Getting started with AI: a guide for business owners

A practical way to start using AI in an Australian business: pick one task, check your information, set simple rules for staff, and test results before relying on them.

AI tools can draft documents, answer customer questions, summarise meetings, sort enquiries and spot patterns in your numbers. They can also produce confident answers that are wrong, and expose information that should have stayed private. The businesses that get value from AI usually start small, with a clear task and some simple rules.

Step 1: pick one task, not "AI"

"Use AI to improve productivity" is too broad to act on. Instead, choose one repeated task that takes real time, such as:

- Drafting replies to common customer emails
- Summarising long documents or meeting notes
- Sorting and routing new enquiries
- Writing first drafts of product descriptions or social posts
- Pulling figures together for a weekly report

Write down how the task works today, how long it takes and what "better" would look like. That gives you something to measure.

Step 2: check the information the task depends on

AI is only as good as the information it works with. Before connecting a tool to your business information, ask:

- **Who owns this information,** and who can say whether it's right?
- **Is it accurate and up to date?** Old price lists and outdated policies lead to wrong answers.
- **Is it clear what things mean?** If your team uses terms differently, the AI will too.
- **Who should be able to see it?** If an AI tool can read a folder, anyone using that tool may be able to get answers from it.

Our free AI Ready Data Strategy Scorecard walks through these questions for one area of your business in about five minutes.

Step 3: set simple rules for staff

Many people are already using AI tools at work, with or without permission. Clear guidance is better than silence. Agree and share:

- **Which tools are approved** for business use, and which aren't
- **What must never be entered,** such as customer personal information, passwords, financial details or confidential client material, unless the tool is approved for it
- **When a person must check the output** before it's used or sent
- **Who to ask** when someone wants to use AI for something new

Keep it to a page. Update it as tools change.

Step 4: test before you rely on it

- **Try it on real examples,** including tricky ones, and compare the output with what a skilled person would produce.
- **Decide in advance what "good enough" means,** and who decides.
- **Plan for mistakes.** Who checks the output, and what happens when it's wrong?
- **Start with a person in the loop.** Let AI draft and a person approve, before letting anything go out automatically.
- **Measure the result** against how the task worked before.

Step 5: use the government's guidance

The National AI Centre published the Guidance for AI Adoption in October 2025. It sets out six essential practices for using AI responsibly, with a simpler foundational version for organisations just starting out, plus templates such as an AI policy guide and an AI register. It's free at industry.gov.au.

Privacy

If AI tools handle personal information about customers or staff, the Australian Privacy Principles may apply to your business. The Office of the Australian Information Commissioner has guidance on using commercially available AI products at oaic.gov.au.

Common mistakes

- Buying an AI product before deciding what problem it should solve.
- Connecting AI to every shared drive at once, including old and conflicting documents.
- Trusting output because it sounds confident.
- Having no rules, so staff paste customer information into personal accounts.

Where Blend can help

Take the free AI Ready Data Strategy Scorecard for a practical view of your strengths and gaps, then book a results review to turn it into a plan. See also our AI and automation services.

This guide is general information, not professional advice for your situation. Read it online and find more free guides at www.blend-datastrategy.com/tools.