AI POWER HOUR · CHECKLIST

# AI settings checklist

Fifteen minutes, once a quarter. Go through every AI tool your team uses and give each one a colour.

## 1. List every AI tool, including the ones you forget

### The obvious ones

- Chat assistants: ChatGPT, Claude, Gemini, Copilot
- Coding and prototyping tools: Lovable, Cursor, GitHub Copilot, Vercel
- Meeting note-takers and dictation tools

### The ones nobody thinks of as AI

- AI built into tools you already pay for: your CRM, email, chat, docs and design tools
- Browser extensions that read what you type
- Apps connected to your AI tools (email, calendar, drive)

## 2. Is it really a business plan? All three must be yes

| QUESTION | WHAT A "YES" LOOKS LIKE |
|---|---|
| **1. Does the company pay?** | A company card or invoice, not you on a personal card |
| **2. Is there an admin?** | Someone can add and remove people and set rules for everyone |
| **3. Is there a data agreement (DPA)?** | Your company can sign one covering personal data |

Any "no" means it's a personal plan, whatever it costs or whatever it's called. Claude Pro and Max, and ChatGPT Plus and Pro, are personal plans.

## 3. Check each tool

- [ ] Which plan is it on, and who pays for it?
- [ ] Is the training setting on or off? (Where to find it is below.)
- [ ] What's connected to it? Keep only what the job needs, read-only where you can.
- [ ] Any public share links? Turn them off.
- [ ] Is memory on? Decide what it should remember.
- [ ] What goes in: public, internal, customer or regulated data?
- [ ] Who on the team uses it, and on whose account?

## 4. Where to find the training setting

| TOOL | WHERE TO LOOK (CHECKED OCTOBER 20, 2026) |
|---|---|
| **ChatGPT** (personal) | Settings › Data controls › turn off "Improve the model for everyone" |
| **Claude** (Free, Pro, Max) | Settings › Privacy › turn off "Help improve Claude" |
| **Gemini** (personal Google account) | gemini.google.com › Activity › turn off Gemini Apps Activity (also called Keep Activity) |
| **Microsoft Copilot** (personal) | Profile › Privacy › turn off "Training on conversation activity" and "Training on voice conversations" |

| | |
|---|---|
| **Granola** (Basic, Business) | Settings › Preferences › turn off “Use my data to improve models for everyone” |
| **HubSpot** | Settings › Account management › AI › Access › “AI Model Training” (on by default, super admins only) |

Menus change often. If it isn’t there, search the tool’s help centre for “model training.” Turning training off stops future use only; it doesn’t pull back data already used.

## 5. Give each tool a colour

| | |
|---|---|
| Green | Business plan, and you know the settings |
| Yellow | Personal plan, training off, nothing sensitive goes in |
| Red | You don’t know, or customer data is going into a personal plan |

## 6. What can go where

| DATA | EXAMPLES | WHERE IT CAN GO |
|---|---|---|
| **Public** | Website copy, published docs, open-source code | Any tool, any plan |
| **Internal** | Roadmaps, strategy, financials, your own code | A business plan that doesn’t train on your data |
| **Customer** | Names, emails, usage data, tickets, contracts | A business plan with a signed DPA, or strip names first |
| **Regulated** | Health records, payment cards, government IDs | Only where a specific agreement covers it, like a BAA for health data. Otherwise, no. |

**The one line to remember:** the toggle protects your ideas. The plan protects your customers.