



IT

CONNECTING AI TO YOUR BUSINESS?

Pilot permissions, approvals and workflows before wider use



PLUG-AND-PLAY DOES NOT MEAN RISK-FREE

BUSINESS CASE

- ☐ Define the specific problem to solve
- ☐ Choose one workflow only
- ☐ Define success criteria before starting
- ☐ Name the person responsible

DATA

- ☐ List required information
- ☐ Remove unnecessary data access
- ☐ Check data quality in connected systems
- ☐ Identify confidential data

PERMISSIONS

- ☐ Use named accounts — not shared admin
- ☐ Enable MFA on all connected accounts
- ☐ Apply least privilege throughout
- ☐ Avoid broad-access connector accounts

ACTIONS

- ☐ Keep all outputs in draft initially
- ☐ Define approval thresholds explicitly
- ☐ Prevent unrestricted payment actions
- ☐ Prevent automatic external sending

TESTING

- ☐ Test with normal, typical records
- ☐ Test with incomplete or missing data
- ☐ Test with duplicate records
- ☐ Test with unusual edge cases
- ☐ Record every error

SECURITY

- ☐ Review data-processing terms
- ☐ Check data retention settings
- ☐ Confirm audit logs are available
- ☐ Confirm offboarding process
- ☐ Confirm emergency disable works

REVIEW

- ☐ Measure time actually saved
- ☐ Review approver feedback
- ☐ Review incidents and errors
- ☐ Decide to expand, amend or stop

BEFORE YOU CONNECT

- ☐ Can connectors be disabled quickly?
- ☐ What happens when staff leave?
- ☐ Is there a manual fallback?
- ☐ When will the workflow be reviewed?

THE EASIER AI IS TO CONNECT, THE MORE IMPORTANT IT IS TO CONTROL WHAT IT CAN SEE AND DO.



