



AI PRIVACY SETTINGS GUIDE

Where Does It Actually Go? AI Tools and Client Data

“Is it made public?” is the wrong question. Other users cannot simply search for what you type, but your words may be stored, reviewed and, depending on the plan and settings, used to improve future models. This guide explains what to check.

YOU TYPE A MESSAGE	PROVIDER SERVERS	STORED / REVIEWED	MAY IMPROVE MODELS
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Nothing is published or shown to other users, but it is no longer only on your screen. It sits on the provider’s servers. Human reviewers may access flagged conversations and, depending on your plan and settings, content may help improve the service.

Free vs paid: what changes

Plan type	Used to train the AI?
Free	Yes by default, unless you manually opt out.
Personal paid	Still by default. The same opt-out setting is needed.
Business	No by default. Training is switched off automatically.

Does paying alone protect you?

Not automatically. A personal paid subscription may still use chats for model improvement unless the setting is switched off. Business-tier plans typically disable training by default under their business terms. Storage is separate: “not used for training” does not necessarily mean “not stored.”

THE PART MOST PEOPLE MISS

Feedback buttons may allow a conversation to be reviewed or used to improve the service. Do not rate a response if that conversation contains client information.

What “private” really requires

- Use an approved business workspace for client-related work.
- Give each person their own company-managed login.
- Restrict feedback ratings or train staff never to rate a conversation containing client detail.
- Review admin privacy settings regularly because products and defaults change.

DO THIS MONTH

Move staff away from unapproved personal accounts, write one plain-English rule on client-identifying information, and schedule a quarterly privacy-settings review.



TEAM DISCUSSION GUIDE

Let's Talk About AI in Your Business

These questions are designed to start a practical conversation with principals and staff. The aim is not to produce the “right” answer. It is to make the decisions before an incident forces the discussion.

1. What are we actually using AI for?

If every person listed every AI tool used for work in the last month, including on a personal phone, would you know the full list?

TALKING POINT

Drafting renewal letters, summarising calls, refining emails and checking wording all count as AI use for work.

2. Where does client information actually go?

If a client asked whether any AI tool saw their policy details or claim history, could you answer honestly today?

TALKING POINT

Personal accounts may use content to improve models unless settings are changed. Business accounts generally disable this by default.

3. Whose job is it to know the settings?

Who knows which plans and privacy settings are in use, and when were they last checked?

TALKING POINT

If nobody can answer confidently, that is the finding. Assign ownership.

4. Where is the line between helpful and risky?

Could the team follow a simple “yes, use AI, but not for this” rule?

TALKING POINT

Discuss marketing copy, call summaries, spelling checks and documents containing names, policy numbers or medical details.

5. What happens when AI gets something wrong?

If an AI-assisted client email contained a mistake, whose responsibility would it be and would anyone catch it?

TALKING POINT

AI can confidently invent facts. A person must verify every important figure, date, term, limit and exclusion.

**FROM
DISCUSSION TO
DECISION**

Name one person to oversee AI use. Agree one rule everyone remembers about what must not be pasted into AI. Set one date to review the decision.



STEP-BY-STEP ACCOUNT SETTINGS

Locking Down Claude Pro

For a standard personal Claude Pro account, review both the model-improvement setting and how feedback is handled. Menu names and controls can change, so check the provider's current privacy documentation as well.

Step 1: Turn off model improvement

- Open Claude and go to Settings.
- Select Privacy.
- Find "Help Improve our AI models".
- Turn the setting off.

Step 2: Use Incognito chats

- Start a new chat and select Incognito mode.
- Use this whenever client-identifying or sensitive information could be involved.

Step 3: Treat feedback carefully

- Do not use thumbs-up or thumbs-down on a conversation that contains client information.
- Use a separate test conversation with no real information if you want to provide product feedback.

WHY THIS MATTERS

Turning off model improvement changes how new chats are used. It does not necessarily remove earlier data or mean that nothing is retained for safety, security or legal purposes.

Settings checklist

Setting	Where to look	What it controls
Help Improve our AI models	Settings > Privacy	Whether new chats may improve future models.
Incognito chat	New chat options	A conversation mode designed not to be used for training.
Feedback	Below a response	May submit conversation content for review or product improvement.

DO THIS TODAY

Turn model improvement off, use Incognito mode for sensitive work, and agree that staff will never rate a response containing client information. If client data is regularly involved, consider a company-managed business workspace.



STEP-BY-STEP ACCOUNT SETTINGS

Locking Down ChatGPT Plus

For a standard personal ChatGPT Free or Plus account, review Data Controls and use Temporary Chat where appropriate. Menu names and controls can change, so check OpenAI's current privacy documentation as well.

Step 1: Turn off "Improve the model for everyone"

- Open your profile menu and select Settings.
- Go to Data Controls.
- Turn off "Improve the model for everyone".
- On mobile, open the side menu, select your profile and open Data Controls.

Step 2: Use Temporary Chat

- Select Temporary Chat before typing.
- Use this whenever client-identifying or sensitive information could be involved.

Step 3: Treat feedback carefully

- Do not use thumbs-up or thumbs-down on a conversation that contains client information.
- Use a separate test conversation with no real information if you want to provide product feedback.

WHY THIS MATTERS

Turning off model improvement affects how new conversations are used. Temporary Chat provides an additional safeguard, but retention for safety, abuse prevention or legal requirements may still apply.

Settings checklist

Setting	Where to look	What it controls
Improve the model for everyone	Settings > Data Controls	Whether new chats may improve future models.
Temporary Chat	Chat screen	A conversation mode excluded from training and normal history.
Feedback	Below a response	May submit conversation content for review or product improvement.

DO THIS TODAY

Turn model improvement off, use Temporary Chat for sensitive work, and agree that staff will never rate a response containing client information. If client data is regularly involved, consider a company-managed business workspace.