If someone has sent you this: they'd like to agree with you which information may go into AI tools at work, and which may not. Tick what you've done, and talk about the rest.

What may go into AI tools, and what may not

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

What's happening now

- [ ] **You've listed the AI tools used for work.**
  Including ones on personal accounts and ones built into other software.
- [ ] **You've noted what kind of information goes into each.**
  Client names, figures, emails, files.
- [ ] **This was asked without blame.**
  People only say what they actually do if it's safe to.

What's agreed

- [ ] **There's a short list of what may go in.**
  With one real example.
- [ ] **There's a short list of what may not.**
  With one real example, such as a client's contract or someone's health details.
- [ ] **You've agreed what to do in a grey case.**
  Usually: ask one named person first.
- [ ] **If you're inside a larger organisation, its rules are included.**
  The business's list can be stricter, never looser.

Keeping it working

- [ ] **Every tool's account belongs to the business.**
  So information doesn't sit in a personal account when someone leaves.
- [ ] **You know what you'd tell a client who asked.**
  Two or three plain sentences.
- [ ] **There's a date to look at it again.**
  Tools change their terms often, so twice a year is reasonable.

Why these points are important

In most businesses I've seen, information goes into AI tools long before anyone decides whether it should, because the tools are useful and nobody said otherwise. So the first thing worth finding out is where it's going in.

What usually goes in without a decision

- Client emails pasted in for a reply.
- Spreadsheets with names and figures.
- Meeting notes and call recordings.
- Contracts, for a summary.
- CVs, during hiring.

Each is an ordinary piece of work, and each is information a client or a person trusted the business with.

Why personal accounts matter

A tool on someone's personal account is outside anything the business has agreed. When they leave, the information can stay with them.

What I'd do first

I'd ask everyone, without blame, which tools they use and what they put in. The answers are usually more useful than any rule written before them.

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

It helps to say honestly what you use now, including anything you're unsure about. A rule built on what people actually do tends to be one they keep.



WHERE COACHING FITS

People at this point often use coaching to decide what they want the business to promise clients, and how to raise it with the team without it sounding like an accusation. I won't tell you what your rule should be, and I'm not a lawyer. I'll ask the questions that show what you'd want a client 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=scaling