

Protect Confidential Information: Never input sensitive company data, financial details, or proprietary processes into AI tools. This includes customer information, pricing structures, and strategic plans.

Verify AI Outputs: Always fact-check AI-generated content, especially for policies, procedures, or compliance-related materials. AI can make confident-sounding errors that can create risks.

Maintain Human Oversight: Use AI as a productivity tool, not a decision-maker. Final approval on all processes, Key Performance Indicators (KPIs), and operational changes should come from company leadership.

Data Security Best Practices



Use Generic Examples:

When seeking help with processes or KPIs, describe roles and functions without using specific names or company metrics. Frame requests as "a roofing company with a dealer network" rather than identifying the precise company and dealers.



Avoid Real Customer Data:

Never input actual customer information or transaction details. Use placeholder data for analysis or process development.



Screen Capture Awareness:

Be cautious about sharing screenshots that might contain sensitive information in headers, sidebars, or background elements. AI sees everything.

Operational Applications

Process Documentation: AI excels at helping structure policies and procedures but always customize outputs to match your company values and specific operational needs.

KPI Development: Use AI to brainstorm measurement frameworks, but ensure final metrics align with your company goals and objectives.

Communication Templates: AI can draft email templates or process communications, but review for tone alignment with your company's culture.

Red Flags to Avoid

Inputting actual financial data or performance metrics

Sharing customer contact information or details

Uploading internal documents or spreadsheets

Asking for legal advice without professional consultation

Relying solely on AI for compliance-related decisions

Best Practices

Use AI to enhance your systematic thinking while maintaining control and verification standards of all AI product. **Always** apply your strategic lens to AI suggestions before implementation.

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