

AI Client Disclosure Pack Guide

A practical setup guide for agencies, consultants, and service firms that use AI tools in client work and need clearer client-facing boundaries.

Best for

Agencies,
consultants,
freelancers

Setup time

30-45 minutes for a
first policy

Important limit

Templates, not
legal/privacy advice

Start Here

1. Open `templates/ai-acceptable-use-policy.md` and decide which AI uses are allowed, reviewed, or prohibited.
2. Open `templates/data-classification-do-not-paste-guide.md` and customize the red/yellow/green data rules.
3. Open `templates/ai-vendor-register.csv` and list every AI tool used in client work.
4. Open `templates/client-ai-disclosure-clause.md` and choose the light disclosure, contract clause, or project approval format.
5. Have team members sign `templates/staff-ai-acknowledgement.md` before using AI on client work.

Client Conversation Map

Client Question	Best Template
Do you use AI on our work?	Client AI disclosure clause

What data goes into AI tools?	Data classification guide and AI vendor register
Do humans review AI output?	Client AI FAQ and acceptable-use policy
Can we opt out?	Client disclosure clause with opt-out wording
Who approved this tool?	AI risk review checklist and vendor register

Safety Checklist

- No sensitive client data pasted into AI tools by default.
- No claim that AI outputs are always accurate.
- No claim of legal, privacy, or compliance approval.
- No new AI vendor used before terms are reviewed.
- No final client deliverable sent without human review.

Important Disclaimer

This pack is a documentation template pack. It is not legal advice, privacy advice, cybersecurity advice, employment advice, compliance certification, or permission to use client confidential or regulated data in AI tools.