Clean Source Data

CLIENT GUIDE 2 OF 4

Getting Ready to License Your Data

A short, non-technical guide to sizing your data before your discovery call, so we can skip the basics and get to specifics.

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Clean Source Data

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Getting Ready: Data Readiness Guide

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Getting Ready: Data Readiness Guide

Skim this before your call. The more precise your answers, the faster and more accurate your offer.

01 What Are AI Buyers Looking For?

Think about how your team works, not what you sell. Buyers want the real, everyday record of how your people get things done.

USUALLY MOST VALUABLE	USUALLY REMOVED, TRANSFORMED OR EXCLUDED
Calls, emails and chat between your team and customers	Names, phone numbers, emails and addresses (removed or replaced on-site)
Internal documents: SOPs, checklists, reports, spreadsheets	Attorney-client privileged material
How your team uses its systems: CRM, scheduling, dispatch, ticketing	Payment card and bank account numbers
Decision trails: approvals, revisions and how choices get made	Passwords, API keys and other credentials
Structured records and databases	Biometric data, and data about minors unless cleared case by case
Call recordings and transcripts, where consent is in place	Content licensed from third parties
Industry-specific operational records and images	Anything covered by a contract that limits its use

Health information is not automatically excluded: we de-identify it on-site to the HIPAA Safe Harbor standard, so it can often be licensed safely. Each buyer sets its own list of wanted and excluded data; your project lead confirms it for your deal.

02 How Much Data Do You Have? A Quick Self-Check

You do not need to be technical. Rough numbers are fine; exact numbers are better.

1. **Check your file storage.**
   Google Workspace: Admin console, Reports, Drive usage. Microsoft 365: Admin center, Reports, OneDrive and SharePoint usage. Note the total, usually in GB.

2 **Check email storage.**

Your Gmail or Outlook admin panel shows total mailbox size across all users.

3 **Check your phone system.**

Note whether calls are recorded, roughly how many per month, and how far back recordings go.

4 **Check your business software.**

Write down your CRM, scheduling, billing and industry software, rough record counts, and how many years each goes back.

5 **Ask IT if you have someone.**

A quick look at total folder size on a shared drive or server covers most of this.

6 **Only have a rough number? That is fine.**

Bring it and mark it as an estimate. We will confirm exact figures together while building your data inventory.

03 Bring These Answers to Your Call

QUESTION	YOUR ANSWER
Number of employees	
Years operating with digital records	
Total storage (GB or TB), exact if possible	
Where does your team's work happen? (phones, email, chat, CRM, scheduling, files, other)	
Main software you use, and how long you have used each	
Does any data include health, financial or other sensitive information?	
Anything to exclude upfront? (privileged, payment card, children's data)	
Any existing data licenses or contracts that limit how your data can be used?	
Who can approve a data license for your company?	

04 What Happens Next

- Bring your answers to the call. We will walk through the rest together, live.
- After you sign the Clean Source Data agreement, your project lead turns these answers into a data inventory: the document buyers use to make an offer.
- No raw data leaves your office, ever. Only a de-identified package you have approved is delivered, after you approve a buyer and terms in writing.
- Before accepting it, the buyer runs its own independent privacy review: a second layer of protection on top of ours.

Questions?

Your Clean Source project lead is your single point of contact.

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