of trust, and a nagging concern that individual approaches were becoming a company problem.

That concern is valid. Not because AI is dangerous, but because without a framework, you have no way to know whether it's being used in a way that protects your clients, your quality, or your reputation.

We built this for ourselves first. Then we started sharing it with the businesses we work with, and the response was always the same: *I wish I'd had this earlier.*

This isn't a policy document. It's a working system; the standards, tools, and conversations that let you lead AI in your business rather than just allow it.

People first. AI forward.



The AI Authority Framework

Most businesses don't have an AI problem. They have a delegation problem. AI has been handed to teams the way you'd hand a new employee a full set of keys on day one - with good intentions and no framework for what they should do with them.

Here's how to fix that.

	Level 1: Full Autonomy	Level 2: Inform After	Level 3: Consult Before	Level 4: Owner Only
How it works	AI operates independently. Periodic oversight only.	AI assists, people review before anything moves.	People-led. AI supports only where explicitly decided.	AI never enters this space. No exceptions.
At The Lever	Automated scheduling, data formatting, content routing.	Draft content, research synthesis, email improvements.	Client strategy, positioning, anything requiring our point of view.	Personal identifiers, confidential client information, absolute accountability.
In your business	Appointment scheduling, report formatting, data entry, invoice processing.	Proposal drafts, meeting summaries, social content, internal comms	Client-facing strategy, sensitive communications, creative direction.	Client personal data, HR matters, legal documents, confidentiality agreements.
The standard	No client data. No client-facing output. No judgement calls.	Eyes on everything. AI is the starting point, never the finished product.	Your judgement leads. AI does not fill gaps or contribute to the thinking.	If you're unsure whether something belongs here, it does.

In “Team Communication” we'll cover how to share this with your team, and how to make it stick.

Approved Tools & Privacy Standards

Not all AI tools are created equal, and the difference that matters most isn't features. It's what happens to your data.

As a rule of thumb: **free tools own your data**. When there's no cost, the product is usually you; your inputs, your content, your client information. Paid tools aren't automatically safe, but they're where your assessment should start.

Here's what to look for before you approve any tool in your business.

PRIVACY POLICY CHECKLIST

Before any tool is approved, check the following:

Question	What you're looking for
Does this tool train its models on my data?	It should not. Look for explicit opt-out or confirmation that your data is never used for training.
Where is my data stored?	Jurisdiction matters. Know where your data lives and whether that creates any compliance risk.
Is my data shared with third parties?	It shouldn't be without your explicit consent.
Can I opt out of data collection?	You should be able to. If you can't, reconsider the tool.
Is there a business or enterprise tier with stronger protections?	Free tiers often have weaker data protections than paid plans on the same platform.
What happens to my data if I cancel?	Data should be deletable. Know the process before you're in it.
Has a human reviewed this policy – not just accepted it?	Someone in your business needs to have actually read it.

THE LEVER'S APPROVED TOOLS REGISTER

This is an excerpt of our current stack. Use our example as your starting point, your register will reflect your own business.

Tool	Approved For	Not Approved For	Privacy Checked	Data Storage	Paid
Claude	Marketing content, copywriting, content improvement	Client data, strategy, Level 3-4 work	✓	US (Anthropic)	Yes
Gemini	Research, drafting, thought partnership	Client data, confidential work	✓	US (Google)	Yes
NotebookLM	Team knowledge base, trained sources, research synthesis	Client personal data	✓	US (Google)	Yes
Zapier	Automated workflows, low-level repeatable tasks	Client personal data, financial processing	✓	US	Yes
n8n	Advanced automation, AI agent workflows	Client personal data, confidential data	✓	Self-hosted / EU	Yes
Hubspot AI	Email suggestions, CRM summaries, marketing workflows	Client confidential data, strategic advice	✓	US (HubSpot)	Yes
Zoom AI	Meeting summaries	Client meetings without explicit consent	✓	US (Zoom)	Yes

Use this example to build your own. Review it every six months, tools update their privacy policies and your stack will evolve.

