FREE TOOL

The AI in marketing governance checklist

A one-sitting way to see what AI is already doing in your marketing, decide how much oversight each tool needs, and make sure a person is responsible for what goes out. No committee required.

01 See what's already in use

Start with reality, not the wish list. List the AI tools touching your marketing, including the unofficial ones people found themselves. The riskiest tool is usually the one nobody approved.

TOOL	WHAT DATA GOES INTO IT	OWNER	OVERSIGHT LEVEL
e.g. Free chatbot for email drafts	Customer names, campaign copy	—	?

02 Match the oversight to the risk

Three levels are usually enough. Put each tool from the table above into one. Most will sit in level one.

LEVEL 1 · EVERYDAY

Simple rules, no meeting

Approved tools only. No customer or confidential data in anything unapproved. A person stays responsible. Say when AI was used. Covers most day-to-day use.

LEVEL 2 · STANDARD

Short review, days not weeks

Internal use, no decisions about individuals. A named reviewer, a quick form, a decision in days. Reuse the same review as a template next time.

LEVEL 3 · CLOSE

Proper scrutiny

Anything that profiles or targets people, prices individually, scores leads, or touches sensitive data. This is where the real time and expertise should go.

03 Three questions for any tool

Whatever the price of the tool, if these three have clear answers it can usually move quickly. If they don't, no amount of committee time will make it safe.

- [ ] **Data and lawful basis.** What data goes in, and do we have a lawful basis and clear consent for using it this way? Data collected for one purpose can't be quietly repurposed.
- [ ] **Responsibility.** Who owns what comes out, and do they have the time and the standing to say no?
- [ ] **Getting it wrong.** If it gets something wrong about a customer, how would we know, and how would they challenge it?

04 Protect the brand and the customer's trust

Compliance is the floor, not the ceiling. These keep AI on the right side of the line with your audience.

- [ ] **Voice written down.** Your brand voice exists in a form a model, or a new starter, can actually follow, not just a mood board.
- [ ] **A human who's looking.** Someone reviews customer-facing AI output with enough time and context to disagree, not just to skim and sign.
- [ ] **Disclosure.** You're clear about when content is AI-generated and when a customer is talking to a machine.
- [ ] **No creepy targeting.** Personalisation uses data people knowingly gave you, and you apply more caution, not less, with vulnerable audiences.
- [ ] **A record.** You keep a simple note of what the tool did and who approved it. If something goes wrong, that record is your defence.
- [ ] **Data protection in early.** Legal and data protection see AI tools at the start, not when the campaign is ready to launch.

05 What to do this week

01 **Pick your busiest channel** and list every AI tool touching it, including the unofficial ones.

02 **Sort them into the three levels.** You'll likely find most in level one, a few in level two, very few in level three.

03 **Run the three questions** over anything in level two or three. Fix the ones without clear answers first.

04 **Name an owner** for each tool, and agree what will trigger a review: a model update, a move to live, or a change in who uses it.

> **The point of all this:** blanket caution isn't governance, it's just delay with better vocabulary. Right-sized oversight is what lets the safe work move quickly while the risky work gets the attention it needs.

Want a hand applying this to your own team? If your governance is slowing the safe work without catching the risky stuff, that's the thing to fix. Start a conversation at deliverbetter.co.uk. First coffee's on David.

Part of the **AI in marketing** series by David Bain · Deliver Better