What should be removed from a business document before sending it to an AI tool?

For: Paušalni obrt · Obrtnici · j.d.o.o. · d.o.o.

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Applicability: Practical application according to the circumstances of the business

Use only the minimum data required for the task. Remove unnecessary identifiers, access credentials and confidential business details, and verify the tool's terms and conditions.

What does that mean in practice?

Replacing a name with initials does not necessarily mean that the person can no longer be identified. A combination of address, job title and circumstances can also reveal identity.

For sensitive workflows, pre-define the permitted tools and data types. Do not introduce automation simply because it is technically possible.

An example from everyday business

For the draft response to an objection, a fictitious name is used and a concise description of the problem is provided without the order number or personal contacts.

Specific next steps

1. Explain the task with a made-up example when it is sufficient.
2. Remove names, contacts, identification numbers and secret access credentials.
3. Check the output before business use.

Most common mistakes

• Send the entire client export for a single example.

• Download the AI response without professional verification.

Limits of application

Editorial business guideline. The example is illustrative; it is not a legal, tax or accounting calculation.

Original page

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