

AI Internal Analysis Worksheet Suite

This suite of worksheets is designed to help HR and senior leaders systematically surface, document, and assess AI use across their organization. Complete all worksheets in sequence for a full analysis.

Worksheet 1: Employee AI Use Survey

Instructions for Survey Administrator

Before distributing this survey, send a brief communication to all employees explaining that the purpose is to **understand how AI is being used so the organization can provide better guidance and support** — not to audit or discipline anyone. Frame it as a listening exercise. Aim for a completion window of no more than 5 business days. Keep the survey to 10 questions or fewer to maximize completion rates.

Suggested Introductory Message to Employees

Copy and customize this message for your organization's communication style.

"We are conducting a brief survey to better understand how AI tools are currently being used across the organization. The goal is simple: we want to make sure we're giving you the right guidance, resources, and support to use these tools effectively and confidently. This is not an audit. There are no wrong answers. Your honest responses will directly shape the guidance and training we provide. The survey takes approximately 5 minutes to complete."

Survey Questions

Question 1 — AI Tools Currently in Use

Which of the following AI tools do you currently use for work, even occasionally Select all that apply.

Tool	Select (✓)
ChatGPT (OpenAI)	
Microsoft Copilot	
Google Gemini	
Claude (Anthropic)	
Grammarly	
Notion AI	
Jasper	
Perplexity AI	
GitHub Copilot	
Adobe Firefly / Generative AI tools	
An AI tool built into software I already use (e.g., Salesforce, Workday, HubSpot)	
I do not currently use any AI tools for work	
Other (please specify below)	

Other tools not listed above:

Question 2 — Types of Tasks

What types of work tasks are you using AI tools for Select all that apply.

Task Type	Select (✓)
Drafting emails, memos, or internal communications	
Writing or editing reports or presentations	
Summarizing documents or meeting notes	
Analyzing data or building models	
Generating ideas or brainstorming	
Screening or reviewing resumes / candidates	

Researching topics or competitors	
Writing or reviewing contracts or legal documents	
Creating training materials or job aids	
Writing or reviewing performance-related content	
Customer or client communications	
Writing or debugging code	
Other (please specify below)	

Other tasks not listed above:

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Question 3 — Types of Data Being Entered Into AI Tools

This is the most important question on the survey. What types of information have you entered into an AI tool for work purposes Select all that apply.

Data Type	Select (✓)
Publicly available information (news, research, general facts)	
Internal business processes or general company information	
Internal financial data (budgets, forecasts, models)	
Client or customer names, data, or communications	
Employee names, performance data, or HR records	
Confidential contracts or legal documents	
Personally identifiable information (PII) about employees or customers	
Proprietary business strategies, product plans, or IP	
I am not sure what category the information falls into	
I have not entered any sensitive or confidential information	

Question 4 — Frequency of Use

How often do you currently use AI tools for work

Frequency	Select (✓)
Daily	
Several times per week	
Weekly	
Occasionally (a few times per month)	
Rarely (once a month or less)	
Never	

Question 5 — Guidance and Support

Do you feel you have received enough guidance from the organization about how to use AI tools responsibly and effectively

Response	Select (✓)
Yes, I feel well-guided and confident	
Somewhat — I have some guidance but still have unanswered questions	
No — I have been figuring it out on my own	
I haven't needed guidance because I don't use AI for work	

Question 6 — Open Guidance Questions

If you could get one question answered about using AI at work, what would it be

Question 7 — Barriers to Use

If you are not currently using AI tools for work, what is the primary reason Select all that apply.

Reason	Select (✓)
I am not sure which tools are approved or allowed	
I am not sure how to use them effectively	
I am concerned about data privacy or security	
I don't see a clear use case in my role	
I have tried them but don't find them useful	
I am waiting for official guidance or approval	
Not applicable — I do use AI tools for work	

Question 8 — Formal Approval

Have any of the AI tools you use for work been formally approved or recommended by your manager or the organization

Response	Select (✓)
Yes, all tools I use have been formally approved	
Some have been approved, but others I started using on my own	
None of the tools I use have been formally approved	
I don't know whether the tools I use are approved or not	
Not applicable — I do not use AI tools for work	

Question 9 — Department and Role

Please indicate your department and general role level. (This helps us identify where additional support or guidance is most needed.)

Department: _____

Role Level:

Level	Select (✓)
Individual Contributor	
Team Lead / Senior Specialist	
Manager	
Senior Manager / Director	

VP / SVP / C-Suite	
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Question 10 — Anything Else

Is there anything else you'd like us to know about how AI is being used in your team or department that isn't captured above

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Worksheet 2: Structured Employee Interview Guide

Overview

Select **8 to 12 employees** for one-on-one conversations following the survey. Choose participants who represent a range of functions, role levels, locations, and reported AI usage levels. Include both **high users** (to map active risk and real workflows) and **low or non-users** (to map fear, confusion, and access gaps).

Interviews should last **30 to 45 minutes**. Remind participants at the outset that the conversation is confidential, exploratory, and not disciplinary in any way.

