**Worksheet: Redaction Challenge - Prepare for AI Summary**

**Scenario**

You need a quick, high-level summary of the email below. However, your organization only allows the use of a **public, cloud-based AI chatbot** (like ChatGPT or Gemini) for summarization, which logs all user inputs for training.

Your task is to **redact and rewrite** the email, removing all **Personally Identifiable Information (PII)**, **Confidential Financials**, and **Proprietary/Strategic Details** that should never leave the company network.

**The Original Email (Analyze for Risk)**

**Subject:** Q3 Budget Review & Personnel Update - [Project Chimera] **From:** Janice C. (janice.cruz@[companydomain].com) **To:** Daniel V. **Date:** Tuesday, Oct 22

Dan,

Thanks for compiling the Q3 figures. The key takeaway is the 40% year-over-year growth in the APAC region, driven entirely by the new 'Chimera' launch. While the revenue figure of **$14,875,221** is excellent, the total spend exceeded budget by 12.5%. We need to address this with Maria Rodriguez (Employee ID 7709) during her disciplinary review on Friday. She is based out of the Barcelona office, and her personal address is 123 Carrer de la Pau, 08002 Barcelona.

I also need you to update the Q4 forecast strategy memo. Make sure you don't use the term "Project Hydra" externally. We are only releasing that strategy to clients once the legal team clears the final T&Cs (last revised 2024-09-15).

Please send the sanitized version to me first. Janice C.

**The Redaction Guide (Use These Categories)**

Before rewriting, review the email and identify items that fall into these HIGH-RISK categories. You must replace the sensitive text with a tag like **[REDACTED - CATEGORY]**.

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| | **Scenario** | **Risk Level** | **Key Rationale (for facilitator debrief)** | | --- | --- | --- | | **1. Drafting a Public Email:** Asking a public chatbot to write a generic, professional email announcing a new public-facing event. | **Green (Low Risk)** | No confidential data is shared; the information is already public. | | **2. Analyzing Client PII:** Copying and pasting a client's **full legal name, personal phone number, and detailed financial history** into the AI to analyze their creditworthiness. | **Red (High Risk)** | Direct sharing of **PII** (Personally Identifiable Information) and **regulated financial data**. Violates legal and compliance rules. | | **3. Summarizing Proprietary Strategy:** Asking an AI to summarize a **confidential, internal Q4 business strategy report** that contains unreleased market forecasts and competitor research. | **Red (High Risk)** | Sharing highly **sensitive corporate data**. Even if the AI doesn't misuse it, the data is logged by an external service, creating security and competitive exposure. | | **4. Generating Code for a Public Project:** Using an AI to write a short, simple JavaScript function for a non-sensitive internal web application. | **Green (Low Risk)** | Simple, non-sensitive task using generic code. (Caution if the code involves specific proprietary database names or credentials). | | **5. Testing a Policy Idea:** Describing a **hypothetical, fictional scenario** to the AI to help generate alternative phrasing for a new HR policy draft. | **Green (Low Risk)** | Use of **hypothetical examples** is a key safe practice as it avoids sharing any real data or PII. | |  |  |

**Your Redacted, Safe-for-AI Version**

*(Rewrite the email below, replacing all sensitive information with the appropriate [REDACTED] tags. The resulting email should still be understandable for a general summary.)*

**Subject:** Q3 Budget Review & Personnel Update **From:** [REDACTED - NAME] **To:** [REDACTED - NAME] **Date:** [REDACTED - DATE]

[REDACTED - NAME],

Thanks for compiling the Q3 figures. The key takeaway is the high year-over-year growth in the [REDACTED - REGION] region, driven entirely by the new product launch. While the revenue figure of **[REDACTED - REVENUE]** is excellent, the total spend exceeded budget by **[REDACTED - VARIANCE]**. We need to address this with an employee during their disciplinary review on [REDACTED - DAY].

I also need you to update the Q4 forecast strategy memo. Make sure you don't use the term **[REDACTED - STRATEGY]** externally. We are only releasing that strategy to clients once the legal team clears the final T&Cs.

Please send the sanitized version to me first. [REDACTED - NAME]

**Reflection**

1. **Which risk was the most complex to identify?** (Financial figures vs. the disciplinary review/address, etc.)
2. **What is the remaining risk?** (Even if redacted, is the **context** of a disciplinary review still too sensitive to share with a public AI?)