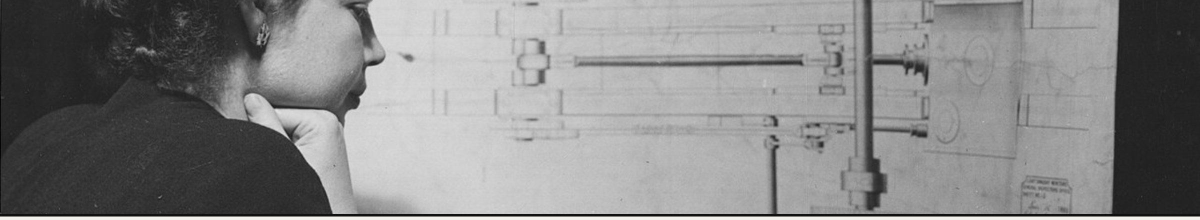

SEVEN DAYS IN ORGANIZATIONAL INTELLIGENCE

How organizations capture, govern and reuse what they know.

Old Company Records Find New Buyers

- CADDi raises $114 million to review old factory drawings
- Nvidia, Booz Allen and Palantir limit Anthropic's Fable over log retention
- Only 42% of financial advisors have a formal succession plan
- Micro1 says it closed 50 data deals in 45 days

ISSUE 6 - SEPTEMBER 17, 2026

SWIPE TO READ >

02 IN THIS ISSUE

Factory Drawings, Retention Terms, Succession Plans

In a cluster analysis of hundreds of articles, about hundreds of organizations, these are the key developments and themes emerging.

Powered by Hawkeye; analyzed by Claude, checked with ChatGPT, and human editorial oversight.

Knowledge that used to sit in experts' heads and in storage picked up prices, protections and handoff plans this week. CADDi, Iron Mountain and Micro1 each put figures on records companies already hold, large AI buyers kept their own code away from a model whose maker retains logs, and a survey found most financial advisors have no formal plan for handing on their clients.

COVER IMAGE: FRANCES BENEDICT VIEWING AN ENGINEERING DRAWING OF THE MONITOR CHIMO - U.S. NATIONAL ARCHIVES / WIKIMEDIA COMMONS (PUBLIC DOMAIN)

1 NEWS BRIEFS KEEPING THE RECORD

Factory Drawings, Retention Terms, Succession Plans

Euno's $23 million round, legal holds in Nextcloud, and a shipping audit that keeps the whole record.

2 COVER STORY RECORDS GET A PRICE

CADDi, Iron Mountain and Micro1 Are Putting Prices on What Companies Already Keep

Searchable drawings, digitized boxes and workplace archives sold as training data.

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Nvidia, Booz Allen and Palantir Limit Anthropic's Fable Over How Long Logs Are Kept

Large buyers keep their code away from a vendor that retains logs.

4 FEATURE 2 WHEN THE ADVISOR RETIRES

Only 42% of Financial Advisors Have a Formal Succession Plan, Edward Jones Finds

Most advisors say succession matters; the client history often has no written plan.

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14 people on the records companies hold, keep and hand on.

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The Future of Organizational Intelligence

Three important dates coming up in this field.

03 BROUGHT TO YOU BY

BROUGHT TO YOU BY

Humanity Labs

Humanity Labs gives wealth management firms an AI Workforce that makes growth profitable. In a people-based business, serving more clients means hiring more people, so cost scales with revenue. The AI Workforce breaks that trap.

It works inside the systems your team already runs and delivers done work across the front, middle, and back office, while your people stay focused on the decisions that matter.

Every job it runs writes into one shared memory, building the firm's Organizational General Intelligence (OGI) so it gets smarter as it grows.

The result is the Firm of the Future: a firm that serves more clients and grows without adding cost at the same rate.

Humanity Labs works with some of the world's leading wealth management firms, which together oversee more than $750 billion in client assets, and is backed by leading venture firms including Google Ventures and Vestigo Ventures.

04 NEWS BRIEFS

IN THIS ISSUE

Factory Drawings, Retention Terms, Succession Plans

> "Every AI session today is that new hire, and most companies rebrief them from scratch every single session."
>
> - TRAVIS KASSAY, INSIGHT PARTNERS, SEP 16

Smaller items this week were about how companies keep and connect the records they already have: a startup mapping what company data means, legal holds in self-hosted software and a shipping audit that keeps the whole record.

