



The SME Artificial Intelligence Strategy & Governance Master Plan (2026 Edition)

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Executive Strategic Overview

In 2026, Artificial Intelligence is no longer a "plugin"—it is the engine of modern business. However, for most SMEs in South East London, "Shadow AI" (employees using unmanaged tools) represents a catastrophic risk to data privacy, professional liability, and brand reputation.

This Master Plan is designed to move your business from "unregulated usage" to "strategic excellence."

How to use: This is an exhaustive framework. Review each section, populate the specific tool lists in Section 3, and implement the "Human-in-the-Loop" (HITL) requirements in Section 5.

1. Core Philosophy: The "Responsible AI" Principles

Setting the ethical and operational baseline for your organization.

- **Transparency:** We will always be open with our clients in Bromley, Greenwich, and beyond about when and how AI is used in our deliverables.
- **Accountability:** AI is a tool, not an employee. A human remains 100% responsible for every output, email, and decision influenced by AI.
- **Privacy-First:** We prioritize the protection of client Personal Identifiable Information (PII) above all productivity gains.
- **No Bias:** We actively audit AI outputs to ensure they do not reflect or amplify societal

biases.

2. Data Classification & The "Billboard" Rule

Defining exactly what can and cannot be fed into an AI model.

🚩 **THE GOLDEN RULE:** Never input data into a public AI tool that you would not be comfortable posting on a public billboard in the middle of Bromley High Street.

- **Level 1: Public Domain Data**
 - *Includes:* Public marketing copy, generic industry news, public event details.
 - *AI Usage:* **Fully Permitted** for summarizing, tone-shifting, and brainstorming.
- **Level 2: Internal Business Data**
 - *Includes:* Internal handbooks, non-sensitive memos, generic process documents.
 - *AI Usage:* **Restricted.** Requires use of "Enterprise-Wrapped" tools only (No personal accounts).
- **Level 3: Highly Sensitive / Protected Data**
 - *Includes:* Client PII, Bank details, Legal strategies, Intellectual Property, Trade secrets, Medical records.
 - *AI Usage:* **STRICTLY PROHIBITED** unless using a dedicated, air-gapped, or "Zero-Training" Enterprise instance approved by Simply Solutions.

3. The Approved "Tech Stack" (2026 Audit)

Staff are strictly forbidden from using any AI tool not listed below.

Tool Category	Approved Platform	Usage Condition
General LLM	e.g., Microsoft 365 Copilot	Must use Company Login (Enterprise)
Research/Analysis	e.g., Perplexity Enterprise	No client PII allowed in queries
Creative/Design	e.g., Adobe Firefly	Commercial use license only
Coding/Dev	e.g., GitHub Copilot	Prohibited for core security modules

4. Prompt Engineering & "Injection" Security

Preventing the accidental leak of data through "Prompt Leaks."

- **[] Zero-Training Toggle:** Ensure that "Use data for training" is turned **OFF** in all admin settings.

- **Anonymization Protocol:** All prompts must be stripped of specific names, addresses, or identifiers before being submitted.
- **Prompt Injection Defense:** Staff are trained to recognize "Jailbreak" prompts that might try to force an AI to reveal internal company instructions.
- **No "Copy-Paste" of Full Files:** Staff are prohibited from uploading full CSVs or sensitive PDFs to public AI "Chat with your PDF" tools.

5. Quality Control: The "Human-in-the-Loop" (HITL) Mandate

AI-generated content is a draft, never a final product.

- **The Hallucination Check:** Every fact, statistic, or legal citation generated by AI must be cross-referenced with a primary source.
- **The Tone Check:** AI tends to sound "robotic" or overly formal. Staff must edit for the "Simply Solutions" human voice.
- **The "Sign-Off" Requirement:** All AI-assisted client reports must be signed off by a Senior Manager who has reviewed the AI-to-Human ratio of the work.

6. Prohibited Use Cases (The "Red Lines")

Under no circumstances shall AI be used for:

-  **Performance Reviews:** AI must not be the primary tool for grading staff or making hiring/firing decisions.
-  **Unsupervised Legal/Contractual Work:** Generating binding contracts without qualified legal review.
-  **Automatic Email Replies:** Setting up "Auto-Bots" that talk directly to clients without a human gatekeeper.
-  **Security Bypassing:** Attempting to use AI to "crack" or probe the company's own network vulnerabilities.

7. Deepfake & Social Engineering Defense

In 2026, "Verification" is the only defense against AI-driven fraud.

- **Voice Verification:** If a Director or Client requests a bank transfer via a "Voice Note" or phone call, staff must call them back on a verified number.
- **The "Safe Word" Protocol:** High-stakes departments (Finance/Operations) must use a pre-arranged, non-digital safe word to verify identity in emergency scenarios.
- **Video Authentication:** Be wary of unusual video calls. If a caller's movement seems "laggy" or their features "glitch," treat it as a Deepfake attempt.

8. Vendor & Supply Chain Governance

Your security is only as strong as the AI your partners use.

- **Third-Party Audit:** We require all key vendors (Accountants, Web Designers, HR) to provide their own AI usage policy.
- **API Security:** If we integrate AI into our website or CRM, Simply Solutions must perform a

monthly API security audit.

9. Staff Acknowledgment & Training

I, [Employee Name], acknowledge that I have read the **Simply Solutions AI Strategy & Governance Master Plan**. I understand that my usage of AI will be monitored for compliance and that data leaks caused by negligence may result in disciplinary action.

Signed: _____

Date: _____

10. The AI Maturity Scale: Where Do You Sit?

Stage	Description	Action
Level 1: Chaotic	Staff use free ChatGPT accounts; no oversight.	CRITICAL RISK - Contact us today.
Level 2: Reactive	Some policies exist, but usage is inconsistent.	Implementation of this Master Plan.
Level 3: Governed	Enterprise tools are in place; staff are trained.	Quarterly strategy reviews.
Level 4: Optimized	AI is driving 20%+ ROI with zero data leaks.	This is the Simply Solutions Gold Standard.

Need a Fractional CTO to Lead Your AI Transition?

Implementing AI safely requires more than a PDF; it requires a strategic partner. We can help you deploy **Microsoft 365 Copilot**, secure your data, and train your team.

Contact the Simply Solutions Team:

-  Serving Bromley, Greenwich, Lewisham & Beyond
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