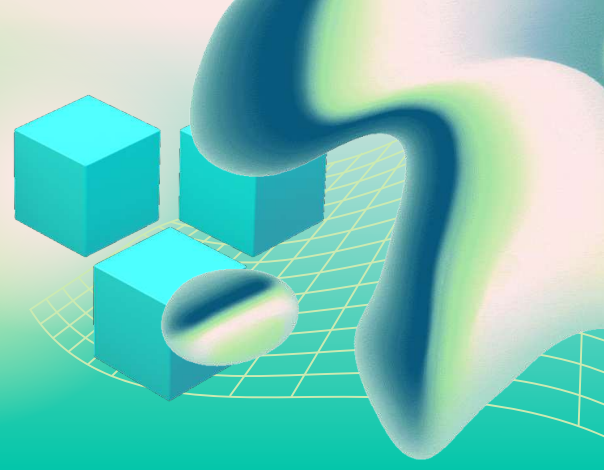


AI PROMPT SAFETY CHECKLIST

A Comprehensive Checklist to help small businesses use AI more safely



Safe AI Use Starts Before the Prompt

AI can help businesses write emails, summarize meetings, organize notes, create outlines, and speed up daily office work. However, AI also creates risk when employees paste private customer information, passwords, financial details, employee records, or internal business data into the wrong tool.

This checklist helps businesses use AI more safely by showing what to ask, what to avoid, and what to review before using AI-generated work.

SofTouch Systems helps Texas businesses create safer AI workflows, prompt templates, and usage rules that fit the way their teams actually work.

1. Approved AI Uses for Small Businesses

Use AI for low-risk tasks first.

Check any task your team may safely use AI for:

- Drafting general business emails**
- Improving email tone**
- Shortening long messages**
- Creating meeting summaries from approved notes**
- Turning notes into action items**
- Writing follow-up email drafts**
- Creating blog outlines**
- Brainstorming social media ideas**
- Drafting public-facing FAQ answers**
- Creating internal checklist drafts**

- ❑ **Simplifying technical explanations**
- ❑ **Creating training outlines**
- ❑ **Rewriting public marketing copy**
- ❑ **Organizing non-sensitive notes**

STS Tip: Start with tasks that do not require customer records, financial data, medical information, legal details, or passwords.

2. Do Not Paste This Into AI

Before using AI, check whether the content includes private or sensitive information.

Do not paste:

- ❑ **Passwords (except with use of a password manager)**
- ❑ **Login credentials (except with use of a password manager)**
- ❑ **MFA codes**
- ❑ **API keys**
- ❑ **Customer records**
- ❑ **Customer names with private details**
- ❑ **Phone numbers tied to private issues**
- ❑ **Email addresses tied to private issues**
- ❑ **Bank account information**
- ❑ **Credit card information**
- ❑ **Tax records**
- ❑ **Payroll details**
- ❑ **Employee records**
- ❑ **Employee discipline issues**
- ❑ **Medical information**
- ❑ **Legal documents**
- ❑ **Legal strategy**
- ❑ **Confidential contracts**
- ❑ **Vendor pricing agreements**
- ❑ **Internal security weaknesses**
- ❑ **Breach details**
- ❑ **Insurance documents**
- ❑ **Proprietary business plans**
- ❑ **Private meeting transcripts**
- ❑ **Unreleased product or service plans**

Safer approach: Remove or replace private details before using AI.

Example:

Unsafe:

John Smith at 555-123-4567 is disputing invoice #8891 for \$4,280.

Safer:

A customer is disputing an invoice amount and needs a clear follow-up email.

3. Safe Prompt Formula

A good prompt gives AI clear instructions without exposing private information.

Use this formula: TATSOR

Task

What do you want AI to do?

Example:

Write a follow-up email.

Audience

Who will read it?

Example:

A small business customer.

Tone

How should it sound?

Example:

Professional, friendly, and clear.

Safe Context

What does AI need to know without private details?

Example:

The customer asked about scheduling a service appointment.

Output Format

How should AI organize the answer?

Example:

Keep it under 150 words and include a clear next step.

Review Instruction

Tell AI not to invent details.

Example:

Do not add prices, promises, dates, or services not included in the prompt.

