

In safe hands with AI

Informed, in good faith.

A friendly guide to using AI with confidence and keeping what matters private, whichever tool you use.

Why use AI?

Board work

Do what you already do well quicker and easier, so more of your time goes on judgement and oversight.

Executive development

Build your understanding of AI and your confidence in it hands-on, so you can govern it well in the companies you serve.

Personal productivity

Less friction in your own working and personal life: diary, email, travel, expenses and follow-up.

Four principles

1

Ask first

For board work, ask the board which tool is safe to use. For anything else, ask yourself: would the person or company this is about be comfortable seeing me put it into AI?

2

Keep it in the right place

Board material goes only in your board's approved tool. Keep your own work in your own set-up.

3

Share only what's needed

Give AI only the information and access the task needs and stop your chats being used to improve the AI.

4

Stay in charge

Check what AI gives you, edit it and own it before it goes anywhere. In your settings, make sure it can't send, share or delete anything without your approval.

What this looks like in practice

WHAT YOU MIGHT DO	WHAT TO WATCH	WHAT TO DO
Board work Prepare for meetings: read the papers, test ideas and assumptions and draft your questions. Keep your own meeting notes and follow up actions.	Confidential papers ending up where the company can't see or control them. AI note-takers are becoming common and people may not know one is running.	- Use only your board's approved tool. - Don't download the papers. - Check the company's rules on AI note-takers, and follow them
Executive development Try AI yourself on everyday, general tasks to see what it does well and where it gets things wrong. Build a personal library of public sources and good questions to ask when your company proposes using AI.	Confidential detail or company information creeping into your own AI tools	- Keep it general: leave out names, figures and company detail. - Save only public sources and your own questions.
Personal productivity Connect AI to your email and diary to sort, draft and schedule, or let it carry out tasks for you, so you spend less time on admin and follow-up.	A hidden instruction in an email can trick the tool into acting for someone else. Anything it can reach is exposed with it. Tools that act for you take real actions you may not see.	- Let it draft and look but not send or delete. - Keep board or company emails in a separate account it can't reach. - Review what's connected regularly and keep a log you can read. - Before you use a new AI tool or share information with it, check how trustworthy it is with an expert.

Questions to ask first, for board work

Ask the company secretary, general counsel or chair:

- Does the company have an AI policy, with guidance on what can and can't go into AI tools, and does it cover board directors?
- Is there an AI tool the board has approved for board work?
- Are the privacy settings already looked after for me, or is there anything I need to set up myself?

We aren't giving legal advice. Rules vary by company and country, so check with someone who can.

Next: set up your own tool

For your own use, outside the board's approved tool, these pages take you through the safe set-up step by step: stopping your chats being used to improve the AI, what it remembers, private chats and connected tools. Each takes about ten minutes: [the Claude page](#) and [the ChatGPT page](#).