Add a tool. Remove a tool. Date your reviews. Make it a living document, not a one-time exercise.



The Use Case Log

When AI use lives in individuals' heads, it leaves the business with them. The Use Case Log turns individual experimentation into company knowledge, a record of what's working, what's been approved, and what the business has learned.

One person owns it. At The Lever, that's our Business Operations Manager. In a smaller business, it's whoever keeps the wheels turning. The point is that someone is responsible for it - not everyone, and not no one.

This isn't a compliance document. It's a record of how your business is getting smarter about AI, and how your people are getting more time to do the work that actually matters. Because that's the point. AI handles the mechanics. Your people do more of what they're genuinely good at; more time with clients, more strategic thinking, more expertise-led work. The log tracks both sides of that equation.

THE STAGES

Stage	What it means
Proposed	An idea for an AI use case. Not yet tested.
Testing	Being trialled. Not yet approved for regular use.
Approved	Tested, reviewed, and cleared for use in the business.
Review	Previously approved but flagged for reassessment.

THE LOG

Date	Owner	Use Case	Link	Stage	Time Saved	Cost Saved	Quality Impact	People First

- **Date:** When the use case was first logged.
- **Owner:** Who is responsible for this use case. One person, not a team.
- **Use Case:** What AI is being used to do. Be specific i.e. "drafting client proposals" not "content."
- **Link:** Link to the workflow, document, or process so it's never lost with an individual.
- **Stage:** Where this use case sits: Proposed / Testing / Approved / Review.
- **Time Saved:** Estimated time saved per use. Even a rough figure is useful.
- **Cost Saved:** Where quantifiable. Not every use case will have a direct cost saving.
- **Quality Impact:** What got better, not just faster. Where did the output improve? Where did it fall short?
- **People First:** What did your people do with the time AI freed up? *This is the column that matters most.*



Quality Standards

AI produces confident output. That doesn't make it correct, complete, or ready. Quality control isn't a step you add at the end, it's a habit built into how your team works. These two checks make that practical.

THE GOVERNANCE CHECK

Did we do this right?

Before anything leaves the desk, confirm:

- A person has written or substantially rewritten this, not just edited it.
- This contains no client data, personal identifiers or confidential information.
- AI was used within its approved level of authority for this task.
- All facts, figures and references have been verified independently.
- You would be comfortable if the client knew how this was made.

THE QUALITY CHECK

Is this the best it can be?

Use these prompts to challenge the output before you accept it. Some are questions for the AI. Some are questions for you.

Prompt

What have we missed?	→ AI
What assumptions have you made that I should verify?	→ AI
Where are you least certain in this response?	→ AI
What would a senior expert in this field push back on?	→ AI
Where in this does my expertise or opinion need to replace your answer?	→ You
Does this sound like us – our voice, our point of view, our expertise?	→ You
Am I accepting this because it's good, or because checking feels like it defeats the point?	→ You

The Team Conversation

You've built the framework. Now you need your team to use it.

This is where most businesses stall. Not because the framework isn't good, but because it lands as a policy instead of a conversation. Your team hears "new rules" when what you mean is "I've got your back."

Getting this right matters. So before you call the first meeting, understand what's on both sides of the table.

WHAT YOU'RE BRINGING INTO THE ROOM

As a business owner, your concerns are real and legitimate:

Individual use is invisible

Without a shared framework, every team member is making their own decisions about what AI touches, what tools they use, and what gets checked. That's not their fault, it's a gap in leadership. This framework closes it.

Compliance isn't optional

Cyber security insurance policies, client confidentiality agreements, and data protection obligations don't bend because AI is convenient. If something goes wrong, the business wears it - not the individual who used the wrong tool.

You want to leverage AI

Not just manage the risk, actually get the benefit. A shared framework means your whole team moves forward together, not in ten different directions.



WHAT YOUR TEAM IS BRINGING INTO THE ROOM

Assume your team is thinking at least one of these:

"Is this because they don't trust me?"

No. It's because you do, and you want to protect them. Individual approaches leave individuals exposed. A company framework means nobody has to navigate this alone.

