

GDPR + AI Quick Checklist for Local Businesses (2026)

A practical plain-English checklist to help you stay on the right side of data protection while using AI tools responsibly. This is guidance, not legal advice - when in doubt, check with a qualified professional.

1) Website forms and enquiries

	Checklist item	Notes (optional)
■	Only collect what you need (usually name, email/phone, message).	
■	Your privacy policy is easy to find (footer link on every page).	
■	Form submissions go to the correct email and are stored securely.	
■	You have a process for deleting old enquiry emails/records you no longer need.	

2) Email marketing and mailing lists

	Checklist item	Notes (optional)
■	You can explain why someone is on your list (opt-in, customer relationship, etc.).	
■	Every marketing email includes a clear unsubscribe option.	
■	You don't upload old contact lists without checking lawful basis.	
■	You regularly clean lists (remove inactive, bounced, or outdated contacts).	

3) Cookies, pixels and tracking

	Checklist item	Notes (optional)
■	Cookie banner is working and gives real choice (accept/decline where required).	
■	Tracking tools are listed clearly in your cookie policy (e.g., Analytics, Meta Pixel).	
■	You only track what you genuinely use and understand (avoid 'set and forget').	

4) Using AI tools safely (the big one for 2026)

	Checklist item	Notes (optional)
■	You do not paste customer personal data into public AI tools (names, emails, invoices, HR docs).	
■	You use AI for drafting and brainstorming, but you review and edit before publishing.	

■	You have a simple internal rule: what's allowed vs not allowed (even a one-page policy).	
■	You avoid uploading confidential documents unless you're using an approved, secure setup.	

5) Staff habits that prevent most mistakes

	Checklist item	Notes (optional)
■	Someone double-checks bulk emails before sending (BCC, attachments, recipients).	
■	Staff get a short refresher every quarter (15 minutes is enough).	
■	You know what to do if a mistake happens (who to tell, what to record, what to fix).	

Quick rule of thumb: If you wouldn't email it to someone outside your business, don't paste it into a public AI tool.

Need help? Engagio.ie can help you tidy up website forms, cookie setup, email opt-ins, and put a simple AI policy in place - in plain English.