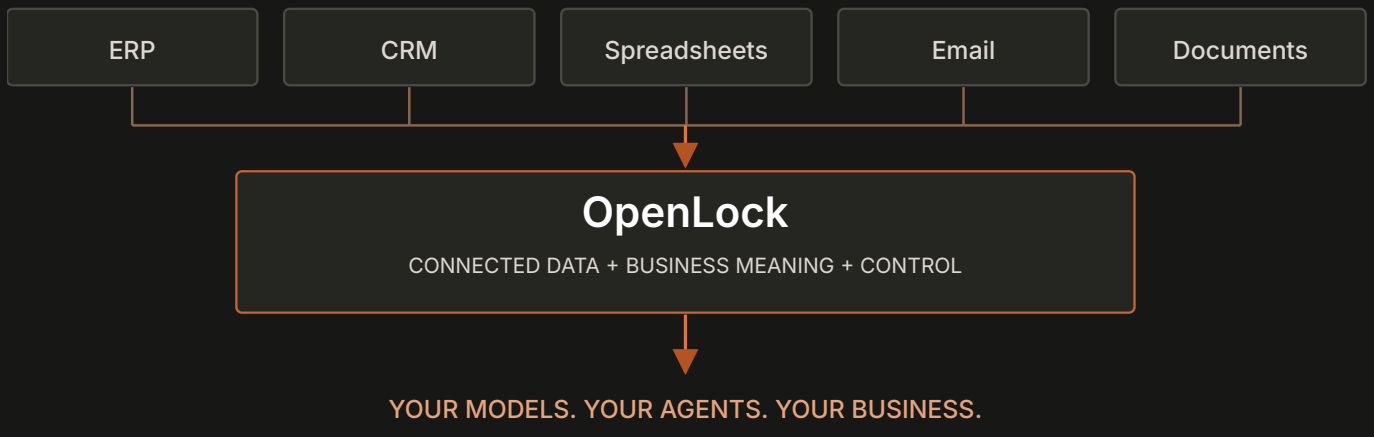
OPENLOCK
DATA SOVEREIGNTY

AI DATA READINESS & CUSTOMER SOLUTION GUIDE

Your data. Connected. Under your control.

The foundation for AI that understands your business.

OpenLock brings disconnected information into a governed data foundation, connects its business meaning, and prepares it for the models and agents you choose.



Connected information.
Independent intelligence.

Customer solution overview
September 2026 · openlock.ai

WHO WE ARE

Your business knowledge. A foundation built around it.

OpenLock is a data-and-AI engineering company developing a customer-controlled platform and managed service for one essential challenge: AI data readiness.

We bring together the business information that lives across enterprise systems, spreadsheets, emails, documents and operational databases. We help make that information consistent, connected and understandable, so your people and approved AI tools can use it with the right context.

Our work combines consultants who understand the business, engineers who connect and organize its systems, and internal developer agents that assist with interpreting data and proposing relationships. The result we are building toward is not simply a larger collection of files. It is a reusable foundation of data, business definitions and reviewed connections. [1–3]

OUR MISSION

Make disconnected business information connected, understandable and ready for AI—while keeping your data, business knowledge and choice of AI under your control.

A platform

A place for governed copies of business data, shared definitions, relationships and evidence—not a replacement for every system you already use.

A long-term partner

A team to help identify the right sources, implement the foundation and maintain it as your business, systems and AI needs evolve.

Our point of view: your competitive advantage should become more useful when you adopt AI, not less protected. OpenLock's role is to prepare and safeguard the business context; your organization chooses the intelligence that uses it.

This guide describes OpenLock's solution approach and intended capabilities. The platform is under development; integration coverage, production readiness and service commitments are confirmed for each engagement.

INSIDE THIS GUIDE

From scattered information to a usable business foundation.

Read it as a business guide first. The technical design matters, but its purpose is to make your information more useful, more trustworthy and more controllable.

> **Three questions to keep in mind:** What important question can your business not answer reliably today? Which disconnected sources would help answer it? What must remain under your organization’s control?

For a fast first read, start with the overview on page 2, the platform on page 6, the purchasing example on pages 10–11 and the sovereignty principles on page 14.

01 / THE AI DATA-READINESS PROBLEM

Your business is connected. Your systems often are not.

A customer order, the product it describes, the parts required to fulfill it and the promises made about delivery may all live in different places.

The people in your business bridge those gaps every day. Someone exports a report, looks up a product code, checks a spreadsheet and searches an email thread. They know which records belong together and which apparent matches are misleading. That knowledge often stays with the person doing the work rather than becoming a shared business asset.

An AI model does not automatically inherit those connections. A well-written answer can still rest on an outdated spreadsheet, the wrong customer record, a missing transaction or an incorrect interpretation of a field. OpenLock treats this readiness gap as a central risk to successful AI adoption—not as a problem solved simply by choosing a more capable model.

What the business experiences	What is missing underneath
Different answers to the same question	Agreed definitions and a clear source of authority.
Hours spent reconciling reports	Consistent identifiers, formats and cross-system relationships.
AI that cannot explain an answer	Traceable source records, calculation logic and context.
Automation that breaks when systems change	Ongoing monitoring, reviewed changes and reliable refreshes.
Concern about exposing sensitive knowledge	Defined access, approved model connections and accountable control.

