

Keeping customer details safe

Know what never goes into an AI chat, how to get the same help without it, and where your tool's privacy settings are.

Try it

- 1 **Spot the problem.** Don't type this one. Just read it and pick out what shouldn't go into AI:

Write a reminder to Jane Smith, 14 Oak Road, S11 8AB. Her card ending 4421 was declined on Tuesday.

- 2 **Ask the safe way.**

Write a polite reminder to a customer whose payment didn't go through, asking them to get in touch.

Add the name yourself, in your own email.

- 3 **Find your settings.** Open your AI tool's settings and look for **Privacy** or **Data controls**. Find whether your chats are used to train or improve the AI, and decide if you want that switched off. The names change between apps and updates, so ask for help if you can't see it.
- 4 **Tidy up.** Find your list of past chats, and delete one you no longer need.

Never type these into AI

- Card or bank details
- Passwords and codes
- A customer's name together with their address or phone number
- Health details
- Staff records
- Anything told to you in confidence

Under UK GDPR, you're responsible for the customer details you hold, even when a tool handles them. The ICO's small business help is at ico.org.uk. This session covers the basics; it isn't legal advice.

TAKE-HOME RULE

If you wouldn't pin it on the noticeboard, don't paste it into AI.