The Briefing

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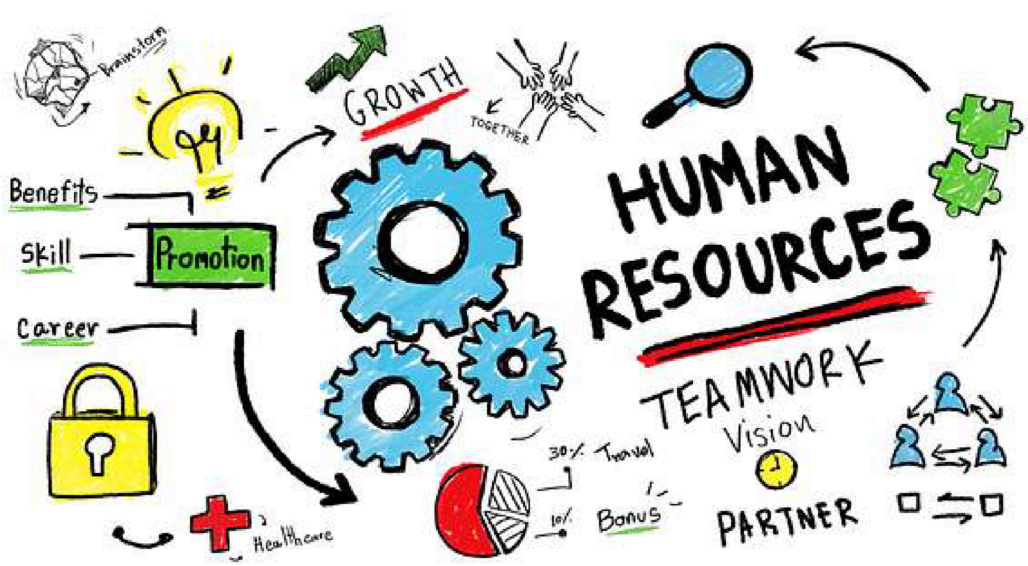
Updates and analysis from the Government & Leadership Office of the Venice Area Chamber of Commerce

INSIDE



Demystifying AI Week 4 of 6

AI for Administration, HR,

and Business Policy

What We Cover This Week

AI is reshaping how businesses manage people, policies, and day-to-day operations. This week focuses on practical AI uses in recruiting, onboarding, training, retention, policy development, and administrative workflows — along with the governance safeguards every business should establish before AI use becomes routine.

1. Learning Objectives

- Understand how AI is transforming the key stages of the employee lifecycle — from recruiting through retention — and where AI assistance is most appropriate
- Learn how to use AI tools to draft, update, and maintain core business policy documents — including employee handbooks and compliance frameworks
- Understand the role of AI in contract and document management, including appropriate boundaries and human review requirements
- Identify administrative workflows where AI can reduce overhead and improve consistency
- Develop a foundational AI Acceptable Use Policy (AUP) framework appropriate for your organization's size and risk profile

2. Session Overview

The human side of AI adoption is often the most underestimated — and the most consequential. Executives often focus first on customer-facing or operational tools, but the way AI intersects with the workforce, employment practices, and organizational governance will determine whether adoption strengthens the business or creates unintended legal, ethical, and cultural risks.

This session follows two parallel tracks: how AI can improve HR and administrative efficiency, and how to build the policy infrastructure that protects your business, employees, and customers as AI becomes more embedded in daily work.

3. Core Content Areas

a. AI in Human Resources — The Employee Lifecycle

Recruiting: AI-powered applicant tracking systems (ATS) can screen resumes, compare candidates against job requirements, schedule interviews, and generate structured interview questions – reducing the administrative burden of hiring. Tools like **Workable**, **Greenhouse**, and AI features within **LinkedIn Talent** can bring these capabilities to businesses of different sizes. Important caveat: AI-powered resume screening must be used with explicit attention to bias risk. Training data that reflects historical hiring patterns can perpetuate discriminatory outcomes. Human review, documented oversight, and periodic testing are essential safeguards for managing legal, ethical, and reputational risk.

Onboarding: AI can personalize new employee onboarding by curating learning paths, generating role-specific training content, and automating the administrative checklist items (document collection, system access provisioning, benefits enrollment prompts) that typically consume HR staff time. Platforms like **BambooHR** and **Rippling** offer AI-enhanced onboarding workflows accessible to small businesses.

Training & Development: AI-powered learning management systems can assess individual skill gaps, recommend targeted training content, and adapt learning paths based on progress. For businesses that invest in team development, this represents a meaningful step up from generic, one-size-fits-all training programs.