THE PROBLEM OPENLOCK ADDRESSES

The information exists. The connections are missing.

Data readiness is not the only requirement for successful AI. Workflow design, adoption, oversight and execution still matter. OpenLock concentrates on the foundation those efforts depend on.

WHAT "READY" MEANS

Available data is not the same as usable data.

AI-ready data is information that an approved person or system can find, interpret, connect and use for a defined business purpose—with evidence and appropriate controls.

Readiness dimension	The practical question	What should demonstrate it
Accessible	Can we obtain the relevant information?	Approved source access and a repeatable connection.
Consistent	Do dates, quantities, codes and units mean the same thing?	Documented formats, transformations and business definitions.
Connected	Do we know how records relate across systems?	Reviewed customer, product, asset and transaction relationships.
Fit for purpose	Is it complete and accurate enough for this decision?	Reconciliation to known reports and explicit handling of gaps.
Current	How recent is the information we are using?	Visible refresh times and an agreed freshness requirement.
Governed	Who or what may use each part of it?	Enforced permissions, approved uses and a named owner.
Traceable	Can we explain where an answer came from?	Source evidence, mapping history and reproducible calculations.

Ready for a purpose

A monthly planning question may tolerate yesterday's inventory. An immediate fulfillment decision may not. Readiness is tested against the intended decision, not a generic label.

Improved in stages

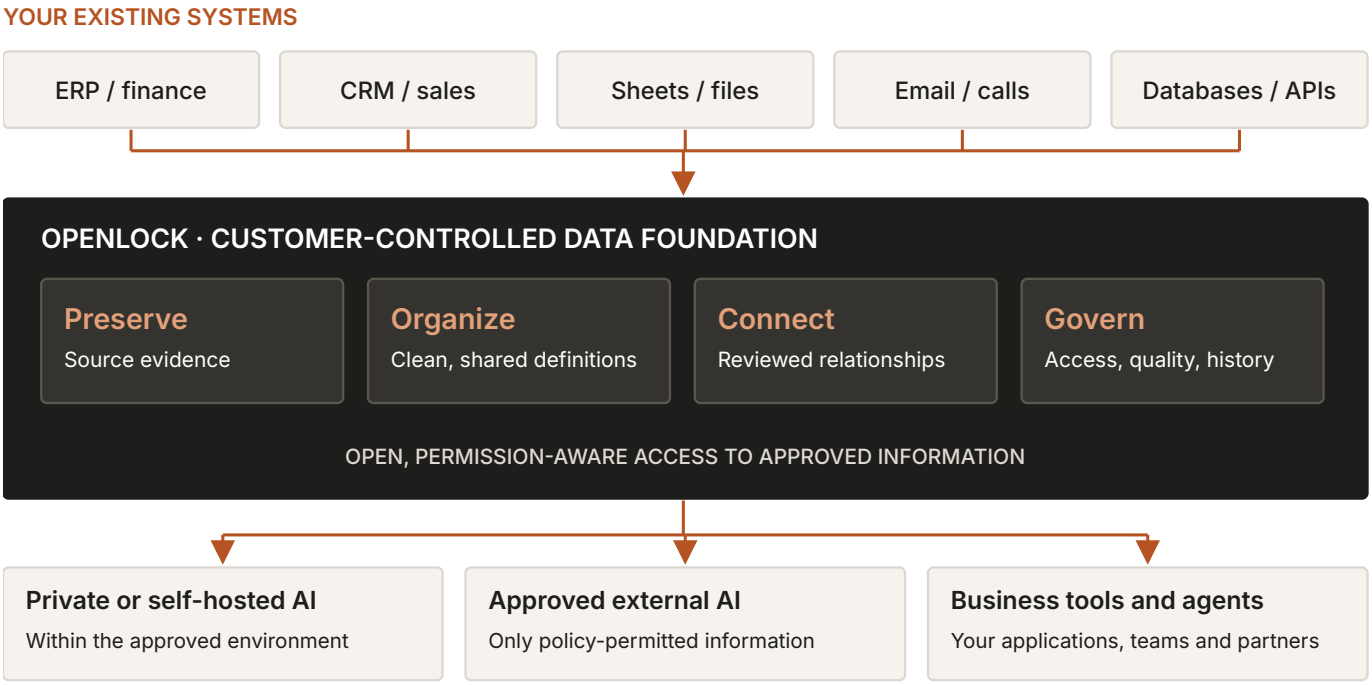
You do not need perfect enterprise-wide data before starting. A focused question can expose the specific gaps worth fixing first.

Readiness is an operating condition, not a one-time cleanup exercise.

02 / HOW OPENLOCK FITS

One governed foundation. Your choice of AI.

OpenLock sits between your existing systems and the people, models and applications that need a reliable view across them.



Conceptual architecture. Sources, services and downstream connections are selected and validated for each engagement. [2, 3]

Your source systems keep their jobs.

