HARBOR TOOLS · LUNCH & LEARN

Using generative AI safely at work

Thirty minutes on what to use it for, what to keep out of it, and the three rules that apply to everyone at Harbor Tools.

380 people surveyed

3 company rules

1 prompt pattern to take away

SESSION

All staff · 30 minutes · no prior experience needed

DATE

16 November 2026

QUESTIONS

IT help desk · extension 2400

WHAT WE WILL COVER

Five questions, thirty minutes, then the floor is yours

01

Where we stand today

What 380 of you told us in the staff survey.

02

Good jobs, poor jobs

The one test that separates them.

03

The three rules

Inputs, outputs, and what you tell your manager.

04

How to ask well

Role, goal, material, output format.

05

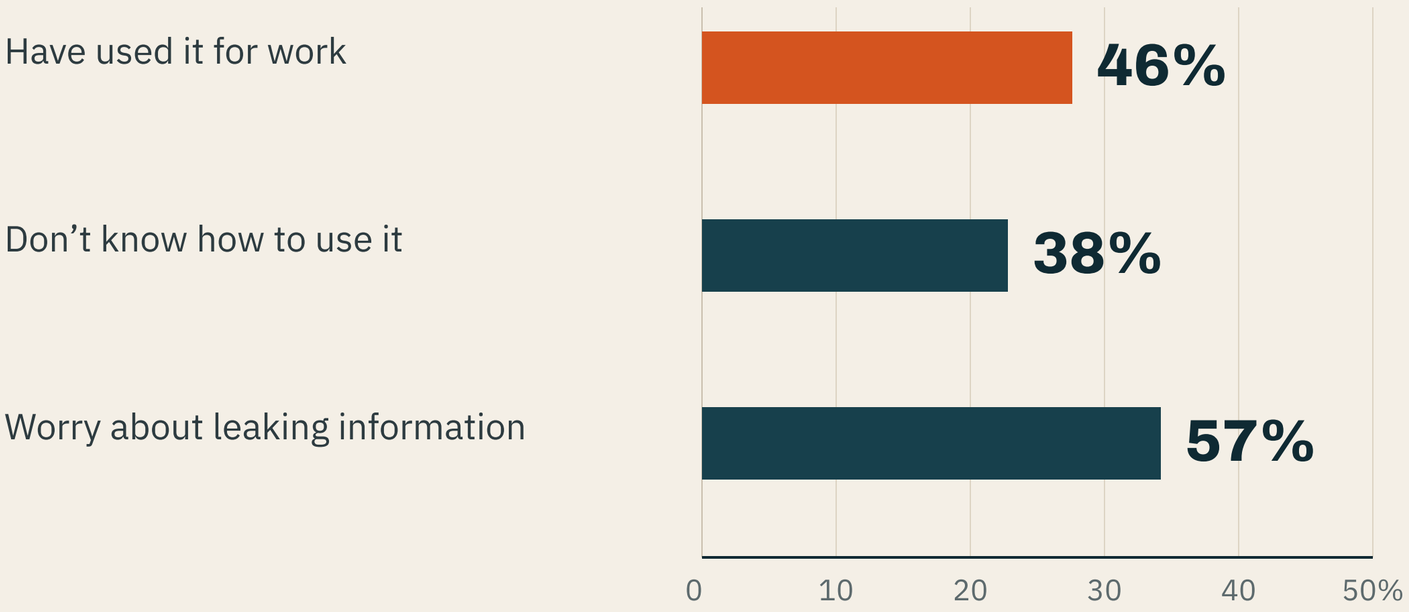
What it gave sales

A four-week trial and the minutes it returned.

ⓘ Interrupt at any point. If a question needs a real answer rather than my guess, we write it down and the IT help desk follows up on extension 2400.

Nearly half of us already use it — and more than half are worried about leaks

Staff survey, 380 responses. The gap between the first bar and the last two is the reason for this session.



WHAT THAT TELLS US

Use is already here. This is not a decision about whether to start. It started.

The blocker is know-how, not willingness. 38% say they simply don’t know how.

The worry is the right worry. 57% named leaking information — rule 1 exists for exactly that.

Source · Harbor Tools staff survey, 380 respondents

It is good at starting work and poor at being the last word

✓ GOOD USES

Work where a rough start saves you real time and you will edit it anyway.

- First drafts
- Summarising meeting notes
- Spreadsheet formula questions
- Brainstorming

⊘ POOR USES

Work where being confidently wrong costs a customer, a contract or a number.

- Checking current figures
- Final calls on legal or contract matters
- Using calculations without checking them

THE ONE TEST | “Am I asking it to start something I will finish — or to decide something I won’t check?”

Three rules cover the whole company: guard the input, check the output, say what you used

1

Never enter customer names, personal data or unpublished numbers.

Covers the input box. Describe the situation generically; strip the name, the account number, the figure that isn’t public yet.

2

A person checks every output before it is used.

Covers the output. Your name is on it, so you own it — the draft is never the deliverable.

3

Tell your manager which parts of an external document were written with AI.

Covers anything leaving Harbor Tools. Not a confession — it tells your manager where to look twice.

RULE 1 IN PRACTICE

You can describe almost any problem without the details that must stay inside

The same question, twice. Strip the three kinds of detail rule 1 names, and the answer you get back is just as useful.

DON'T TYPE THIS

"Write a follow-up email to [customer name] at [their home address] explaining that our [unreleased Q4 price list] puts their renewal up by 9%."

