IMAGINE BEYOND

# Imagine Beyond AI Use Policy

## 1. Purpose and scope

Imagine Beyond uses AI to work faster and think more broadly, never to replace the judgement, care and expertise our clients pay for. This policy sets out how we do that safely and transparently.

It applies to everyone who works for or with Imagine Beyond: the Director, employees, associates, contractors and virtual assistants. It covers every AI tool used for Imagine Beyond work, including generative AI (such as Gemini, ChatGPT, Claude and Perplexity), AI features inside other software (Grammarly), and AI agents that take actions on our behalf.

It sits alongside our client contracts, our privacy notice and our obligations under UK GDPR and the Data Protection Act 2018. Where they conflict, the stricter rule applies.

## 2. Our principles

1. **Human first.** AI assists our unique thinking; a person is always accountable for what we deliver.
2. **Confidentiality by default.** Client information is steadfastly protected as if it were our own reputation, because it is.
3. **Accuracy before speed.** Nothing AI-generated ever reaches a client without human review and judgement to ensure it's the best fit for the client's needs, accurate and to the highest standards.
4. **Authenticity.** Our frameworks, stories and insights carry our voice and unique expertise. AI never speaks for us.
5. **Transparency.** We are open with clients about how we use AI, and we never present AI as a person.
6. **Fairness.** We do not use AI to profile or judge people.

## 3. Approved tools

Only the approved tools and account types below may be used for Imagine Beyond work. Free accounts **must not** be used. Paid individual plans, such as Claude Pro, are permitted only with model-training settings **switched off**, because their terms may otherwise allow the provider to use your inputs to train its models.

| Tool | Account type | Approved for | Notes |
|---|---|---|---|
| Google Workspace with Gemini | Imagine Beyond business account (paid) | All work, within the data rules in section 4 | Google does not use our data to train its AI without permission. |
| Claude | Claude Pro (paid individual plan) | All work, within the data rules in section 4 | Keep the model-training setting switched off in privacy settings; check it every six months |
| ChatGPT | Paid individual plan (Plus or Pro) | Research, ideas, drafting | Keep "Improve the model for everyone" switched off in data controls; check it every six months. Free accounts not permitted |
| Perplexity | Pro paid account | Researching academic papers | Never input confidential information. |

To add a tool, ask the Director. Before approving it, we check: who owns the outputs, whether inputs are used for training, where data is stored, and whether it is in beta.

Beta, preview or "Pre-GA" features must not be used with client or personal data. Providers offer them with fewer protections and may withdraw them without notice.

## 4. Data rules: what can go into AI tools

If in doubt, leave it out. Even on business accounts, providers may review prompts flagged for suspected misuse, so treat every prompt as something another person could read.

| Category | Examples | Rule |
|---|---|---|
| **Green: allowed** | Public information, our own published content, general workshop themes, anonymised scenarios | Use freely on approved tools |
| **Amber: with care** | Non-sensitive briefs, draft proposals, internal Imagine Beyond material | Approved tools and accounts only; remove anything not needed for the task |
| **Red: never** | Named individuals' assessment results, coaching notes or session content, health or other special category data, passwords, bank details, anything a client confidential, unpublished strategy and IP (e.g. book content, new frameworks, etc). | Do not enter into any AI tool |

Before entering client material, anonymise it: replace names with roles ("the CEO"), remove identifying details, and summarise rather than paste whole documents.

Where a client contract sets stricter rules on AI or data, the contract always supersedes.

## 5. Human review and accuracy

AI tools can produce confident, plausible and wrong answers, and providers state that their output is not designed to meet our legal or professional obligations. The person who uses the tool owns the result.

Before anything AI-assisted leaves Imagine Beyond:

- ☐ Facts, statistics and research claims are checked against an original, credible source
- ☐ Neuroscience and psychology claims are traced to published research, not repeated from AI summaries
- ☐ Quotes and attributions are verified, and no quote is invented
- ☐ Content is checked for bias, stereotyping and cultural assumptions, given our global client base
- ☐ The tone sounds like Imagine Beyond, not a generic assistant

AI must never be the sole basis for advice to a client, a coaching intervention, or a judgement about an individual.

