

Before using AI for any client-facing or professional task, run through these five questions. Print this out, pin it by your monitor, and make it a habit.

1 Will this AI output materially impact my service delivery?

IF YES:

You must record your determination, the AI tool used, and your reasoning in writing. Proceed to Question 2.

IF NO:

Standard good practice still applies, but the RICS AI standard requirements are not triggered. Use AI responsibly.

"Material impact" means the AI output is capable of influencing the delivery of your surveying service.

2 Am I comfortable with where this data is going?

IF YES:

Confirm the AI provider's data handling meets your firm's requirements. Check for client confidentiality risks.

IF NO:

Stop. Do not input client data, sensitive project information, or personal data into the tool until data governance is resolved.

Check: Is data stored? Where? Who can access it? Is it used to train the model? Review your firm's data handling policy.

3 Can I verify the output with my professional judgement?

IF YES:

Proceed, but review every output critically. You remain accountable for accuracy and completeness.

IF NO:

Do not rely on the output. If you lack the expertise to evaluate it, the AI should not be used for that task.

AI can hallucinate, miss context, or produce plausible-sounding errors. Your professional skill is the quality check.

4 Does my firm's AI policy permit this use?

IF YES:

Proceed within the boundaries set by your firm's Responsible AI Use Policy.

IF NO:

Stop. Raise it with your AI governance lead or management. Do not use unapproved tools for client work.

If your firm doesn't have an AI policy yet, that's a governance gap that needs addressing. See CAIG Educate.

5 Does the client need to be informed?

IF YES:

Disclose AI use to the client in line with your firm's transparency approach (engagement letter, email, or report note).

IF NO:

If the AI use was not material to service delivery, disclosure may not be required — but transparency builds trust.

When in doubt, disclose. Clients value honesty about how their work is being delivered.