Artificial Intelligence Policy

Personal Summits
Effective Date: January 2026
Policy Owner: Richard Bisiker/Managing Director
Review Date: January 2027

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1. Purpose and Scope

1.1 Statement of Intent

Personal Summits employs artificial intelligence (AI) tools in a controlled and limited capacity to support internal operations, specifically in the areas of marketing ideation, content development, and background research. This policy establishes the framework for responsible AI use within our organisation, ensuring alignment with our core values of trust, confidentiality, and professional integrity.

All AI deployment is subject to rigorous human oversight and operates within the boundaries established by the Institute of Directors (IoD) Code of Conduct for Directors and applicable UK legislation, including the UK General Data Protection Regulation (UK GDPR).

1.2 Scope of Application

This policy applies to all AI tools currently or prospectively used by Personal Summits, and governs their application across all business functions. As of the effective date, AI use is restricted to the founder, with all applications limited to internal marketing support activities.

2. Organisational Context

Personal Summits is a UK-based professional services firm specialising in executive coaching and personal development for business leaders. Our client base primarily comprises directors and senior executives of small and medium-sized enterprises (SMEs) who seek to enhance their leadership effectiveness, strategic clarity, and professional performance.

3. Current AI Applications

3.1 Approved Uses

Personal Summits currently utilises AI platforms, including Claude by Anthropic, for the following purposes:

- **Marketing ideation:** Generating concepts and approaches for marketing campaigns and communications
- **Content development support:** Assisting with the creation of marketing materials and thought leadership content
- **Background research:** Conducting preliminary research on topics relevant to our target audience and business environment

3.2 Prohibited Uses

AI tools are explicitly **not** authorised for:

- Direct client service delivery or client-facing interactions
- Coaching session preparation, facilitation, or follow-up
- Personal development programme design or delivery
- Any form of client relationship management beyond publicly available testimonial reference

4. Governance and Accountability

4.1 Access Control

As of the effective date of this policy, AI tool access is restricted exclusively to the founder of Personal Summits. No delegation of AI permissions has been granted to other parties.

4.2 Human Oversight Requirements

All AI-generated outputs are subject to mandatory human review and editorial control prior to any external use or publication. Specifically:

- No AI-generated content may be published, distributed, or used externally without thorough human review and editing
- All final outputs must be verified for accuracy, brand alignment, and professional standards
- The reviewing individual assumes full responsibility for all published materials, regardless of AI involvement in their creation

4.3 Accountability

Personal Summits maintains complete responsibility for all content and materials produced with AI assistance. AI tools are considered support instruments rather than autonomous content producers, and human judgment remains the final authority in all decision-making processes.

5. Transparency and Disclosure

5.1 Client Communication

While AI tools are employed for internal marketing content development, this use is not routinely disclosed to clients or the public, as all final outputs undergo substantial human review, editing, and quality assurance to ensure alignment with our brand voice and professional standards.

5.2 Policy Availability

This policy is available upon request to clients, partners, and other stakeholders who wish to understand our approach to AI governance.

6. Data Protection and Privacy

6.1 Client Data Safeguards

Personal Summits maintains strict protocols to protect client confidentiality in relation to AI use:

- No personal or sensitive client data is input into AI systems under any circumstances
- No confidential information from coaching sessions, including notes, personal goals, or identifying details, is shared with AI platforms
- No client files or records are processed through AI tools

6.2 Limited Exception

The only client-related content that may be referenced in AI interactions consists of publicly provided testimonials, and only when relevant to marketing content ideation. Such use is limited to content that clients have explicitly authorised for public use.

6.3 Compliance Framework

Our AI practices are designed to ensure full compliance with:

- UK General Data Protection Regulation (UK GDPR)
- Data Protection Act 2018
- Privacy and Electronic Communications Regulations (PECR)
- Any other applicable data protection and privacy legislation

7. Ethical Standards and Professional Alignment

7.1 Professional Code Adherence

Personal Summits is committed to conducting all business activities, including AI use, in accordance with the Institute of Directors (IoD) Code of Conduct for Directors. Our AI governance framework reflects the following core principles:

- **Integrity:** Ensuring honesty and ethical behaviour in all AI applications
- **Accountability:** Maintaining clear responsibility for AI-assisted work
- **Professional competence:** Using AI to enhance, not replace, human expertise
- **Duty of care:** Protecting client interests and maintaining confidentiality
- **Transparency:** Being open about our practices when appropriate

7.2 Responsible Innovation

We recognise that AI technology is rapidly evolving. Our approach to AI adoption is characterised by careful consideration, ethical reflection, and a commitment to using emerging technologies in ways that uphold rather than compromise our professional standards.

8. Limitations and Boundaries

8.1 Prohibited Applications

To safeguard service quality and maintain ethical standards, the following limitations are permanently in effect:

AI tools shall not be used for:

- Client-facing work of any kind, including communications, reports, or presentations delivered directly to clients
- Delivery of coaching services, including session facilitation, coaching conversations, or follow-up activities
- Replacement of human judgment in any professional decision-making capacity
- Generation or provision of legal advice or legal interpretation
- Generation or provision of medical advice or health-related recommendations
- Generation or provision of financial advice or investment recommendations
- Processing of confidential client information or sensitive personal data

8.2 Rationale

These boundaries exist to:

- Preserve the integrity and quality of our professional services
- Protect the trust placed in us by our clients

- Ensure that human expertise, judgment, and relationship-building remain central to our service delivery
- Maintain compliance with professional standards and regulatory requirements

9. Policy Review and Amendment

9.1 Review Cycle

This policy will be reviewed annually, with the next scheduled review in January 2027, or earlier if:

- Significant changes occur in AI technology or capabilities
- New legal or regulatory requirements are introduced
- Material changes are made to our business operations or AI use cases
- Incidents or concerns arise that warrant policy revision

9.2 Amendment Authority

Amendments to this policy may only be authorised by the founder/managing director of Personal Summits. All substantive changes will be documented and communicated to relevant stakeholders.

10. Contact and Questions

For questions regarding this policy or Personal Summits' use of AI technology, please contact:

Personal Summits, Staffordshire.UK

Document Control

Version 1.0

Date 20.01.2026

This policy reflects Personal Summits' commitment to responsible innovation, ethical practice, and the highest standards of professional service delivery.