

## KEEP THIS

# Before you paste anything

*Decide this before you open the tool, not while you are typing. Once it is in, it is in.*

**Classify the job and the material together — not the document. And the strictest thing in it decides: one red sentence makes the whole thing red.**

| RED — never in a public tool            | AMBER — only with a named person's yes                            | GREEN — go ahead, then check                                       |
|-----------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------------------|
| Names of people you protect             | Internal drafts                                                   | Anything already published                                         |
| Beneficiary and participant lists       | Unpublished plans                                                 | Public documents and laws                                          |
| Unpublished sources                     | Embargoed material                                                | Invented or fictional examples                                     |
| Off-record recordings and notes         | Anything high-impact going out publicly                           | Your own drafting, with no one else in it                          |
| Case files and testimony                | Partner information                                               | Formatting, structure and slides                                   |
| Staff records and grievances            | Any tool you have not used before                                 | <b>Green is about what goes in. You still check what comes out</b> |
| Monitoring data with names in it        | <b>Cut it down to the minimum, and write down who approved it</b> |                                                                    |
| Budgets under negotiation               |                                                                   |                                                                    |
| Passwords and logins                    |                                                                   |                                                                    |
| Anyone's address, location or movements |                                                                   |                                                                    |
| Health information                      |                                                                   |                                                                    |

## Four things that are true whatever colour it is

|                                                |                                                                                                                     |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| Removing a name does not anonymize anything    | Occupation plus place plus time is a name. The combination identifies, not the label                                |
| Consent is not general                         | Someone agreeing to talk to you has not agreed to be summarised, or processed by a company they have never heard of |
| Deleting the chat does not un-send it          | It was transmitted and processed. Deleting reduces risk. It does not undo                                           |
| A privacy setting does not give you permission | Turning off training data does not make consent exist                                                               |

## If it has already happened

|                                |                                                                                         |
|--------------------------------|-----------------------------------------------------------------------------------------|
| <b>Stop</b>                    | Send nothing else. Do not try to fix it inside the same tool                            |
| <b>Contain</b>                 | Close shared links, revoke access, delete the conversation, check the retention setting |
| <b>Tell someone</b>            | The named person in your organization. <b>Today, not next week</b>                      |
| <b>Write down what changed</b> | Not who to blame. What you will do differently                                          |

**| The hard part is telling someone. It is not the deletion.**

**In my organization, the person to tell is:\_\_\_\_\_**