4. Safe Prompt Template for Business

Emails

Use this template:

Write a [type of email] to [audience] about [topic]. The goal is to [desired outcome]. Use a [tone] tone. Keep it around [length]. Include [safe details]. Do not include private customer information. Do not add facts, prices, promises, or deadlines that I did not provide.

Example:

Write a follow-up email to a small business owner about scheduling an AI Readiness Review. The goal is to book a 15-minute call. Use a helpful and professional tone. Keep it under 125 words. Mention that SofTouch Systems can help create safe AI prompt templates for business communication. Do not add prices or promises.

5. Safe Prompt Template for Meeting

Summaries

Use this template:

Summarize these meeting notes for internal business use. Create sections for key topics, decisions made, action items, owners, deadlines, and open questions. Do not add information that is not included. Mark any missing owner or deadline as “needs clarification.” Do not include private customer, financial, legal, medical, or employee information.

Use this for approved notes only. Do not upload private meeting transcripts into unapproved AI tools.

6. Before You Send or Share AI Output

AI can sound confident and still be wrong. Review every AI-assisted message before sending it.

Check each item:

- Did AI invent any facts?**
- Are names spelled correctly?**
- Are dates correct?**
- Are prices correct?**
- Are deadlines correct?**
- Does the tone match your business?**
- Is the message too long?**
- Did AI include private information?**
- Did AI make a promise your business cannot keep?**
- Did AI mention a service you do not offer?**
- Is there a clear next step?**
- Would you say this message out loud to a customer?**

If any answer creates doubt, revise the message before sending it.

7. AI Tool Approval Checklist

Before employees use an AI tool for business, ask these questions:

- Is this tool approved by the business?**
- Is the employee using a business account, not a personal account?**
- Does the tool store prompts or uploaded files?**
- Can the business control user access?**
- Can the business remove users when employees leave?**
- Does the tool connect to email, calendars, cloud storage, or customer files?**
- Does the tool use business data for model training?**
- Can admins review settings?**
- Is MFA turned on?**
- Are passwords stored in a business password manager?**
- Does the team know what not to upload?**
- Is there a written AI use policy?**

If several answers are “not sure,” slow down before using the tool with business data.

8. Common AI Mistakes Small Businesses Should Avoid

Avoid these habits:

- Letting each employee choose random AI tools**
- Using personal AI accounts for business work**
- Pasting customer emails without removing private details**
- Uploading meeting transcripts without approval**
- Trusting AI output without review**
- Letting AI send emails automatically without human approval**
- Saving AI-generated files in the wrong place**
- Giving AI tools unnecessary access to email or cloud storage**
- Using AI for legal, medical, HR, or financial decisions without expert review**
- Skipping employee training**

AI should help your team work better. It should not create a new data mess.

9. When to Ask SofTouch Systems for Help

Your business may need help if:

- Employees already use AI without rules**
- You do not know which AI tools are safe for business use**
- Your team handles sensitive customer data**
- You need safe prompt templates**
- You want AI email workflows**
- You want AI meeting-summary workflows**
- You need an AI use policy**
- You want to protect AI accounts with MFA and password management**
- You need help separating personal AI use from business AI use**
- You want AI connected to email, meetings, documents, or task workflows**
- You want training before employees adopt AI across the business**

SofTouch Systems can help small Texas businesses choose practical AI tools, create safe usage rules, build prompt templates, and set up workflows that match real daily work.

Final Checklist: Safe AI Prompt Review

Before using AI for business, ask:

- Is this task appropriate for AI?**
- Did I remove private information?**
- Am I using an approved tool?**
- Did I write a clear prompt?**
- Did I tell AI not to invent details?**
- Did I review the output before using it?**
- Did I store the final version in the right place?**
- Does my team know how to repeat this safely?**

If not, fix the process before making AI part of daily work.

Contact SofTouch Systems Today

AI can help your business write better emails, summarize meetings, organize notes, and improve daily workflows. However, your team needs safe tools, clear rules, and practical prompt templates before AI becomes part of daily operations.

SofTouch Systems helps small Texas businesses use AI safely and practically.

Schedule a free 15-minute AI Readiness Review to find out where AI can help your business, where it may create risk, and what your team should set up first.

SofTouchSystems.com

No-Surprise IT – Predictable. Proactive. Proven.