Is your agency ready for AI?

Twenty quick checks. Tick what's true today. It takes five minutes, and it shows where to start and what to fix before anyone puts client data into an AI tool.

1. Data and confidentiality

- [ ] We know which AI tools staff are using today, including free ones on phones
- [ ] Approved tools are on business plans that don't train on our inputs
- [ ] We've written down what vendor, landlord and tenant data must never go into AI
- [ ] Our privacy notice and terms of business cover AI-assisted work
- [ ] Access is through work accounts we can switch off when someone leaves

2. Policy and supervision

- [ ] We have a written AI use policy (two pages is enough)
- [ ] A named person checks AI output before it reaches a client or a portal
- [ ] Property descriptions are checked for accuracy against the material information rules
- [ ] Our PI insurer and redress scheme position on AI use has been checked
- [ ] One named person owns AI in the agency

3. Where the time goes

- [ ] We know our top five repetitive jobs and roughly how long each takes
- [ ] Answering repeat portal enquiries is mapped as a process, not left to memory
- [ ] Templates exist for viewing feedback, renewals and compliance reminders
- [ ] Valuation and inspection notes follow a consistent format
- [ ] We've picked one job to automate first, with a time-saved target

4. Tools and team

- [ ] We've checked what our current software (CRM, portals, Microsoft or Google) can already do
- [ ] Property and tenancy documents live in one place, not scattered across inboxes
- [ ] Staff have had at least an hour's practical training
- [ ] We review what's working every quarter
- [ ] Nobody's buying AI tools before deciding which job they'll do

Your score

Count your ticks out of 20.