AI Privacy Checklist for Business

Cutting Through the Chaos | Timeless principles, modern tools

COVE CONSULTING

Never paste these into an AI tool

- ☐ Customer names with contact details, or anything a customer told you in confidence
- ☐ Credit card, banking or SIN numbers
- ☐ Passwords and login codes
- ☐ Staff records, pay or performance notes
- ☐ Contracts or financials with real names still in them

Tip: swap real names for placeholders, like “Customer A” or “[business name].”

Turn off training on your chats

- ☐ Open each AI tool's Settings and look for Privacy or Data controls.
- ☐ Turn off the switch that lets your chats be used to train or improve the model.
- ☐ Use a temporary or incognito chat for anything sensitive.

Menu names change often, so check your own account.

Check what your AI remembers

- ☐ Many AI tools remember details from past chats. Look for Memory or Personalization in Settings.
- ☐ You can view, edit or delete what it remembers, or turn memory off.
- ☐ Don't share anything you wouldn't want remembered.

Before you connect email, calendar or messages

- ☐ Start without connecting anything. Try simple tasks first.
- ☐ Connect only what you need, one account at a time.
- ☐ Read the permission screen before you click Allow.
- ☐ You can disconnect any time, in the AI tool and in your Google or Microsoft account security settings.

Questions? Book a free 20-minute chat.

coveconsulting.ca | maureen@coveconsulting.ca | (902) 388-1800

Customer information and the rules

- ☐ Canada's private-sector privacy law (PIPEDA) covers customer information you collect in business. If you put it into an AI tool, you're still responsible for it.
- ☐ Only use customer information for the reason you collected it.
- ☐ CASL: don't email people without their permission, even if AI found the address.

Be upfront about AI

- ☐ Drafting with AI is like using a spell-checker. No label needed.
- ☐ If an image or video was made or changed by AI, say so in the caption.
- ☐ Facebook and Instagram may add an “AI info” label to images they detect.

If you'd rather opt out of Meta AI training

- ☐ Go to the Meta Privacy Center, then Privacy topics, then AI at Meta.
- ☐ Choose “Information that you've shared on Meta products” and fill in the form.
- ☐ One request covers Facebook and Instagram. Outside Europe and the UK, Meta reviews each request and doesn't guarantee it.

Set a simple team rule

- ☐ Which AI tools are okay to use: _____
- ☐ What never goes in: _____
- ☐ Who checks before anything is posted or sent: _____

Check every answer

- ☐ AI can sound sure and still be wrong. Check facts, prices, dates and names before anything goes out.

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