## 6. Intellectual property and authorship

Our proprietary frameworks, models, book and digital products are the heart of Imagine Beyond's value. AI providers may give similar outputs to other users, so raw AI output is neither distinctive nor reliably protectable.

- **Human authorship.** Core frameworks, signature models and published content are created and substantially shaped by a person. AI may support research, structure and editing.
- **Records.** Keep drafts and notes that show the human development of key frameworks and products.
- **Third-party material.** Do not ask AI to reproduce or imitate other authors', trainers' or companies' copyrighted material or branded frameworks.
- **Client IP.** Do not feed client-owned materials into AI to create products for other clients.
- **Ownership.** Work produced with AI for a client is treated under that client's contract in the same way as any other deliverable.

## 7. AI agents and automation

Imagine Beyond is fully responsible for anything an AI agent does on its behalf, including any costs it runs up. Agents therefore operate with the minimum access they need and a person approves consequential actions.

| Action | Rule |
|---|---|
| Drafting, summarising, organising files, research | Agent may act; a person reviews the output |
| Sending emails or messages to clients or prospects | Never autonomous. A person approves each message before it is sent |
| Accepting terms, cookies or contracts; signing documents | Never autonomous. A person only. Agents must never do this |
| Payments, purchases, subscriptions or spending | Never autonomous. A person only. Agents must never do this |
| Deleting, moving or sharing data that cannot easily be undone | A person must always approve first |
| Any decision affecting an individual's employment, selection or development | Never autonomous. A person decides; AI may only inform |

Agents must never:

- Pretend to be a person, or hide that a message was AI-generated where this would mislead
- Generate artificial engagement on LinkedIn or elsewhere (automated likes, comments, connection requests or fake accounts)
- Scrape websites against their terms, or get around paywalls or access controls
- Be given passwords, admin rights or access beyond what the task needs

Human-confirmation safeguards built into tools must not be switched off. If they are, the liability rests with us.

## 8. Assessments, coaching and personal data

People trust us with information about their careers, challenges, behaviours and aspirations, and that trust is the foundation of coaching. AI must never put it at risk.

- **Coaching.** Session content and notes are never entered into AI tools. AI may only help design questions or tools in general terms.
- **Assessments.** Individual results are never processed by AI.
- **No profiling.** We do not use AI to infer protected characteristics (such as gender, ethnicity, age or disability), or to profile people without their consent.
- **High-stakes decisions.** Where a client may use our assessments for hiring, promotion or redundancy, a human makes the decision and the participant is told AI was involved. Under UK GDPR, people have rights regarding significant decisions made solely by automated means.
- **Research data.** Survey and research data, including diversity data such as for our Women in Leadership work, is anonymised before any AI analysis.

Our privacy notice explains to clients and participants how AI is used in processing their data.

## 9. Transparency with clients

We tell clients how we use AI before they ask. This builds trust and anticipates the questions procurement teams increasingly raise.

- Proposals and contracts include a short statement on our AI use, covering which tools we use, what data never goes into them, and that a person reviews every deliverable.
- If a client prefers that AI is not used on their work, we respect that and record it in the engagement file.
- When AI has materially shaped a deliverable, such as a summary, we explain how.

## 10. Roles, breaches and review

The Director owns this policy, approves tools and decides on exceptions. Everyone covered by it reads and confirms it before starting work, and raises questions early rather than guessing.

**If something goes wrong:** if confidential or personal data is entered into an AI tool by mistake, or an agent acts outside its instructions, tell the Director the same day. We assess whether it is a personal data breach; if it is, UK GDPR requires us to report it to the ICO within 72 hours where it poses a risk to individuals. We also inform the affected client where appropriate.

Breaching this policy may lead to the end of an associate or contractor engagement.

**Review:** this policy is reviewed every six months, and whenever a provider materially changes its terms or we adopt a new tool or agent.