



BLUE HEN CONSULTING

The AI Starter Guide for Small Firms

A plain-language first step for professional firms, nonprofits, and local government using AI without an IT department.

Why this guide exists

Your staff are probably already using AI. You may not know which tools, or what they're typing into them. Meanwhile a vendor is pitching you something with "AI" in the name, a board member or partner is asking what your plan is, and the firms big enough to have answers have an IT department you don't.

This guide is the first step. It won't make you an expert. It will give you enough footing to use AI safely, spot the obvious risks, and know what to do next — in about ten minutes of reading. No jargon, no sales pitch.

First, the one thing that matters most

AI tools are useful and worth adopting. But the single biggest risk for a firm like yours isn't that AI is dangerous in the abstract — it's what your team puts into it. When you type something into a public AI tool, you may be sending it outside your control. For an office that holds privileged, personal, or confidential information, that's the whole ballgame.

NEVER PUT THIS INTO A PUBLIC AI TOOL

- Client names tied to their matters, conditions, or cases
- Protected health information (PHI), Social Security numbers, financial account details
- Privileged legal information or anything under a confidentiality obligation
- Donor records, constituent data, or anything you'd never email to a stranger

SAFE TO USE AI FOR

- Drafting and rewording general (non-confidential) documents and emails
- Summarizing public information or material you've stripped of identifying details
- Brainstorming, outlining, learning a topic, explaining a concept
- Routine internal text that contains no sensitive data

The five questions to ask about any AI tool

Before your firm adopts a tool — or keeps using one staff already picked up — get answers to these:

1 Where does my data go?

Does the tool send your inputs to an outside company? Is it stored? For how long?

2 Is my data used to train their AI?

Many free tools improve themselves on what you type. Paid business versions often let you turn this off. For sensitive work, this matters.

3 Is there a business or paid tier with privacy protections?

The free version and the business version of the same tool can have very different data rules. Usually the business tier is worth it for a firm.

4 Who at my firm is using it, and for what?

You can't manage what you can't see. A quick, honest inventory of what's already in use is often eye-opening.

5 What happens if it's wrong?

AI is confidently wrong sometimes. Where it touches client work, a human has to check it. Decide where that line is.

A 30-minute first step you can take today

- ✓ **Ask your team, without blame, what AI tools they already use.** You're gathering facts, not policing. People use these tools to do their jobs faster.
- ✓ **Write down what each tool touches.** Does it see client data? Internal-only material? Public information?
- ✓ **Flag anything where sensitive data meets a free public tool.** That's your first thing to fix.
- ✓ **Pick one safe, useful task to standardize on.** A small early win builds confidence faster than a big policy.
- ✓ **Decide who owns this.** Even a small firm needs one person who's the point of contact for "is this okay?"

What comes after the basics

Once you've done the above, the natural next steps are usually:

- **Train your team properly** — so everyone knows the safe ways to use AI in their actual role, not just the rules.
- **Write a short, plain-language AI use policy** — one page your office can actually follow.
- **Vet the tools you want to adopt** — and set them up with the right privacy settings from the start.

None of this requires an IT department. It requires someone who knows the material sitting down with you and your team.

That's where I come in

BH

I'm Tyson Saltwell, founder of Blue Hen Consulting. I help small firms, nonprofits, and local government across the Mid-Atlantic use AI safely and well — hands-on, local, and without enterprise-consulting overhead. Twenty-two years in consulting, including twelve in federal defense, plus Harvard AI training and an AI governance credential in progress.

The easiest first step is a free conversation about where your organization stands and what makes sense next.

[Book a free consultation](#)

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