

AI governance checklist for agencies

A one-page framework to complete with your delivery lead. Share with clients or prospects upon request.

1. Data confidentiality

- Written list of approved AI tools, with documented data retention terms for each.
- Client data is classified (public, internal, confidential, regulated), with defined rules for which tiers can be used in which tools.
- No client data is entered into a free-tier consumer AI tool. Only enterprise accounts with zero-retention terms are used for client material.
- Written policy on whether and how developers may use AI coding assistants on client code, specifying which tools are approved.
- All team members using AI on client work have read and attested to this policy.

2. Attribution and transparency

- Default position on AI disclosure: AI involvement flagged for final client-facing output (copy, imagery, code); not for internal research, ideation, or first drafts.
- AI involvement discussed at project kickoff, not just at project close.
- Disclosure standard adaptable to client preference on request.

3. Quality control and human oversight

- Every AI-assisted deliverable reviewed by a named human before client delivery.
- Review step explicitly included in the project plan.
- Reviewers briefed on what to check: factual accuracy, brand voice, technical correctness, and known AI limitations.
- Every AI-generated code commit peer-reviewed for logic, security, and license compliance.

4. Client communication standards

- AI use discussed at kickoff with every new client.
- The scope of AI involvement stated in the statement of work (SOW).
- MSA addresses IP ownership of AI-generated work, indemnification, and what counts as a derivative deliverable.
- Any change to AI use or project scope mid-project surfaced to the client before it lands in a deliverable.
- Project leads communicate a consistent policy; clients get the same answer regardless of who they ask.

5. Regulatory awareness

- Regulated sectors client identified (healthcare, finance, legal, education, government).
- Each client's compliance position on AI tooling confirmed in writing.
- Stack meets requirements, or gaps are documented and discussed with the client.
- Regulatory requirements and questions surfaced and addressed at project kickoff.

Share this checklist with your team. When a client asks how you handle AI, provide a completed copy.

Last reviewed on: _____