AI POWER HOUR · EXAMPLE AUDIT

Example AI audit

A made-up 8-person B2B SaaS company. Here's what an honest audit looks like, including the AI they forgot was there.

TOOL AND PLAN	WHAT GOES IN	PAYS · ADMIN · DPA	TRAINING	WHERE TO CHECK	RATING	THE FIX
The AI tools you'd list						
ChatGPT Plus, the founder's own card	Customer CSV exports	No · No · No	On	Settings › Data controls	Red	Move to ChatGPT Business, or strip names before uploading
Claude Max, the founder's own card	Strategy docs, investor updates	No · No · No	Off	Settings › Privacy	Yellow	Fine for the founder's own work. Move to Team before customer data goes in
Granola Basic (free)	Every customer call	No · No · No	On	Settings › Preferences	Red	Switch training off. Tell customers they're recorded
Lovable Pro, team member's card	Prototype on a real customer export	No · No · No	Don't know	Check the tool's settings	Red	Fake data in prototypes. Always
GitHub Copilot Business	Product code	Yes · Yes · Yes	Off	Org admin manages it	Green	Check who has seats each quarter
The AI you forgot about: built into tools the company already pays for						
HubSpot (Breeze AI) Starter, company card	Contacts, deals, emails, call transcripts	Yes · Yes · Yes	On (default)	Settings › Account management › AI › Access	Yellow	Business plan, but training is on by default. Super admin switches it off
Gemini in Gmail and Docs Workspace Business Standard	Every email and doc	Yes · Yes · Yes	Off	Workspace terms; admin manages it	Green	Nothing to fix. Know it's there
Slack AI Pro, company card	Channel summaries, incl. customer threads	Yes · Yes · Yes	Off	Slack doesn't train its AI on messages	Green	Check which AI apps are added
Writing-assistant extension Free, installed by a team member	Everything typed in the browser	No · No · No	Don't know	The extension's settings	Red	Business plan, or switch it off on work sites

Score: 3 green · 2 yellow · 4 red. The reds are mostly personal plans with customer data going in.

The lesson from HubSpot: a business plan isn't the whole story. Check the AI settings inside tools you already pay for.

The company is fictional. Plan details checked against vendor help pages, October 20, 2026.