The ERP can remain authoritative for orders and inventory; the CRM can remain the sales team's working system. OpenLock begins with approved, read-only copying rather than rewriting those systems.

One platform does not mean one giant file.

Structured records, documents and their relationships may need different storage methods. OpenLock's purpose is one governed way to work with that information together.

> **The distinction:** storing data together makes it accessible. Preserving meaning, relationships, permissions and source evidence makes it useful.

Customers should not have to rebuild their business definitions every time they change an AI provider. The foundation is designed to preserve those definitions independently of any one model.

WHAT WE CONNECT

Start with the question. Connect the data it needs.

OpenLock's scope is broader than any one application category. The starting point is the information your business needs—not a requirement to copy everything.

Source family	Examples of information	Why the context matters
ERP and financial systems	Sales orders, invoices, inventory, purchase orders, product masters, bills of materials.	Shows what was ordered, made, stocked, billed or purchased.
CRM and commercial systems	Accounts, contacts, opportunities, quotes and activity history.	Connects sales intent to customers, products and actual transactions.
Excel and Google Sheets	Forecasts, planning workbooks, product crosswalks and team-maintained lists.	Captures operating logic and exceptions that may not exist in core systems.
Email and communications	Email threads, attachments, phone metadata, approved recordings and transcripts.	Adds commitments, explanations, complaints and relationship context.
Documents and repositories	Contracts, specifications, procedures, service records and technical files.	Connects written knowledge with the records and decisions it explains.
Operational data and metadata	Databases, application interfaces, asset records, timestamps, ownership and authorized external data.	Adds identifiers, events, source history and relevant enrichment.

Scope is approved before ingestion. We identify a source owner, the records needed, sensitive fields, connection rights, expected update frequency and retention requirements. Communications and third-party information are included only within an authorized scope.

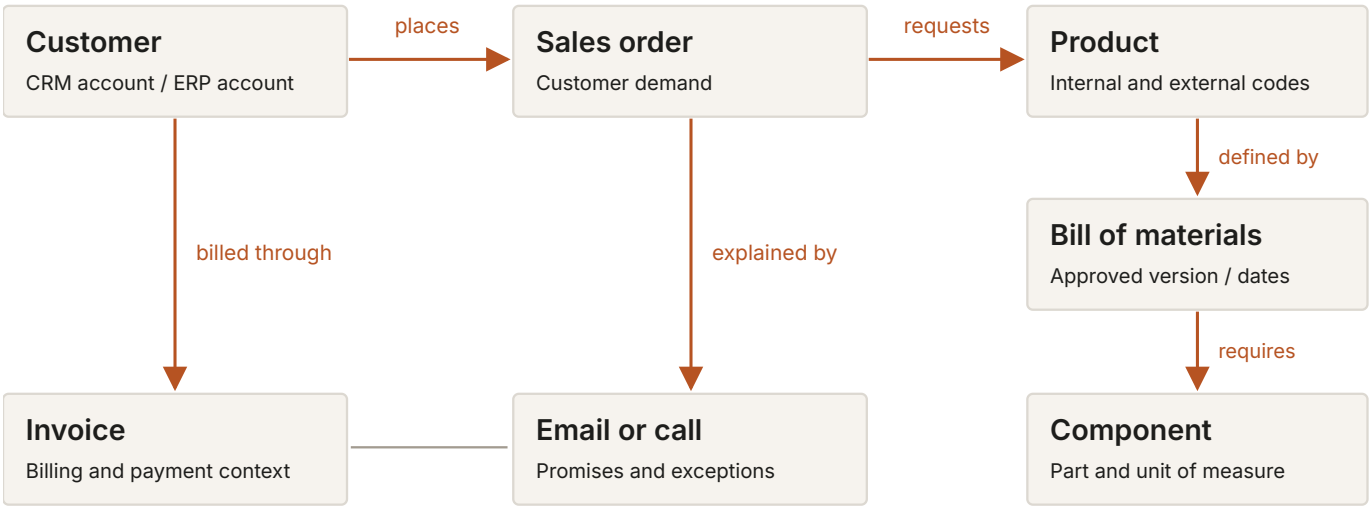
These are source categories, not a claim that every product has a ready-made connector. Vendor access, licensing, data quality and integration complexity are assessed during discovery; specialized sources may require custom engineering.

Connect enough to solve a meaningful problem.
Expand when the next connection earns its place.

WHERE THE VALUE IS CREATED

The missing piece is often the relationship between records.

The same customer may have different identifiers in sales and accounting. A product description may not match its manufacturing code. An email may explain an exception that neither system records.



Illustrative business relationships. “Is the same entity as” and “is related to” are different decisions: a branch, its parent company and an invoice should not be merged into one record.

Identify what each record represents.

A “customer” might mean a legal buying entity, a billing account or a delivery location. OpenLock’s design makes those meanings explicit before relying on cross-system matches.

Connect records with evidence.

Identifiers, source records and approved rules support a relationship. A similar name or shared telephone number can suggest a match; it does not prove one.

Business meaning also includes units, currencies, document versions, effective dates and the source that has authority over a fact. A current bill of materials cannot automatically describe an order built under an older product revision.

