If someone has sent you this: they're considering something new, and they'd like to decide with you what happens to customers' information before there are any customers. Tick what you've done, and talk about the rest.

Customer data and AI, decided before the first customer

Tick it on your own, or each of you separately and then compare.

What customers would give you

- [ ] **You've listed what customers would trust you with.**
  Names, messages, files, payment details and anything else they'd send.
- [ ] **You've marked the most sensitive item.**
  It's usually the one that decides the rest.
- [ ] **You've traced where each item would go.**
  Every tool and service it would pass through, AI tools included.

What you've decided

- [ ] **You've decided which information may go into AI tools.**
  Including the decision to keep all of it out.
- [ ] **You've checked what each AI tool does with what goes in.**
  Whether it's kept, and whether it's used for anything else, from the tool's own terms.
- [ ] **You've decided who can change that decision.**
  One named person, so it isn't changed by whoever sets up the next tool.

What customers are told

- [ ] **You've written what customers would read about their data and AI.**
  Two or three plain sentences.
- [ ] **You know what you'd do if a customer asked for their data to be deleted.**
  Including from any AI tool it went into.
- [ ] **You know who you'd ask about data protection law.**
  Someone qualified, before the first customer.
- [ ] **There's a date to read the decision again.**
  After the first ten customers is usually soon enough.

Why these points are important

Before there are customers, deciding what happens to their information takes an afternoon. Afterwards it means changing systems that are already in use, and telling people who trusted you with something.

What customers usually give without thinking

- Email threads with names and details of other people.
- Files with figures in them.
- Notes from calls.
- Complaints, which often say more than the customer intended.
- Payment details.

Each of these can end up in an AI tool through an ordinary piece of work, such as a summary or a reply.

Why the first tool tends to decide

Whatever tool is set up first tends to set the practice, because it's already holding the information when anyone thinks to ask. Deciding before it's set up means the tool follows the decision.

What I'd do first

I'd write down the most sensitive thing a customer would give you and follow it, step by step, through everywhere it would go. In my experience that one trace answers most of the other questions.

When you're the one it's been sent to

If you'd be setting up the systems, it helps to say where the information would actually go, including anything automatic. The person sending this may not know.



WHERE COACHING FITS

People at this point often use coaching to decide what they want to promise customers, and how much of that they're prepared to keep to when it costs time. I won't tell you what to decide, and I'm not a lawyer. I'll ask the questions that show what you'd want a customer to be able to rely on.

What to look for in any coach
simonbowen.com/guides/choosing-a-coach

A free first conversation
simonbowen.com/enquire/?moment=start