

How we use Claude at Example Ltd

One page. It says what Claude may be used for, what may and may not go into it, where the data sits, who approves what, and who to ask. It is reviewed every six months or when a system changes.

1. WHAT CLAUDE IS HERE FOR

- Drafting, summarising and checking our own work: emails, quotes, proposals, reports, meeting notes.
- Answering questions from the documents we loaded on the Day (our price list, templates, procedures, product sheets).
- Reading our ledger and CRM through the connectors the admin switched on, to answer "what is overdue", "which orders shipped", "who asked for a quote".
- From week three, the order-desk agent raises sales orders for existing customers under 500 GBP on its own. Everything else it prepares for a person.

2. WHAT MAY GO INTO CLAUDE

- Our own business documents and records, through the folders and connectors named in section 4.
- Customer and supplier business details needed for the task: company name, order, invoice, delivery address, business email.
- A customer's message, to draft the reply.

3. WHAT MAY NOT GO INTO CLAUDE

- Bank card numbers, passwords, log-in details, or security answers, ours or a customer's.
- Health or other special-category data, or criminal-record data, about a named person: not unless a specific process has been approved in writing after a data protection impact assessment that records the legal condition relied on.
- Payroll files and HR files about named employees, outside the HR folder the admin has set up with its own permissions. Claude is not used to make or recommend decisions about hiring, pay, performance, discipline or dismissal, and staff are told in the staff privacy notice that Claude is used, and for what.
- Anything a client has told us is confidential beyond the engagement, until the client has agreed in writing.
- Another company's documents that we hold under a non-disclosure agreement.

4. WHERE THE DATA SITS

Layer	Who processes it	Where
Claude seats (what staff type; the folders and connectors switched on). Team seats only for customer or staff personal data	Anthropic Ireland, Limited, under its commercial terms and data processing addendum, which includes the UK Addendum; Anthropic may not train on our content	Anthropic's infrastructure, United States
The connectors Svennis runs between our ledger and the agent	Svennis Cloud Solutions Ltd, under our processing agreement	London, AWS eu-west-2
The order-desk agent	Svennis, on Amazon Bedrock, sub-processors listed in the agreement	London, eu-west-2
Build and support access	Svennis Cloud Solutions SRL under a written processing agreement	Romania (UK adequacy)

Folders Claude may read: *Sales / Price lists, Sales / Templates, Operations / Procedures, Products*. Connectors switched on: Microsoft 365 (mail, calendar, files in those folders), Zoho Inventory, Zoho CRM, Zoho Books (read). Nothing else is loaded without the admin adding it here.

5. WHO APPROVES WHAT

- Anything sent to a customer or supplier is read by a person before it goes, except the orders the agent is allowed to raise on its own (section 1).
- A claim, a refund, a complaint, a new customer's first order, or anything about a person's health, legal position or money always goes to a person.
- Claude's answer is checked against the source when the figure matters: a price, a date, a VAT amount, a stock level.
- New connectors, new folders and new agents are approved by the managing director and added to section 4.

6. IF SOMETHING GOES WRONG

- A wrong message sent, a document shared by mistake, or data entered that should not have been: tell the admin the same day; we correct the record, tell the customer where needed, and log it.
- Personal data involved: tell the data protection lead at once. They decide within 24 hours whether it must be reported. If it must, the ICO is told within 72 hours of our becoming aware of it, and the people affected without undue delay where the risk to them is high. Every breach is logged, reported or not.
- Questions about this policy: the admin first, then Svennis under Run and grow, 08:00 to 18:00 UK time, Monday to Friday.