> **“Data that understands itself” means this in practice:** information is accompanied by explicit definitions, reviewed relationships and evidence—not an AI model silently deciding what is true.

THE INTERNAL DEVELOPER AGENTS

AI helps map the business. People approve what it means.

OpenLock's internal Builder agents are designed to help consultants, engineers and business data owners discover, explain and maintain connections—not to become an unreviewed authority over your records.

01 **Profile** → 02 **Propose** → 03 **Test** → 04 **Approve** → 05 **Apply**

The Builder can inspect approved metadata and bounded samples, identify patterns, ask clarifying questions, draft mappings and propose tests. Conventional software performs extraction, calculations, validation and the application of approved changes. [2, 3]

ILLUSTRATIVE WORKING CONVERSATION

Builder: "These two records share a phone number. Are they the same customer?"

Business owner: "No. They are separate branches. Group receivables by the billing account, but keep delivery locations separate."

Proposed result: a billing-account rule, a separate branch relationship, a preview of affected records and a test that prevents the two branches from being merged.

Corrections become business knowledge

Approved definitions, mappings, rejected matches and tests are stored as versioned records. They remain available when a model is replaced or a new engineer joins the project.

Uncertainty remains visible

Ambiguous links are held for review. A suggestion, a tested rule and an approved relationship have different statuses and should be presented that way.

This is not a claim that a base model continuously retrains itself on every conversation. OpenLock's enduring knowledge is the approved interpretation of your business data, preserved outside the model's weights.

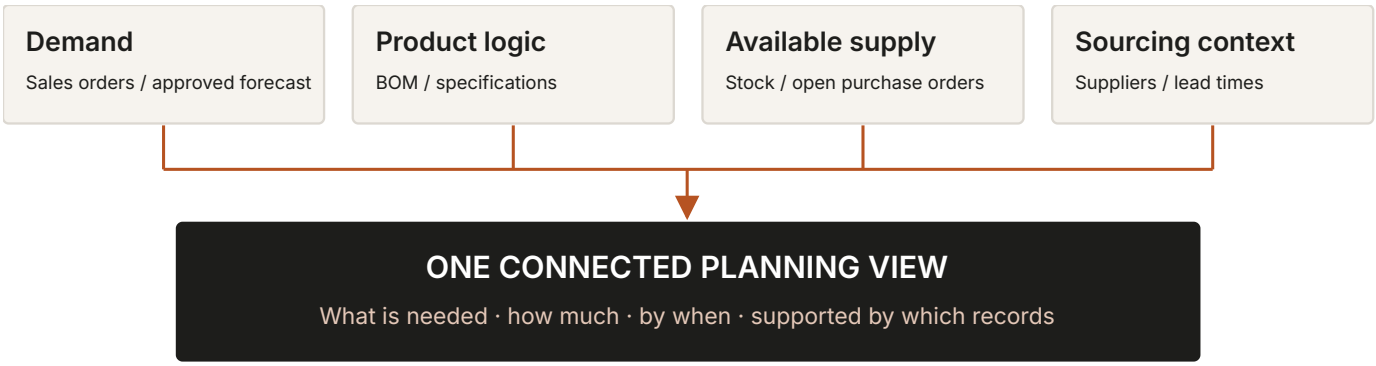
Internal agents build and maintain the foundation.
Your chosen business agents use the approved foundation.

03 / A CONNECTED-DATA EXAMPLE

From customer demand to purchasing clarity.

"What parts and items do we need to source to fulfill our customers' sales-order demand for the next year?"

It is a straightforward business question with a cross-system answer. Sales may know the demand. The ERP may hold product definitions and inventory. Purchasing may have open orders and supplier commitments. A planning spreadsheet may hold assumptions that change the calculation.



Illustrative use case developed from OpenLock's customer scenario. It describes a potential workflow, not a completed client deployment.

First, establish demand.

Agree whether the analysis includes confirmed orders, an approved forecast or both. Avoid counting the same demand twice. Align customer product references with the internal products and delivery periods.

Then, translate products into parts.

Use the applicable bill of materials, revision and unit of measure to calculate component requirements. Where necessary, include assemblies, yield assumptions and approved substitutes.

Next, account for available supply.

Subtract usable, uncommitted stock and eligible incoming supply. Distinguish reserved, damaged or late-arriving material from supply that can actually cover the demand.

Finally, make the result actionable.

Present the gaps by part and required date, alongside supplier context and the records behind the calculation. A planning application or business agent can use those governed inputs.

> **OpenLock's contribution:** the connected, explainable data needed for the answer. Purchasing decisions and order placement remain within the customer's approved workflow.