Retention Analytics: Employee turnover is one of the most costly challenges facing small businesses. AI-powered people analytics tools can analyze engagement survey data, attendance patterns, performance trends, and other available signals to identify potential retention risks – helping leaders spot patterns earlier and consider proactive interventions before employees decide to leave.

b. Policy Development with AI — Drafting and Maintaining Documents

Business policy documentation – employee handbooks, codes of conduct, ADA accommodation policies, remote work guidelines, and AI-use policies – is essential for protecting the business and creating a consistent employee experience. It is also time-consuming and often out of date. AI can accelerate the drafting and maintenance of these documents.

With tools like ChatGPT or Claude and carefully constructed prompts, business owners can generate first drafts of employee handbook sections, update existing policies for review, and create checklists for policy compliance discussions. **Critical reminder:** All AI-generated legal and policy documents must be reviewed by a qualified HR professional or employment attorney before distribution. AI provides speed and structure; professional review provides legal protection.

Pro Tip

One high-value use of AI for small business owners without dedicated HR staff is generating a current-state audit of an employee handbook. Ask an AI tool to identify common Florida and federal handbook gaps, then compare those findings against current policies. It will not replace a lawyer – but it can make the conversation with an employment attorney more efficient, focused, and targeted.

c. Contract & Document Management

For professional services firms, real estate businesses, contractors, and any organization that regularly creates or reviews contracts, AI document management tools can offer meaningful productivity and risk-reduction benefits. These tools can summarize lengthy contracts, flag non-standard or high-risk clauses, track document versions, and organize executed agreements in searchable repositories.

Tools like **DocuSign AI** and **Ironclad** bring AI-powered agreement workflows to businesses that need to manage contracts more consistently. Online notarization and e-signature platforms can also streamline document execution workflows, though they should not be presented as substitutes for legal review. For more general document summarization, Claude and ChatGPT can extract key terms, deadlines, and obligations from uploaded contracts – giving non-attorney business owners a faster path to understanding what they are signing. Again, significant legal documents require attorney review – but AI can reduce the time involved in preparing for that review.

d. Administrative Workflow AI — Meeting Summaries, Email Triage, and Scheduling

Administrative overhead – managing email, capturing meeting notes, scheduling, and maintaining records – consumes a disproportionate amount of leadership time in small businesses without dedicated administrative support. AI tools are especially useful in this area.

Otter.ai and **Microsoft Copilot for Teams** can transcribe and summarize meetings, extract action items, and capture key decisions, depending on the tool, licensing, meeting settings, and transcription configuration. **Gmail's AI features** and **Microsoft Copilot for Outlook** can help triage email, draft responses, and summarize lengthy threads. For small business owners wearing multiple hats, even modest daily time savings can add up to meaningful leadership capacity over a year.

e. Building an Internal AI Acceptable Use Policy

Before employees begin using AI tools – or if they have already started without organizational guidance – your business needs a foundational AI Acceptable Use Policy (AUP). This policy sets clear expectations for how AI tools may be used, what data protections apply, and what oversight is required.

An AI AUP does not need to be a lengthy legal document. For many small businesses, a well-structured two-to-four-page policy can be a practical starting point for establishing a governance foundation. Here is a guide:

4. Template Preview: AI Acceptable Use Policy Outline

📄 **AI Acceptable Use Policy – Framework Outline (Adapt for Your Business)**

Section 1: Purpose & Scope
State the purpose of the policy. Identify which employees it applies to and which AI tools it covers. Note that the policy applies to AI tools used for any business purpose, whether on company or personal devices.

Section 2: Approved Tools & Platforms
List AI tools that are approved for business use. Establish a process for requesting approval of new tools. Prohibit use of unapproved AI platforms for business purposes.

Section 3: Prohibited Uses
List uses that are explicitly prohibited: entering confidential client data into public AI platforms without appropriate data processing agreements; using AI to generate content that misrepresents company policies; using AI for any illegal purpose; representing AI-generated output as original human work without disclosure where required.

Section 4: Data Protection Requirements
Specify what categories of data may NOT be entered into AI tools: personally identifiable information (PII) of clients or employees, financial account data, health information, trade secrets, and confidential business strategies.

Section 5: Human Review Requirements
Establish that AI-generated content – especially for external communications, legal documents,

financial reporting, and HR decisions – requires human review before use. Identify who is responsible for review in each category.

Section 6: Transparency & Disclosure
Address when disclosure of AI use is required – for example, in client-facing documents, marketing materials, or HR decisions. Align with any applicable industry regulations.

Section 7: Training Requirements
Specify any training employees must complete before using approved AI tools in business processes.

Section 8: Policy Review Cycle
Given the pace of AI development, commit to reviewing and updating this policy at minimum annually. Assign responsibility to a named individual or role.

