

Internal AI Usage Policy

Purpose

This policy defines how AI tools may be used safely within the organisation to protect client data, intellectual property, and legal obligations.

Core Principle

AI tools are treated as external processors. Do not input information that would be unsafe to share with an external third party.

Approved Uses

- Drafting generic emails and content using placeholders
- Creating frameworks, templates, and training materials
- Summarising publicly available information
- Role-play and skills practice scenarios

Prohibited Uses

- Client or prospect contact details
- Contracts, pricing schedules, or proposals
- CRM exports or customer data
- Financial, legal, or HR records
- Passwords, API keys, or system access details

Data Handling Rules

- Always anonymise or abstract examples
- Never paste full internal documents
- Use placeholders instead of real data

AI Memory

AI memory may only store user preferences and non-sensitive workflow context. No customer, pricing, or deal data is permitted.

Compliance

Breaches of this policy may result in disciplinary action and must be reported immediately.