Participant Tracking Log

#	Department	Role Level	Survey AI Use Level	Interview Date	Interviewer
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

Opening Script

Read or paraphrase to the participant at the start of each interview.

"Thank you for taking the time to speak with me today. As I mentioned, we're doing a listening exercise across the organization to understand how AI tools are being used in people's day-to-day work. There are no right or wrong answers. Nothing you share will be used to evaluate you or your team. We're trying to get an honest picture so we can build better support and guidance. I may take some notes, but I won't be attributing quotes to individuals in any reports we produce."

Interview Questions and Note-Taking Space

Opening Question — General Context

Q1: Before we get into AI specifically, can you give me a quick overview of your role and what your day-to-day work typically involves

Notes:

Core Questions — For High AI Users

Q2: What does a typical day or week look like when you use AI tools Walk me through it as concretely as you can.

Listen for: specific tools, specific tasks, how deeply embedded AI is in their workflow, whether it's occasional or habitual.

Notes:

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Q3: Can you walk me through the last time you used an AI tool at work What were you trying to accomplish, what did you put into the tool, and what did you do with the output

Listen for: data types entered, whether output was reviewed or used as-is, whether sensitive data was involved.

Notes:

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Q4: Are others on your team using AI in similar ways, or are you more of an early adopter in your group

Listen for: informal team norms, peer influence, whether usage is spreading, whether managers are aware.

Notes:

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Q5: Has anyone — a manager, IT, HR — ever asked you about your AI use or given you guidance on what's allowed or not allowed

Listen for: absence of oversight, informal approvals, any guidance that's been received and how clear or unclear it was.

Notes:

Core Questions — For Low or Non-Users

Q6: You mentioned in the survey that you use AI tools rarely or not at all for work. Can you tell me more about that What's held you back

Listen for: fear of doing something wrong, lack of awareness, no perceived use case, confusion about what's permitted.

Notes:

Q7: Do you know of others on your team or in your department who are using AI tools, even if you personally aren't

Listen for: social context, peer behavior, whether low personal use masks higher team-level use.

Notes:

Questions for All Participants

Q8: What questions do you have about using AI at work that you haven't been able to get clear answers to

Listen for: specific policy gaps, data privacy concerns, uncertainty about approved tools, questions about accuracy or accountability.

Notes:

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Q9: What would make you more confident using AI in your role — or more confident that it's being used responsibly across your team

Listen for: desired guidance formats, training preferences, approval process clarity, peer norms, leadership modeling.

Notes:

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Q10: Is there anything about how AI is being used in your area of the organization that you think leadership should know about

This is a catch-all. Some of the most important information often surfaces here.

Notes:

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Post-Interview Summary

Complete this section within 24 hours of each interview while details are fresh.

Summary Category	Key Findings from This Interview
AI tools identified	
Task types identified	
Data types mentioned (flag sensitive data in red)	
Formal approval status	
Guidance / training gaps surfaced	
Risk flags requiring follow-up	
Notable quotes or themes (paraphrased, not attributed)	

Worksheet 3: Cross-Functional Leadership Review

Overview

Convene the heads of each major department for a **structured 90-minute session**. This session will surface AI initiatives happening at the departmental leadership level that individual contributors may not know about — and vice versa. Both pictures are required for a complete organizational view.

This is not a brainstorming session or a strategy discussion. It is a structured inventory exercise. Assign a facilitator and a dedicated note-taker before the session begins.

Session Logistics

Item	Details
Date and Time	
Location / Platform	
Facilitator	
Note-Taker	
Departments Represented	
Departments Not Represented (and reason)	

Attendee Log

Name	Department	Title	Attended (✓)
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Suggested Session Agenda

Time Block	Activity
0:00 – 0:10	Framing and purpose — why we are doing this and how findings will be used

0:10 – 0:35	Discussion Question 1 — Current AI use across departments
0:35 – 0:60	Discussion Question 2 — Business problems being solved with AI
1:00 – 1:20	Discussion Question 3 — Risks and concerns already identified
1:20 – 1:30	Wrap-up: immediate flags, next steps, and follow-up commitments

Discussion Question 1: Current AI Use

Prompt to the group: "What AI tools is your team currently using — officially or unofficially Please be as specific as possible. We are not here to judge or penalize anything that's already happening. We need an accurate picture."

Go around the room department by department. Record responses in the table below.

Department	AI Tools Currently in Use	Officially Approved (Y/N/Unclear)	Est. Number of Users
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Discussion Question 2: Business Problems Being Solved

Prompt to the group: "What business problems are you currently trying to solve with AI in your department What outcomes are you hoping for, or have already seen"

This question surfaces intent and value — important for building policies that enable rather than only restrict.

Department	Business Problem / Use Case	Current Status (Active / Planned / Exploratory)	Measurable Outcome Identified (Y/N)
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Discussion Question 3: Risks and Concerns Already Identified

Prompt to the group: "What risks or concerns have already come up in your department around AI use — whether or not they've been formally escalated"

This surfaces known-but-unaddressed issues. Listen carefully. These are often the most urgent findings.

