AI Policy

Effective: February 2026 · Owner: Sandi Walsh · Review: Annually

Why This Policy Exists

Whether you're just getting started with AI or already using it and feeling stuck, I'm here to help. That means I need to lead by example when it comes to using it responsibly. This policy sets out how I use AI in my coaching, how I protect your information, and what you can expect from me.

How I Use AI

I use AI tools every day – both in my coaching practice and in my own work. Here's how:

- **Preparing for coaching sessions** – Reviewing notes, planning session structure
- **Creating materials** – Handouts, guides, and resources for workshops and sessions
- **My own 8O2OBrain** – A personal knowledge management system I use daily (and often demonstrate in sessions)
- **Communication** – Drafting follow-up emails and session summaries (always reviewed before sending)

I practice what I teach. If I recommend an approach to you, it's because I use it myself.

Your Privacy in Coaching Sessions

What I never put into AI tools

- Your full name, address, or contact details
- Any personal information you share in confidence during sessions
- Workplace details that could identify your employer or colleagues
- Anything you tell me you'd prefer to keep private

What I may use with AI tools

- General themes from sessions (anonymised) to improve my coaching materials
- My own session prep notes
- Publicly available information you've shared (e.g., LinkedIn posts, published work)

> **The simple test:** If it could identify you or something you told me in confidence, it doesn't go into an AI tool. Full stop.

Transparency

- If I've used AI to help create a resource or handout, I'll tell you
- I won't pretend AI-generated content is entirely my own work
- In coaching sessions, when I demonstrate AI tools, I'll explain what's happening and why
- I don't use AI to make decisions about your coaching – that's my job as your coach

What I Teach About AI

My coaching follows these principles, and I encourage the same approach for anyone I work with:

1. **Start where you are** – If you're new, free tools are enough to get going. If you're already using paid tools, let's make sure you're getting the most from them
2. **Privacy first** – Never put personal or confidential data into AI tools. If you manage client accounts (marketing, ads, business data), think carefully about what's aggregated data vs what's identifiable or commercially sensitive
3. **You stay in control** – AI is a thinking aid, not a decision-maker
4. **Check the output** – Always review what AI gives you before using it
5. **You can't break it** – Experimentation is how you learn

Human Oversight

AI supports my coaching – it doesn't replace it:

- **Every session is led by me**, not by AI
- **All materials are reviewed** by me before sharing
- **Coaching decisions** (what to cover, how to approach a topic, when to push and when to pause) are mine
- **Follow-up communications** are written or reviewed by me personally

Testimonials and Feedback

- I only share testimonials with your explicit permission
- I'll always check with you before using your name or likeness
- Anonymous feedback may be used to improve my services

Approved Tools

The AI tools I currently use and recommend:

- **ChatGPT (OpenAI)** – Often demonstrated in coaching as an accessible starting point
- **Claude (Anthropic)** – My primary AI assistant for daily work
- **8O2OBrain** – The system I coach people on using
- **Google's built-in AI features** – Within Google Workspace, Google Ads, etc.

I only recommend tools I've personally used and reviewed.

Keeping This Policy Current

I review this policy at least once a year, or sooner if:

- I adopt new tools in my coaching
- Privacy or data handling regulations change
- A client raises a concern
- I expand into new coaching areas

Questions?

If anything here isn't clear, or if you have concerns about how I use AI, just ask. You can reach me on WhatsApp, Facebook, or through the 8020Brain Coaching Corner.

The whole point of my coaching is to make AI feel less intimidating – and that starts with being open about how I use it.