MOST NOTABLE

Euno Raises $23 Million to Map What Company Data Means

Euno, a startup that builds what it calls a context platform for company data, closed a $23 million Series A led by N47 on September 9, bringing its total funding to $29 million. CEO Sarah Levy told PYMNTS on Monday that a typical enterprise runs 10 to 12 data platforms and business intelligence tools, and that Euno maps who uses which data, how figures are calculated and who owns them. The company says it does this 'without collecting or storing the underlying enterprise data itself.' Levy also said 'there is also a unique knowledge that is actually in people's minds,' which no data platform holds.

PYMNTS

ALSO NOTABLE

Shipium Keeps the Whole Shipment Record to Audit Freight Bills

Shipium, a Seattle shipping software company, has launched Always On Audit, which checks each shipment's cost as it happens instead of reconciling invoices weeks later, FreightWaves reported on Tuesday. Penny Allen, Shipium's senior vice president of AI product and engineering, said the product depends on one record per shipment that every step writes to, from rating to label printing. Because Shipium keeps that full record rather than only the invoice, the company says it can trace a billing error to the lane, station or operator where it started. CEO Jason Murray said people still handle the hardest exceptions, and the system reuses how they resolved them.

FREIGHTWAVES

ALSO NOTABLE

Nextcloud Adds Legal Holds and Retention Rules to Its Self-Hosted Workspace

Companies that run their own file servers can now set retention schedules inside software they host themselves. Nextcloud, the German maker of open-source collaboration software, released Hub 26 Summer on Wednesday with updates to Nextcloud Governance, its compliance app for large organizations. The app lets administrators set retention policies that 'Define how long data needs to remain available and when it should be deleted,' place legal holds that freeze files needed for an investigation, and apply sensitivity labels. Nextcloud says a coming Enterprise release will extend those controls to its other apps and add eDiscovery, the search and export of records for litigation.

NEXTCLOUD

COVER STORY

CADDi, Iron Mountain and Micro1 Are Putting Prices on What Companies Already Keep

Knowledge that used to sit in experts' heads and in storage rooms is being sold three ways: as searchable drawings, as digitized archives and as AI training data. Only what someone wrote down can be sold.

SOURCES: FORTUNE ON CADDI | CADDI RELEASE | MARKETBEAT ON IRON MOUNTAIN | FORTUNE ON MICRO1 | PYMNTS ON SQUINT | NISSAN TALK

QUICK TAKE

- CADDi's Series D values it at more than double the $470 million it reported in March 2025 (- Fortune, Sep 15)
- Iron Mountain says its digital solutions business now brings in more than $600 million a year, and it starts with material Iron Mountain already stores (- MarketBeat, Sep 14)

- Micro1 told the Spirit Airlines bankruptcy court it completed more than 50 data transactions in 45 days, naming no sellers, prices or buyers (- Fortune, Sep 14)
- SimpleClosure says its marketplace for company code and workplace data now takes listings from operating companies, not only those winding down (- SimpleClosure, Sep 3)

Three companies put figures this week on knowledge that businesses already hold. On Tuesday, Ellie Krupnick (Fortune) reported that investors including Woven Capital, Toyota's growth fund, and Salesforce Ventures had put $114 million into CADDi, a Tokyo- and Chicago-based company whose software searches a manufacturer's own drawings, purchase records and defect histories, at a $1.2 billion valuation. (Fortune, Sep 15)

What's new: Companies have long treated old drawings, stored boxes and chat archives as a storage cost, and expertise as something that leaves when people do. This week an investor round, a storage company and a data buyer each priced that material as an asset. For a company, the question moves from whether it has the knowledge to whether the knowledge is written down in a form software can search, sell or hand on.