Three breaches in one sentence: a named customer, personal data, and a number we have not published.

STRIP THE DETAILS

TYPE THIS INSTEAD

"Write a follow-up email to a long-standing business customer explaining that their renewal price is rising, in a calm tone, around 150 words."

Nothing confidential left your desk, and the draft still needs only the name and the figure pasted in by you.

KEEP OUT · 1	KEEP OUT · 2	KEEP OUT · 3
Customer and client names	Personal data of any individual	Numbers we have not published

RULE 2 IN PRACTICE

Checking the output takes a minute, and what you check depends on the job

Pair every use from section 02 with the check that makes it safe to send. The left column is where the time goes; the right column is where the risk goes.

WHAT YOU ASKED FOR	THE CHECK BEFORE IT IS USED	WHAT GOES WRONG WITHOUT IT
A first draft	Read it as the recipient. Cut anything you would not say yourself.	It sounds like nobody at Harbor Tools.
A summary of meeting notes	Check every decision and owner against the notes you pasted in.	An action lands on the wrong person.
A spreadsheet formula	Run it on a few rows where you already know the answer.	A wrong total spreads across the file.
Brainstormed ideas	Keep the two that fit our customers; drop the rest without arguing.	A long list nobody can act on.
Anything numeric, legal or contractual	No check makes it safe — take the figure from the source and the call from a person.	A confident, wrong answer leaves the company.

04 · HOW TO ASK WELL

Four parts in order turn a vague request into a usable answer

This is the pattern for the 38% who said they don’t know how to use it. Say who it should be, what you want, what it has to work from, and the shape of the answer.

01
Role
Who should be answering.

→

02
Goal
What it is for, and for whom.

→

03
Material
What it works from — minus rule 1.

→

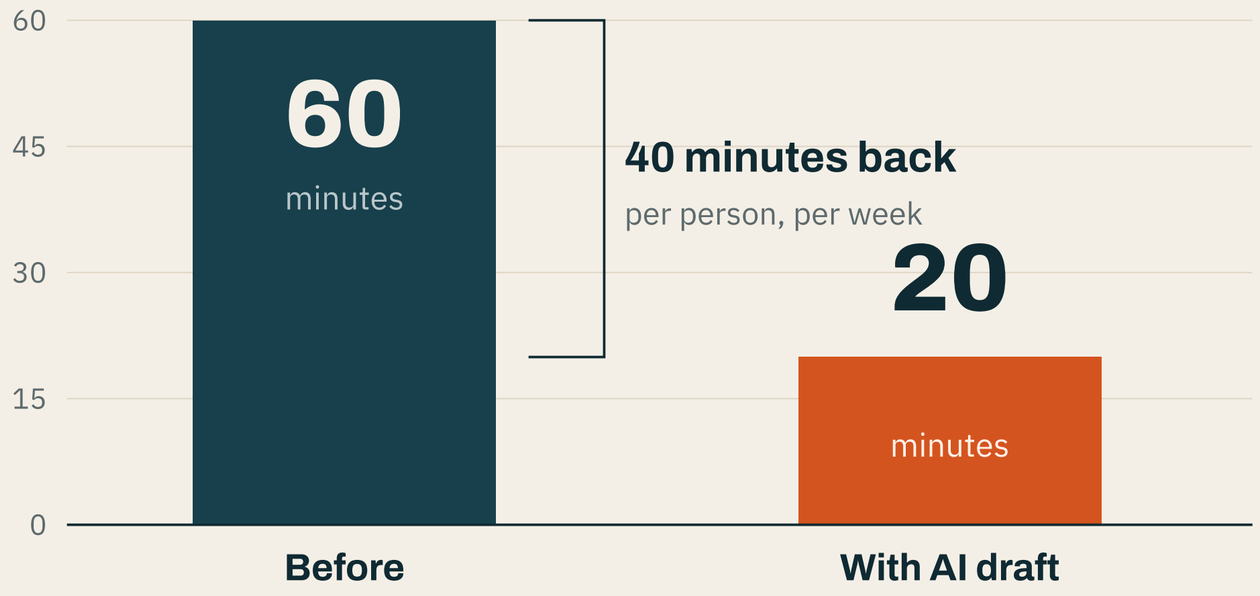
04
Output format
Length, shape, how many.

WORKED EXAMPLE

“You are a senior sales rep. For a new hire, list things to prepare before a client visit — five of them.”

Role — senior sales rep **Goal** — help a new hire **Material** — preparing for a client visit **Output** — a list of five

The weekly report went from 60 minutes to 20 — the same report, drafted then checked



THE TRIAL, HONESTLY SCOPED

TEAM

Sales · 8 people

LENGTH

4 weeks

TASK

The weekly report — drafted with AI, then checked by the writer

Small trial, one task, one team. It is a reason to try the pattern on your own routine writing — not a company-wide promise.

Source · Harbor Tools sales trial, 8 people over 4 weeks

TAKE THIS AWAY

Guard the input, check the output, say what you used — and ask in four parts

01 Use it to **start** work you will finish: drafts, summaries, formula questions, brainstorming.

02 Don’t use it to **decide**: current figures, legal and contract calls, unchecked calculations.

03 No customer names, personal data or unpublished numbers in the box. Ever.

04 A person checks every output, and your manager hears which parts of an external document were AI-written.

05 Ask in four parts: role → goal → material → output format.

06 One task this week: the document you write every week. Draft it, check it, keep the 40 minutes.



QUESTIONS, NOW OR LATER

IT help desk · extension 2400