ILLUSTRATIVE WORKED EXAMPLE

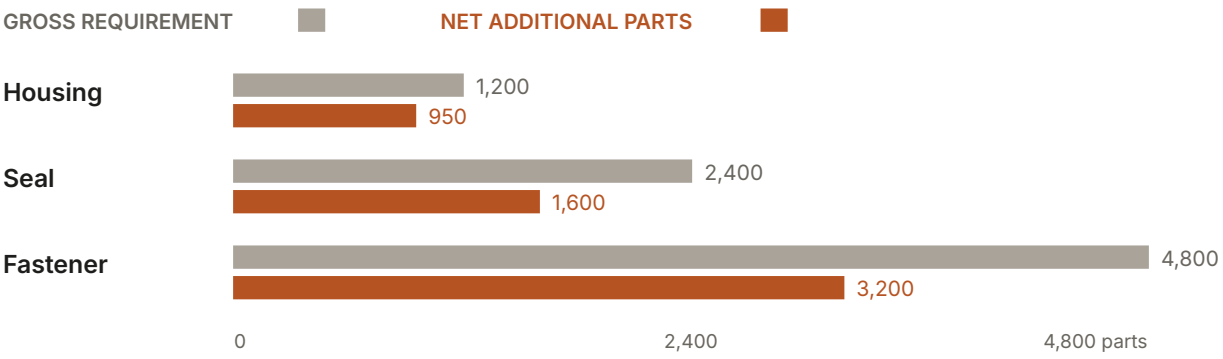
A sourcing answer you can inspect and verify.

Assume 1,200 finished kits must be produced to satisfy confirmed demand. Each kit requires one housing, two seals and four fasteners.

All figures on this page are hypothetical. There is no finished-goods stock, safety-stock requirement, scrap or yield loss in this simplified example. One approved bill-of-materials version applies. Inventory is usable and uncommitted; incoming parts are assumed to arrive in time.

Component	Per kit	Gross need	Available stock	Eligible receipts	Net to source
Housing	1	1,200	150	100	950
Seal	2	2,400	300	500	1,600
Fastener	4	4,800	600	1,000	3,200

> **Gross need** = kits to produce × parts required per kit.
> **Net to source** = max(0, gross need − eligible stock − eligible incoming supply).



Illustrative part counts, not customer results. Bars compare gross demand with additional parts to source after the stated inventory and receipt assumptions.

A useful answer should show the demand records, the approved product definition, the stock snapshot, the included purchase orders and the calculation. An LLM can explain the answer; the quantities should come from reproducible calculations, not estimates generated in prose.

An annual total is not a purchasing schedule. A production analysis must also allocate supply by period, consider lead times and validate revisions, reservations, substitutions and shortages. A receipt in December cannot cover a requirement in March.

BEYOND A SINGLE WORKFLOW

Different business questions. The same connected foundation.

Once relevant records share definitions and relationships, the foundation can support more than one team. Each additional use case still needs its own data and acceptance checks.

COMMERCIAL TEAMS

Customer and revenue context

Question: Which active opportunities involve customers with overdue balances or recent service complaints?

Connect: CRM, invoices, payments and approved communications.

Potential value: better-informed follow-up and escalation.

FINANCE AND OPERATIONS

Product and margin visibility

Question: How do selling prices, returns and agreed cost definitions change the picture by product or customer?

Connect: sales, credits, product records and relevant costs.

Potential value: less reconciliation and clearer decisions.

SERVICE TEAMS

Service and asset history

Question: What do we know about this asset, its past work and the parts or commitments associated with it?

Connect: asset records, work orders, parts and correspondence.

Potential value: faster preparation and fewer missing details.

COMPANY-WIDE KNOWLEDGE

Knowledge tied to real work

Question: Which specification, contract or procedure applies to this customer, product or transaction?

Connect: document repositories and operational identifiers.

Potential value: answers grounded in the applicable evidence.

These are illustrative opportunities, not a claim of installed products, proven savings or autonomous decision-making. OpenLock focuses on the shared data layer; customer-facing applications and specialized business agents can be delivered by your team, your chosen partner or a separately scoped engagement.

Build a foundation that can serve **the next business question,**
not only the first demonstration.

WHAT CHANGES FOR THE CUSTOMER

Less time assembling the facts. More time using them.

OpenLock's intended value is operational as well as technical: fewer disconnected interpretations, more reusable business context and a stronger basis for responsible AI use.

From	Toward	How to assess the value
Repeated manual exports and reconciliation	A maintained view across approved sources.	Time required to assemble and verify the answer.
Different definitions in different teams	Shared definitions with named owners and recorded exceptions.	Reconciliation failures and time spent resolving disagreements.
AI answers detached from evidence	Responses grounded in permitted records and reproducible calculations.	Accuracy against an agreed test set and evidence coverage.
Knowledge held in one employee's memory	Documented rules and relationships that other teams can reuse.	Time to onboard a source, user or new use case.
A data rebuild for each new AI tool	A foundation exposed through governed, model-neutral interfaces.	Integration effort and tests required to change downstream tools.
Unclear responsibility after launch	An agreed operating model for monitoring, changes and recovery.	Issue visibility, restoration tests and adherence to service commitments.

A durable business asset

The valuable output is not just a working connection. It is the source history, business glossary, relationship rules, tests and operating knowledge your organization can continue to use.

A more deliberate AI investment

Start with a result worth measuring. Establish a baseline, validate the inputs and assess the workflow. Data readiness supports business value; it does not guarantee it.