"Am I going to lose my job to AI?"

This is the fear underneath most resistance, even when it's not said out loud. Address it directly. AI at your business handles the mechanics, the repetitive, low-level work that consumes time and dulls the work your people are actually good at. The Use Case Log tracks what gets reinvested in people, not just what gets saved.

"I'm already using it fine."

Maybe. But fine for one person isn't the same as right for the business. The framework isn't a reflection on individual judgement, it's how you build a consistent standard everyone can rely on.

"I don't really need (or like) AI."

Curiosity isn't optional here, it's part of how we work. We're not asking everyone to become an AI expert. We're asking everyone to stay open, ask questions, and be willing to try. The businesses that thrive through this shift won't be the ones who used AI the most, they'll be the ones who stayed curious and kept learning. That's the standard we hold ourselves to at The Lever, and it's the standard we're asking of our teams.



HOW TO HAVE THE CONVERSATION

If you follow The Lever's approach: governance as a team, use cases one-on-one.

Session 1: The Team Conversation

Bring everyone together. Keep it short. Lead with why.

Talking points:

- "AI is already part of how we work and that's not going to change. What we're doing today is deciding, together, how we use it."
- "This framework isn't about policing what you do. It's about making sure we're all protected - you, our clients, and the business."
- "Our compliance obligations as a company are real. This is how we meet them without making your work harder."
- "The goal is simple: AI handles more of the mechanics, so you get more time for the work you're actually here to do."

Walk them through the Authority Framework. Ask for questions. Make it a conversation, not a briefing.

Session 2: The One-On-Ones

Follow up individually. Ask each person:

- "Where are you already using AI in your work?"
- "What's working well?" "Where do you feel uncertain or unsupported?"
- "What would make your role better if AI could handle it?"

This is where you find your best use cases, and where your team feels genuinely heard. Log what comes out of these conversations. The best ideas will come from the people doing the work.



MAKING IT STICK

A single conversation won't do it. What makes the framework part of how your business works.

Own it at the top	If the business owner doesn't follow the framework, nobody will.
Revisit it regularly	Quarterly is enough. AI is moving fast – your standards need to keep up.
Celebrate the wins	When AI frees someone up to do better work, name it. The People First column in your Use Case Log is where this lives.
Make it safe to raise concerns	If someone spots a risk or isn't sure whether something is appropriate, they need to be able to say so without it feeling like a problem.

Have the conversations. About the things that concern your team; privacy, over-reliance, the environmental footprint of AI at scale. And about the things that excite them; new opportunities, capability they didn't have before, work that's more interesting because the mechanics are handled.

These conversations matter. A team that's thought through both sides will use AI more intentionally than one that's just been handed a framework and told to get on with it.

The businesses that thrive through this shift won't be the ones who used AI the most. They'll be the ones who stayed curious, kept asking questions, and built something together.



Where to next

You now have the framework. What happens with it depends on where you are.

SELF DIAGNOSTIC TOOL

Not sure where your biggest gaps are? *The Governance Gap* diagnostic takes five minutes and shows you exactly where your business stands across seven risk areas: visibility, data handling, IP exposure, quality oversight, consistency, governance, and ownership.

[Click here to start](#)

RATHER HAVE IT BUILT FOR YOU?

If the priority isn't learning how to do this, it's getting it done, let's talk.

A short call with Justine is enough to understand where your business is, what the gaps are, and what done-for-you support makes sense. No agenda. No pitch. Just a straight conversation about what you actually need.

[Book your call](#)



THE LEVER AUSTRALASIA LTD

The Lever works with founders of businesses who want clarity, control, and sustainability as complexity increases.

We help founder-led businesses move from being held together by the founder to being supported by clear structure, strong systems, and capable people.

Our work sits across leadership, operations, and strategy, helping founders design businesses that can grow, adapt, and make good decisions without everything flowing back to them.

Because real leverage doesn't come from working harder or chasing the next trend. It comes from building a business that's designed to work.

→ For more information go to: www.thelever.co.nz

