

Fernhill Wholesale
Oct 16, 2026

AI decisions

Leadership report • Decisions, conditions and current uses

Decisions and conditions

Tool / request	Recorded decision	Reviewer
Weekly stock summary assistant	Approved with conditions Internal summaries only; the operations manager checks the totals against the stock system before the summary is shared.	Operations director
Product description writer	Approved Catalog descriptions only. A person checks sizes, materials and prices before each listing goes live.	Operations director
Voice-note transcriber (personal account)	Declined Declined. Calls are not recorded with AI until the people on the call agree and a retention period is set. Delete existing recordings on the personal account.	Operations director

Showing up to three most recently entered decisions of 3. 3 of 5 uses marked approved in the inventory have no decision record yet. Next action: record the reviewer, decision and conditions for each in Approvals. Entry order is not approval date. Read full conditions in the working record before acting.

AI uses in scope

Tool / information boundary	Owner	Approval
Weekly stock summary assistant Product codes, stock counts and supplier delivery dates; no customer names, contact details or...	Operations manager	Approved with conditions
Customer email reply drafts Order numbers and delivery status; customer names and contact details removed before drafting.	Customer service lead	Approved with conditions
Catalog photo cleanup Fernhill’s own product photos only; no people, customer premises or supplier logos.	Sales and marketing lead	Approved with conditions
Product description writer Published supplier specifications only; a person checks sizes, materials and prices before a...	Sales and marketing lead	Approved
Supplier quote comparison Supplier quotes with supplier names replaced by codes; no customer information.	Purchasing lead	Approved with conditions
Voice-note transcriber (personal account) Customer and supplier calls, names, voices and price discussions.	Sales representative	Declined

6 uses recorded. Full inventory and decision history remain in the dashboard and full-record export.

Working scope

Operations, sales and warehouse, an 18-person wholesaler • Put the AI tools staff already use on record, decide what each may touch, and give the owners a short leadership report by October 15, 2026.

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Follow-up and ownership

Leadership report • Open work and accountable owners

Priorities for leadership

Action / risk	Owner	Due
The weekly summary shows wrong totals and a reorder is missed or doubled. Compare one summary a month with the stock system and record any differences.	Operations manager	Oct 8, 2026
Staff paste customer names or payment details into an unapproved AI tool. Ask each team which tools they use, publish the approved list and brief all 18 staff.	Office manager	Oct 15, 2026
Call recordings made on a personal account before the request was declined have not been... Confirm what was recorded, delete the copies with the sales representative and record the deletion.	Sales manager	Oct 22, 2026

Showing 3 of 3 open risks, ordered by recorded impact and due date. Full details remain in the working record.

Accountability and next review

Policy owner: Operations director. Next review: Dec 15, 2026.
Policy adoption recorded Oct 8, 2026.

Supporting program

2 of 12 readiness items have a recorded owner, evidence reference and In place status. This optional program view is separate from the decisions above.
Prepared by Fictional example • Operations manager. Recorded decisions and excerpted notes, not independent assurance or certification. Use the full record for complete wording, supporting reviews and evidence references.