

Your Team's One-Page AI Data Policy

Four categories, one decision each, one named owner each. Fill it in this week.

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

Decide what “where it goes” means for four kinds of information, department by department. Page 2 shows how.

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
- ☐ Only after removing names and identifying details
- ☐ Other:

Owner (a person, not a department)

Approved tools for this category

Where departments differ

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Bank details, payroll, tax records, margin data, pricing you do not publish, anything your accountant touches.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
- ☐ Summary figures only, no account numbers
- ☐ Other:

Owner (a person, not a department)

Approved tools for this category

Where departments differ

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
- ☐ Only with the employee's knowledge
- ☐ Other:

Owner (a person, not a department)

Approved tools for this category

Where departments differ

4 Anything under a contract or NDA

Confidentiality clauses, vendor terms, partner agreements, anything where someone else's contract decides.

Our decision

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

Owner (a person, not a department)

Approved tools for this category

Where departments differ

5 Not sure? Ask:

Name, and how to reach them

Sign and date it. A policy nobody signed is a suggestion.

Written by

Date

Reviewed with the team on

Next review date

How to fill this in

Give yourself twenty minutes. Do it with the two or three department managers who handle the most information.

Before you start, learn three things about each tool 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.
- **Work account or personal account?** People sign in with whatever account is open in the browser. With Gemini and Gemini Notebook that is often a personal Gmail. Tell your team which one to use for company documents.
- **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 on the vendor's own settings page.

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

Why each category has a department line

At this size the answer is rarely the same for every department. The owner column is one person who answers questions on that category. The department line is where the answer changes.

EXAMPLE OF A DEPARTMENT ANSWER

Sales can use client names but not contract terms.

Accounting can use vendor invoices but not payroll.

If a department is not listed, the decision you checked for the whole category applies.

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

Do this before you file it

Put the next review date on the calendar now, six months out, and go over the policy with your team on the day you sign it.

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.