> **Reuse can improve the economics:** a customer or product definition established for one workflow may help another. The benefit depends on how much useful data and meaning the workflows share.

04 / OUR DEFINING PRINCIPLES

Your data.
Your choice of intelligence.

Data sovereignty and agentic sovereignty are complementary: control the business information and retain the freedom to choose what uses it.

CONTROL THE FOUNDATION

Data sovereignty

Your organization decides where the foundation is deployed, who may access it, which information may leave it and how it is retained or removed.

The design preserves business definitions, relationship decisions and source evidence independently of any single model.

Ownership, administrative control, exports and transition responsibilities must be clear in the engagement.

CHOOSE WHAT USES IT

Agentic sovereignty

Your organization chooses the models, agents and applications that consume approved data: open-source, open-weight, closed-source, internally developed or third-party.

The internal model helping organize the data does not dictate the model serving your business users.

Open interfaces support choice; each connection still requires permission and capability validation.

THE PRINCIPLE

Your knowledge. Your choice.

Private processing and external processing are different choices. In a private deployment, model work can be kept within the approved environment. When you authorize a hosted external model, the selected information is sent outside that environment for processing. That transfer must be explicit, limited and consistent with your policies. [2, 3]

Provider processing, retention, logging and training terms must be reviewed for the chosen connection. “Model-agnostic” does not mean every model behaves identically, supports every feature or is automatically approved to receive all your data.

Your data remains the asset.
The model is a tool you choose—not the owner of your business context.

PROTECT THE COMPETITIVE ADVANTAGE

Make control visible in the design.

Sensitive knowledge should not become broadly accessible just because it has been connected. OpenLock's approach makes access, disclosure and change control part of the foundation.

Design safeguard	What it means for the customer
A separate customer boundary	Customer data and configuration are kept within the approved customer environment; reusable software is not a shared pool of customer records.
Permissions before retrieval	Access is checked before information enters an AI model's context. Joined records and derived answers must respect the relevant underlying permissions.
Protected storage and connections	Encryption, credential handling, administrative access and key responsibilities are defined for the deployment—not left to an AI prompt.
Controlled model disclosure	Only approved, necessary information is released to a permitted model or tool. Credentials are not provided to the model as business context.
Reviewable changes and evidence	Meaningful mapping changes require validation and approval. Source history and change records help explain what happened and who authorized it.
Retention and recovery by policy	Source copies, derived records, search indexes and backups are addressed in the retention, deletion and recovery design.

Business content is data, not authority. An instruction embedded in an email, attachment or transcript must not be allowed to approve a mapping, change access or trigger unrestricted actions. Internal agents operate within constrained tools and approval boundaries. [3]

> **Security must be demonstrated.** Each deployment needs access tests, recovery evidence, a support-access policy and agreed responsibilities. No platform removes every risk, and this guide is not a claim of a certification or a guaranteed compliance outcome.

Sovereignty is not only about a server's location. It also concerns who can administer it, where backups and logs go, what external tools receive and how your organization can take over or transition the service.

DEPLOYMENT AND OWNERSHIP

Your environment. An agreed operating model.

The intended deployment model is a customer-controlled foundation, sized and qualified for the actual workload rather than a one-size-fits-all infrastructure promise.

CUSTOMER CLOUD

Your cloud account

A dedicated environment in an approved customer cloud account. Control, region, access and operating responsibilities are agreed with your team.

PRIVATE HOSTING

A dedicated private environment

A separately governed hosting arrangement operated with your explicit authorization. Administrative access and data-transfer boundaries remain defined.

ON PREMISES

Qualified local infrastructure

An on-premises or appliance deployment where the hardware, model runtime, storage, support access and recovery design have been qualified.

The current engineering sequence is AWS-first, with local-appliance qualification planned separately. These are deployment directions, not a claim that every cloud or hardware configuration is already supported. A single-node prototype is not a high-availability production service. [2, 3]

Your organization defines	OpenLock's delivery role
Business priorities, source authority and approved uses.	Translate those decisions into connections, definitions, tests and controls.
Allowed environments, users, model providers and data disclosure.	Implement and validate the agreed deployment and access configuration.
Recovery needs, retention, change approval and risk ownership.	Establish operating procedures, monitoring, recovery tests and escalation.
Required exports and transition expectations.	Document how data, definitions and agreed configuration are handed over.

> **Managed does not mean surrendered.** Data ownership, administrative access, platform licensing, third-party rights and exit provisions are documented in the engagement.

Availability, capacity, refresh rates and recovery commitments depend on the selected architecture, workload and service agreement. They are established through testing and commercial scope—not implied by the word "platform."

05 / THE CUSTOMER JOURNEY

From the first question to an operating foundation.

OpenLock's engagement approach combines implementation with continued operation. Discovery is not disconnected from engineering, and go-live is not the end of the work.

01 **Identify the business problem**

Select a small set of valuable questions. Name the decision owner and define how a correct answer and useful business result will be recognized.

02 **Assemble the necessary data**

Inventory the relevant sources, confirm authority and access, establish boundaries, and connect an approved starting scope.