Department	Risk or Concern Described	Has It Been Escalated (Y/N)	Immediate Action Needed (Y/N)
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Session Wrap-Up Notes

Immediate flags requiring action before the full Internal Analysis is complete:

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Key themes or patterns observed across departments:

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Departments or use cases requiring follow-up conversations:

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Worksheet 4: AI Use Case Inventory

Overview

This inventory is the **primary output** of the Internal Analysis. It consolidates findings from the employee survey, structured interviews, and leadership review into a single, organized picture of AI use across the organization. Complete one row per identified use case.

Use the **Risk Level Key** below when assigning risk ratings.

Risk Level Key

Risk Level	Definition
LOW	No sensitive, confidential, or personal data involved. Use case has minimal business impact if output is wrong. Tool use is incidental or supplemental.
MEDIUM	Some internal business data involved, or use case influences moderate-stakes decisions. Tool may not have been vetted but risk is containable.
HIGH	Sensitive employee, client, or financial data is being processed. AI is being used in high-stakes decisions (hiring, performance, legal, financial). Tool has not been vetted or approved.
CRITICAL	PII, confidential data, or protected information is being entered into an unapproved external tool with data retention policies that expose the organization to legal, regulatory, or reputational risk. Requires immediate intervention.

AI Use Case Inventory Table

#	AI Tool Being Used	Department(s)	Role(s) Using It	Task / Use Case Description	Type of Data Being Processed	Formally Approved (Y/N/Unknown)	Risk Level (Low / Medium / High / Critical)	Source (Survey / Interview / Leadership Review)
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Inventory Summary Counts

Metric	Count
Total use cases identified	
Use cases rated LOW risk	
Use cases rated MEDIUM risk	

Use cases rated HIGH risk	
Use cases rated CRITICAL risk	
Use cases with formal approval	
Use cases with NO formal approval	
Use cases involving PII or employee data	
Use cases involving client or customer data	
Use cases involving confidential financial data	
Departments with identified AI use	
Departments with no identified AI use	

Worksheet 5: Action Plan and Next Steps

Overview

The inventory is only valuable if it drives action. This worksheet organizes identified use cases into three response tracks and assigns ownership, timelines, and follow-up accountability for each.

Track 1: Immediate Intervention Required

Use cases rated HIGH or CRITICAL risk. These require direct, immediate action: a conversation with the team involved, a temporary pause on the use case if warranted, and a clear communication about what must change and why. Do not wait for policy to be finalized before addressing these.

Use Case # (from Inventory)	Brief Description	Specific Risk Being Addressed	Immediate Action to Take	Owner	Due Date	Status
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Track 2: Formal Review and Governance Needed

Use cases rated MEDIUM risk, or use cases that are unapproved but not immediately dangerous. These need to be formally reviewed, vetted, and either approved with guardrails or redirected. Include them in your governance workplan.

Use Case # (from Inventory)	Brief Description	Review Needed (Tool vetting / Policy / Training / All)	Owner of Review	Target Resolution Date	Status
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Track 3: Formalize and Communicate Approval

Use cases rated LOW risk that simply need to be acknowledged and formally cleared so employees can use them confidently. These do not need heavy oversight — they need a clear signal that they are approved.

Use Case # (from Inventory)	Brief Description	Communication Needed (Team / Department / Org-Wide)	Owner	Target Communication Date	Status
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AI Internal Analysis: Leadership Presentation Summary

Use this section to prepare findings for your leadership team. Present the findings accurately and completely. Do not soften what you have found. The gap between what leadership believed was happening and what is actually happening is itself the most powerful argument for prioritizing AI governance as an urgent organizational matter.

Presentation Section	Your Summary Notes
What we believed was happening before the AI Internal Analysis	
What the Internal Analysis actually found	
The most significant risk exposures identified	
The most significant opportunity areas identified	
The size of the gap between assumption and reality	
Recommended immediate actions (Track 1)	
Recommended governance priorities (Track 2)	
Training and communication gaps to address	
Proposed timeline for next steps	

Analysis Completion Checklist

Step	Complete (✓)	Date Completed	Owner
Employee survey distributed with correct framing message			
Employee survey closed with sufficient completion rate (target: 70%+)			
Survey data analyzed and summarized			
8–12 interview participants selected across functions and levels			
All structured interviews completed and post-interview			

summaries written			
Cross-functional leadership review session held			
Leadership session notes documented and distributed to attendees			
AI Use Case Inventory completed with all sources consolidated			
All use cases assigned a risk level			
Track 1 (immediate intervention) items identified and owners assigned			
Track 2 (formal review) items logged in governance workplan			
Track 3 (formalize and communicate) items scheduled			
Leadership presentation prepared with unfiltered findings			
Leadership presentation delivered			
AI Internal Analysis findings documented as foundation for AI policy development			

These worksheets are designed to be used together as a complete Analysis system. The output of this process — the AI Use Case Inventory and Action Plan — becomes the documented foundation for all subsequent AI governance work, including policy development, training design, and tool approval processes. Do not begin policy writing until this analysis is complete.