

PIN THIS UP · AI AT WORK

Use the tools. Don't feed them what isn't yours to share.

AI tools are approved and encouraged here — on the firm's accounts, within these rules. When in doubt, ask; nobody has ever been in trouble for asking.

DO

- + Use the **approved tools on company accounts** — not personal logins — for anything work-related.
- + **Review everything before it leaves your name.** You are accountable for what you send, not the tool.
- + Report near-misses. "I nearly pasted the client list" gets a thank-you, every time.
- + Ask for new tools to be added to the approved list — the list exists so we can say yes.

DON'T

- × Paste **customer or staff personal data** into any AI tool.
- × Paste **passwords, keys, financials, contracts**, or anything under NDA.
- × Let AI notetakers into meetings without telling the people in them.
- × Trust an email *because* it is well written. Polish no longer proves a human — or honesty.
- × Connect AI apps, plugins or agents to your work account without approval.

THE THREE BINS — THE ONLY RULE YOU MUST MEMORISE

GREEN	Public stuff, blank templates, general questions → any approved tool, freely.
AMBER	Internal but not sensitive — drafts, process notes → approved business-tier tools only.
RED	Personal data, money, contracts, secrets → not into AI. At all. Ask first.

BEFORE YOU PASTE — THREE QUESTIONS

- Would I email this to a stranger? If not, which bin is it in?
- Is there a name, an account number, or a price in here that isn't public?
- Am I on the company account, or my own?

MONEY MOVES — THE ONE HARD RULE

Any new payee, changed bank details, or urgent payment request — however it arrives, **whoever it sounds like** — gets verified by a call to a number we already had on file. AI can fake a voice on a video call. It cannot fake the number in our records. No exceptions, including the boss. *Especially* the boss.

If something went wrong — or nearly did: stop, don't tidy up, tell [named person] the same day. Expect a thank-you — fast reporting is what saves us; silence is the only thing that can sink us.

Approved tools list & full policy: [location — intranet / shared drive] · Questions: [named person]
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