

Your One-Page AI Data Policy

Fill this in today. Four categories, one decision each, one owner each.

The rule

If you would not post it publicly, do not paste it in without knowing where it goes.

That is the whole policy. Everything below is you deciding what "where it goes" means for four kinds of information in your business.

Before you fill this in

Know two things about the tools your team uses.

- **Consumer plan or business plan?** Consumer and free plans may use what you type to improve the product. Business and enterprise plans generally do not.
- **Where is the setting?** Every major tool has a data control in settings. Find it once, write down where it is, and tell your team.

► PROMPT TO CHECK A TOOL

I use [tool name] on the [plan name] plan. In plain language, tell me:

1. Does anything I type get used to train the model?
2. Exactly where in settings do I turn that off?
3. What does that setting NOT cover?

Run this on every tool your team touches, then verify the answer in the vendor's own settings page.

Give yourself twenty minutes. If you spend more than that, you are overthinking it. If you skip it, every person on your team makes this call by themselves, every day.

The four categories

For each one, pick a decision and name a person. Not a department. A person.

1 Client and customer information

Names, addresses, phone numbers, email, account numbers, anything that identifies a specific customer.

Our decision

- ☐ Never goes into any AI tool
 - ☐ Only into approved business-plan tools, listed below
 - ☐ Only after removing names and identifying details
 - ☐ Other:
-

Approved tools for this category

Who owns this decision

Where people go with questions

2 Financial information

Bank details, payroll, tax records, margin data, pricing you do not publish, anything your accountant touches.

Our decision

- ☐ Never goes into any AI tool
 - ☐ Only into approved business-plan tools, listed below
 - ☐ Summary figures only, no account numbers
 - ☐ Other:
-

Approved tools for this category

Who owns this decision

Where people go with questions

3 Employee records

Applications, reviews, disciplinary notes, compensation, health or leave information, anything in a personnel file.

Our decision

- ☐ Never goes into any AI tool
 - ☐ Only into approved business-plan tools, listed below
 - ☐ Only with the employee's knowledge
 - ☐ Other:
-

Approved tools for this category

Who owns this decision

Where people go with questions

4 Anything under a contract or NDA

Client work covered by a confidentiality clause, vendor terms, partner agreements, anything where someone else's contract governs what you can share.

Our decision

- ☐ Never goes into any AI tool
 - ☐ Only after checking the specific agreement
 - ☐ Only into approved business-plan tools, listed below
 - ☐ Other:
-

Approved tools for this category

Who owns this decision

Where people go with questions

What is always fine

Worth writing down so the policy does not read as one long no.

- Public marketing copy and anything already on your website
 - Made-up practice examples
 - General questions with no company information attached
 - Your own drafts, before customer details go in
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Sign and date it

A policy nobody signed is a suggestion.

Written by

Date

Reviewed with the team on

Next review date

DO THIS BEFORE YOU FILE IT

Put the next review date on the calendar now, six months out.

This is a practical working document, not legal advice. If you operate under HIPAA, FINRA, or a similar regulator, have your compliance advisor read it before you circulate it.