03 **Govern, standardize and connect**

Preserve source evidence, define shared meanings, review relationships and reconcile the resulting data against known records.

04 **Enable the approved AI workflow**

Expose governed information to the selected model, agent or application. Test the answer, permissions and handoff to the business process.

05 **Operate the foundation**

Monitor refreshes, failures, data quality, access, storage and recovery under the agreed operating responsibilities.

06 **Support and iterate**

Review business changes, repair or extend connections, update definitions through approval and add the next justified use case.

The lifecycle builds on the company's implementation-and-support model, with the current focus on the data foundation and customer-selected AI. Specialized front-line agents and applications are scoped separately when needed. [1–3]

Start with a bounded outcome.
Prove it, operate it and expand deliberately.

WHAT YOUR TEAM RECEIVES

A working foundation and the knowledge behind it.

An implementation should leave more than code behind. The deliverables should explain what is connected, what it means, how it is controlled and how it will be maintained.

01

A source and readiness register

The information in scope, its owners, access method, refresh needs, sensitive fields, known gaps and source-of-record responsibilities.

02

An integrated data environment

Approved copies of the selected records, repeatable ingestion, preserved source evidence and the configuration needed to operate the foundation.

03

A business glossary and relationship model

Definitions, source crosswalks, approved links, exceptions and the rules that explain how the business information fits together.

04

A validation and acceptance pack

Agreed questions, expected answers, reconciliation checks, permission tests and a record of unresolved items or limitations.

05

Governed access for chosen tools

The agreed interfaces and evidence packages that let authorized models, agents, analytics and applications use the foundation.

06

Operational visibility

A scoped Console experience for source health, data previews, mapping approvals, relationship review, audit and recovery status.

07

An operating and change plan

Monitoring responsibilities, escalation paths, approved change procedures, backup and restoration methods, and a prioritized improvement backlog.

08

A handover and transition record

Documentation and agreed exports of data, definitions and configuration, with the responsibilities needed for continuity or transition.

Your statement of work identifies the exact deliverables, supported sources, interface capabilities, production gates and acceptance owner for the engagement.

> **Consultants clarify the business.** Engineers implement the system. Internal agents assist with discovery and mapping. Your business owners validate the meaning and intended use.

MANAGED DATAOPS

Your business changes. The foundation must keep up.

Managed DataOps means the ongoing work of keeping connected data usable, current and governed as sources, definitions and business needs evolve.

An integration can stop being useful without obviously stopping. A source adds a field, a product code changes, a department changes its definition of “active,” or a user’s permissions are removed. OpenLock’s operating approach treats these changes as part of the service—not as an afterthought. [2, 3]

What needs attention	The operating response
A refresh fails or data becomes stale	Detect the issue, show freshness, triage the cause and restore or replay ingestion within the agreed scope.
A source changes structure or meaning	Identify drift, hold affected transformations when necessary and review a new mapping before promotion.
Records disagree or relationships become ambiguous	Reconcile the data, surface exceptions and route unresolved interpretations to a named owner.
Access or retention requirements change	Apply approved changes to access, copied records, derived information and retention procedures.
Software, models or workload change	Test upgrades, monitor capacity and revalidate the relevant answer and policy checks.
Recovery must be possible	Maintain the agreed backup process and test that the data, definitions and configuration can be restored.

Operate what has been accepted.

The support agreement defines covered sources, monitoring, response expectations, routine maintenance and escalation. New integrations or major application changes may require additional scope.

Improve through a controlled backlog.

Repeated exceptions become candidates for better rules. New questions become candidates for additional sources. Business owners approve meaning and exposure changes.

The recurring service protects the foundation’s usefulness,
not merely the uptime of a server.

HOW WE PROVE READINESS

A convincing answer is not enough.

A successful demonstration should be explainable and repeatable. It should also show what happens when information is wrong, incomplete, stale or restricted.

Acceptance question	Evidence to require
Did the right data arrive?	Compare source records, totals, update times and ingestion history with the approved scope.
Are the relationships correct?	Test known matches, known non-matches, parent/branch distinctions and ambiguous cases. Unresolved is an acceptable status.
Do the answers reconcile?	Compare calculations with agreed source reports or expected results; retain the underlying records and applied rules.
Are permissions actually enforced?	Test different authorized roles and verify that restricted information is excluded before retrieval and from derived answers.
Does the system behave safely when conditions change?	Test stale sources, changed fields, failed jobs, duplicate deliveries, deleted records and misleading instructions in source content.
Can the foundation recover and continue?	Restore a consistent backup, check the recovered data and configuration, and retest the agreed business questions.

Portability needs evidence too. Where model switching is in scope, validate the replacement against the same permitted information and expected outputs. Where repeatable deployment is in scope, prove a clean installation without copying another customer's records or secrets. [3]

> **Agree the acceptance gates before implementation:** the question, the authoritative sources, the owner who validates the answer, the freshness requirement, the access boundaries and the exceptions that block use.

A polished interface, a running container or an AI-generated answer is not by itself evidence of a production-ready service. The delivery record should distinguish demonstrated capabilities from remaining work.

MEASURE THE RESULT

Measure readiness. Then measure business value.

Use two scorecards: one for whether the foundation can be trusted for the selected task, and another for whether the workflow improves a meaningful business result.

Foundation measure	How to define it for the engagement
Source coverage	Approved required sources connected and validated ÷ required sources in the agreed starting scope.
Relationship validation	Accuracy on a reviewed set of matches and non-matches, alongside the number and age of unresolved cases.
Reconciliation	Records, totals and expected answers that pass the agreed checks, with tolerance and exceptions stated.
Freshness	Relevant datasets meeting their defined freshness targets over the measured period.
Access and recovery	Results of required permission and restoration tests; failures must remain visible rather than averaged away.

Business measures

Time to assemble and verify an answer; repeated manual steps; exception-resolution time; preparation effort; and the decision or service result the workflow is intended to improve.

Measurement discipline

Record the baseline before changing the process. Compare the same task, scope and quality standard afterward. Include engineering, operation and review effort in the assessment.

A useful capacity formula:

Annual time released = occurrences per year × verified reduction in effort per occurrence.

Time released is potential capacity—not automatically cash savings, additional revenue or eliminated payroll.

Targets are selected with your team. This guide does not invent a customer baseline, promise a savings percentage or assume that improving a technical metric alone creates a financial return. Where other changes affect the outcome, separate them from OpenLock's contribution.

06 / COMMON QUESTIONS

Clear expectations. A stronger partnership.

The foundation should make AI adoption easier to govern—not leave the customer guessing about scope, control or responsibility.

Does OpenLock replace our ERP, CRM or existing warehouse?

Not as the default approach. Existing systems retain their operating roles and source authority. OpenLock connects and organizes approved data across them. Existing data infrastructure can be assessed for reuse rather than replaced automatically.

Do we need to integrate all our data before getting value?

No. Start with a defined business question and the minimum useful set of sources. Add data when it improves the answer or supports the next justified use case. Known gaps should be visible, not disguised.

Does OpenLock build the business agents too?

The core focus is the data foundation and its internal building, governance and access tools. Specialized sales, purchasing, service or other front-line agents can come from your team or partners, or be separately scoped.

Will the system change our production records on its own?

The starting design uses read-only ingestion. Internal agents do not have unrestricted authority to write back to source systems. Transactional actions require a separately designed, authorized and tested workflow.

Can we change AI models or keep processing private?

That is a central design objective. Approved business definitions and data access are kept independent of one model. Private processing requires a qualified deployment; external connections require explicit approval and compatibility testing.

What happens when the data cannot support an answer?

The system should expose the missing source, ambiguous link, stale information or failed check. The correct outcome may be a qualified answer or a request for review—not a confident response unsupported by the records.

Is this a turnkey product with fixed timing and pricing?

This guide describes a platform and services approach under development, not a universal packaged deployment. Scope, pricing, timing, supported integrations, availability and acceptance criteria are established in the engagement.

BEGIN WITH A REAL BUSINESS QUESTION

What should your business be able to answer?

The best starting point is a decision that matters, depends on disconnected information and has an owner willing to validate the result.

OpenLock is designed around the needs of middle-market and operationally complex businesses: organizations with meaningful data across multiple systems, practical AI ambitions and a reason to preserve control over their information. Complexity and business value matter more than the number of applications alone.

A PRODUCTIVE FIRST CONVERSATION

“Here is the question we struggle to answer. Here is where the information lives. Here is what a useful result would change.”

Bring the business context.

- ☐ One to three valuable questions or workflows.
- ☐ The people who own the decision and understand the current process.
- ☐ The reports, calculations or examples that demonstrate a correct answer.

Bring the boundaries.

- ☐ The systems and information likely to be relevant.
- ☐ Sensitive data, approved environments and restrictions on model use.
- ☐ Your timing, operating needs and criteria for continuing beyond the first phase.

The next step is a scoped readiness and discovery engagement: identify the required sources, expose the critical gaps, establish the first acceptance tests and shape an implementation plan. It should produce a clear decision about what to build—not a demand to integrate the entire enterprise at once.

Your data. Your advantage.
Let’s make it ready for what comes next.

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TERMS AND SCOPE

A shared language for the work ahead.

AI data readiness	The condition in which approved data is usable for a defined AI task, with the needed context, quality, freshness and controls.
Data foundation	The connected stores, definitions, relationships, access rules and operating processes that make business information reusable.
Business meaning	What a field, record, identifier or relationship means in your organization—not simply its technical format.
Entity resolution	Determining whether records refer to the same person, business, product or asset; distinct relationships are recorded separately.
Source authority	The system or owner whose information is authoritative for a particular fact or definition.
Lineage / provenance	The record of where information came from and how it was transformed, linked or used in an answer.
Builder agent	An internal assistant that helps profile data, ask questions and propose mappings or tests within approved boundaries.
Governed interfaces	Controlled ways for approved tools to request information, such as APIs or Model Context Protocol (MCP) connections.
Managed DataOps	Ongoing monitoring, maintenance, review and improvement of the connected data foundation.

Continue with OpenLock guides and resources:

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