

How a Decision-Basis Review is activated

The information boundary before any live confidential record is shared.

PURPOSE

This note answers first-stage authority, scope, material-route and review-path questions. It is not a certification of legal, security, privacy, insurance or procurement compliance; matter-specific requirements are confirmed before binding acceptance.

1. Written activation route

Non-sensitive fit check	A short background, proposed decision/reliance question, main record families, accountable owner, cut-off and intended use.
Authority and ownership	The organisation confirms who may commission the work, provide material, clarify facts, accept the output and define its permitted use.
Scope and documentary boundary	One written scope identifies the question, period, agreed core record set, exclusions, fee, timing, dependencies and review route.
Material route approval	No live confidential records enter RGRA custody until the approved channel, storage, access, retention and incident route are confirmed.
Review and release	The File-Position Note is released only through the agreed client/partner review path and only for the stated audience and use.

2. Commercial and professional controls

- Fixed scope and fixed fee are confirmed in writing. The initial live-work target is 7–10 business days and begins only after written scope acceptance, material acceptance and confirmation that the agreed review route is operational.
- A hard material, authority or permitted-use blocker may produce a bounded insufficiency outcome or clean stop rather than a forced conclusion.
- The client remains responsible for the underlying decision and for legal, technical, commercial, operational, assurance or expert judgement.
- Where downstream use requires a licensed or authorised specialist, the review path is agreed before release; RGRA does not silently assume that mandate.
- Use outside the agreed audience, decision, cut-off or purpose requires written reconsideration.

Confidentiality, tools and material handling

The matter-specific route is confirmed before intake—not assumed from a generic platform claim.

3. Material handling principles

No live files at first contact	LinkedIn and ordinary outreach are limited to non-sensitive background. Client material is not requested there.
Approved route only	The live matter uses a client-approved portal, business account or approved encrypted transfer route with named access.
Need-to-know access	Access is limited to the Founder and any expressly approved reviewer or service required for the matter.
Retention and closure	Return, deletion, legal hold or retained records are addressed in the engagement terms and closure record.
Incident route	The internal and client escalation route is established before intake.
Jurisdiction and client restrictions	Storage location, cross-border transfer, localisation and client-policy requirements are checked for the actual matter.
AI-enabled tools	No client material is entered into a personal or uncontrolled AI service. Any approved business-tool use requires matter-specific authority, provider/route assessment, source verification and Founder review. AI output is never treated as source authority.
No blanket compliance claim	A public note cannot establish that every client, jurisdiction or information class is permitted. Unknown conditions trigger a hold, not an assumption.

4. What may be requested at due-diligence stage

- Proposed engagement terms, NDA position, permitted-use wording and liability/exclusion route.
- Legal and invoicing identity, tax/VAT and purchase-order requirements for the live opportunity.
- Matter-specific transfer, storage, access, retention and deletion plan.
- Current insurance position and any client-required cover before work begins.
- Named external reviewer or specialist route where the intended use requires it.
- Security evidence appropriate to the actual device, account and approved business-tool configuration before confidential intake.

FIRST SAFE STEP

Send only a non-sensitive written background. RGRA will identify the information needed to assess fit and the controls that must be confirmed before any live file is requested.

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