5. Week 4 Key Takeaways

✅ **Week 4 Key Takeaways**

- AI can improve each stage of the employee lifecycle – from faster recruiting to more effective onboarding and data-informed retention strategies – but AI hiring tools require active oversight to manage bias risk.
- AI can accelerate the drafting and maintenance of business policy documentation – but all legally consequential documents require professional review before use.
- Administrative AI tools – meeting transcription, email triage, and scheduling support – are among the fastest, highest-return applications available to small business leaders today.
- Every business deploying AI needs an AI Acceptable Use Policy – and the time to build it is before widespread adoption, not after a problem occurs.

6. Action Items — Complete Before Week 5

1. **Draft a one-page AI Acceptable Use Policy for your business** using the framework outline above and a generative AI tool. Treat the process as both an exercise and a deliverable: use it to identify your organization's specific concerns, boundaries, and approval needs.

2. **Try one administrative AI tool this week** – install Otter.ai for your next internal meeting, enable Copilot for Outlook if you are a Microsoft 365 user, or test another notes or meeting-summary tool you already have access to. Notice what it captures, what it misses, and whether the summary saves time or creates review work. For example, you might send notes from your phone to Copilot and ask it to organize the key points, action items, and follow-up questions.

3. **Review your current employee handbook** – or note that you do not have one. Ask ChatGPT or Claude: "What are the most common employee handbook gaps for a small business in Florida?" Compare the list to your current documentation and note any significant gaps.

7. Discussion Questions

Discussion Questions

1. How much of your current HR and administrative workload is consumed by tasks that are repetitive, process-driven, or documentation-intensive? What would you do with that capacity if it were available for strategic work?

2. Are you confident that your employees are currently using AI tools in ways that protect your business and your clients? If not, what specific risks concern you most?

3. What would your ideal AI Acceptable Use Policy actually prevent in your business – and what would it enable? Think about both the protective and the permissive dimensions of the policy.

Looking Ahead to Week 5:

Week 4 gives us the governance framework. Week 5 takes that further by examining the full spectrum of risks that come with AI adoption — from bias and hallucinations to cybersecurity threats and regulatory compliance. We move from "What should we allow?" to "What could go wrong, and how do we protect against it?"

The Tech Economy - Nick Liberoni

The growth of the American technology industry has had profound impacts on the global economy. With the help of American companies, our society has gradually moved on from office paper to PDFs and from pay phones to smartphones.

More recently, the proliferation of artificial intelligence has already had drastic impacts on our lives, even beyond the implications of AI media and summaries. Some businesses have already begun adopting AI into their workplace with the presumed benefit of improved worker productivity and cost cutting.

While the long-term effects of artificial intelligence are yet to be determined, many economists argue that artificial intelligence investment and spending has had an inflationary effect on the economy. Investment in the first half of 2026 has largely been driven by tech companies investing in new AI programs and financial firms investing in the entities developing these tools.

This movement of money around the economy and increased borrowing helps spur on inflation and makes the price levels of goods even higher. This means that even Americans who do not use AI are affected by the splurge of AI investment.

Additionally, those who are invested in stocks and ETFs may be far more exposed to AI and big tech than they understand. The S&P 500 is an index that comprises the 500 companies with the biggest market caps in the United States. Many people invest in this index due to its diversification and relative security.

Since the AI takeover, this index has boomed, much to the delight of its shareholders. Because this is a market-cap weighted index, however, the biggest companies make up more of the index. Because tech has been the hot industry to invest in, the S&P 500 has become dominated by stocks in tech. Nowadays, about 40% of the S&P 500 is devoted to tech. This is about double the weight tech had in 2020 and more than the 33% weight that tech had during the Dot Com Bubble.

This means that the S&P 500 may no longer be the diversified, safe investment that many investors assumed the ETF was. While S&P 500 investors see gains when the tech industry does well, if there is a tech selloff, these investors could suffer losses even without specific exposure.

Much has been made about the spending large companies make on AI. Many of these investments have been unprofitable so far. While many investors believe that the AI spending will pay off in the future, some look with skepticism as large tech companies' spending has not seen results.

Did You Know?

The scam economy never sleeps. Venice area homeowners, individuals, and businesses are frequent targets of scammers and fraudsters. Local law enforcement agencies regularly issue notices about scams that circulate through the area. Pay attention to those notices and share them with family, employees, and co-workers. Watch for common tactics used by phone and online scammers, home repair fraudsters, unlicensed contractors, and others.

If you are the victim of fraud or a scam, report it to local law enforcement. Even if the incident feels like a "lesson learned," your information may help prevent new victims, support broader enforcement, or even help with recovery.

The National Association of Bunco Investigators maintains a helpful resource on common scams: https://www.nabihq.org/cons-and-scams.html.