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Independent family business - Established 1991

Members of Guild of Property Professionals

Licensed Agents with Rent Smart Wales



AI usage Policy for Trevor George Morgan T/A Morgan & Co

1. Purpose

This policy outlines the responsible use of Artificial Intelligence (AI) technologies by Morgan & Co, to help ensure usage aligns with UK laws, ethical standards, and business values. It applies to all employees, contractors, and third parties acting for or on behalf of the business.

2. Scope

This policy covers all uses of AI within the business, including but not limited to:

- Market appraisals
- Marketing & Communications
- Lead generation and analysis
- Document drafting
- Internal operations

3. Guiding Principles

All AI usage must align with the following principles:

- **Transparency:** Clearly inform consumers when AI tools are being used
- **Accountability:** Review all AI produced material prior to any publishing or use to check accuracy
- **Privacy and Data Protection:** All AI use must comply with the UK GDPR and Data Protection Act 2018, our own DPA Policy and in line with our privacy notice
- **Non-discrimination:** AI must not be used in ways that result in bias, discrimination, or unfair treatment of individuals or groups.
- **Security:** AI tools must be procured, deployed, and monitored with appropriate cybersecurity measures in place.
- **Digital Markets, Competition and Consumers Act 2024:** Review all AI produced material to ensure it creates no breach of DMCC Act 2024

4. Approved Use Cases

Employees may use AI tools for:

- Drafting marketing copy, property descriptions, and emails
- Responding to customer queries through AI-assisted chat
- Generating standard documentation (with review by staff)
- Analysing market trends and internal business performance

5. Prohibited Uses

The following uses are strictly prohibited:

- Sole reliance on AI for legal or financial decisions
- Using AI to impersonate employees or clients

- Generating misleading or false property information
- Processing customer data with AI without proper legal basis

6. Employee Responsibilities

- Employees must only use AI tools approved by the company
- All outputs from AI must be reviewed for accuracy and appropriateness
- Suspected misuse or bias must be reported immediately to management

7. Customer Transparency

When AI is used in customer-facing contexts, we will:

- Inform customers when they are interacting with an AI system
- Provide a clear path to escalate to a human agent
- Honour customer requests not to be subject to AI-based profiling or automation where applicable

8. Monitoring and Review

This policy will be reviewed annually or when significant changes in AI technology or regulation occur. Compliance will be monitored regularly through internal audits and feedback mechanisms.

9. Breaches

Any breach of this policy must be reported immediately to your line manager so that the matter may be investigated. All breaches will be recorded in Company documentation. Breaches may result in disciplinary action being taken in accordance with our HR Policy also may be reported to the Information Commissioner's Office (ICO) or relevant authorities.

REVIEW DATE:

SIGNATURE: