

## AI Safety Checklist for Sales

Before using AI, confirm the following:

- No real customer or prospect contact details included
- No pricing, margins, or deal values included
- No contracts, proposals, or SOW (Statement of Work) pasted
- No CRM screenshots or exports used
- No internal forecasts or pipeline data included
- No passwords, links, or system details shared
- Examples are anonymised or hypothetical
- Content would be safe to email externally

**If unsure, do NOT use AI and escalate to your manager.**