By the numbers: Iron Mountain, the records storage company, told investors at a Goldman Sachs conference last week that digitization projects can begin with physical material it already stores for its 245,000 business customers, then move onto its DXP software platform. Chief Financial Officer Barry Hytinen said the digital business grew 20% in the most recent quarter. (MarketBeat, Sep 14)

Between the lines: A third kind of buyer wants company archives for AI training. Micro1, which supplies training data to AI developers, made its disclosure in support of a $12.5 million offer for Spirit Airlines' email and chat archive, which the previous issue covered. SimpleClosure, a company that helps startups shut down, said on September 3 that its marketplace now accepts listings from companies that are still operating. (Fortune, Sep 14)

13 yrs

Of Slack, Jira, email and Drive files one failed startup sold for hundreds of thousands of dollars

$10K-$100K

What a shut-down startup's assets typically fetched on SimpleClosure, per its CEO in April

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From Tribal Knowledge to Digital Advantage: AI That Scales Your Best Techs (SME Media, Sep 17, 2026) Clip: 8:09-9:10. Nick Haase of MaintainX, which sells maintenance software, says most of what maintenance systems hold today shows whether work orders were closed, not the context of the work, and that capturing that record of work comes first.

CONTINUED ON NEXT PAGE →

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ONLY WHAT WAS WRITTEN DOWN

The largest of the three figures rests on a factory's own history. CADDi Design Review, one of six products CADDi says are built partly to capture what experienced engineers know, 'flags potential errors in new drawings and CAD models based on past problems with similar parts.' CEO Yushiro Kato told Fortune that most of the knowledge behind manufacturing work, including 'why a company chose a particular supplier or designed a part in a particular way, is never recorded anywhere.' Kato declined to disclose revenue or customer counts. (Fortune, Sep 15)

Why it matters: Software can only search, sell or hand on what exists as a record. Devin Bhushan, founder of Squint, which makes software for factory floors, told PYMNTS that at his industrial customers 'there was a lot of stuff that was in people's heads that had never been documented.' Squint says its tool for analyzing a production line only suggests changes. A plant manager accepts, changes or rejects each one. (PYMNTS, Sep 11)

Yes, but: Even a well-run plant can keep records that leave out how each problem was fixed. David Johnson, Nissan's senior vice president for manufacturing and supply chain management, said in a talk posted on September 10 by MIT's Machine Intelligence for Manufacturing and Operations program that Nissan's Inspect system logs every issue from stamping to the end of the line, but doesn't record in a standard way how each one was resolved. He called that record 'our best source of data moving forward.' (MIT MIMO, Sep 10)

The opening: The companies with the most to gain are those whose records already explain why things were done. Ken Hara, a partner at Coreline Ventures, which joined CADDi's round, said 'AI only delivers where a data layer and a semantic layer already exist.' (Business Wire, Sep 16) A manufacturer that never wrote down why its parts look the way they do has nothing for search software to find, and nothing for a data buyer to pay for.

"No amount of ML or applied AI could actually help them because there was no context for that AI to work on top of."

- DEVIN BHUSHAN, SQUINT, SEP 11

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David Johnson - Using LLMs to Capture Tribal Knowledge and Democratize Globally at Nissan (MIT MIMO, Sep 10, 2026) Clip: 22:27-23:41. David Johnson, Nissan's senior vice president for manufacturing and supply chain management, says a language model built on engineering documents and repair guides still misses what a 30-year technician learns, and that the Inspect system records every issue but not in a standard form for how it was fixed.

07 FEATURE

WHO KEEPS THE COPY

Nvidia, Booz Allen and Palantir Limit Anthropic's Fable Over How Long Logs Are Kept

Some of the largest AI buyers are keeping their own code and data away from Anthropic's most capable model because of what the company may retain. Anthropic announced replacement terms on September 1, and The Information reported the limits two weeks later.

SOURCES: THE INFORMATION | PYMNTS | THE REGISTER | ANTHROPIC | CONSTELLATION RESEARCH | WITNESSAI

QUICK TAKE

- Anthropic's June terms let it keep customer usage logs even for customers that had negotiated zero data retention (- PYMNTS, Sep 15)
- Palantir won't offer Fable through its platform until Anthropic gives an irrevocable zero-data-retention guarantee, The Information reported (- PYMNTS, Sep 15)

- Anthropic's replacement stores retained data in the customer's own cloud under the customer's keys, and is rolling out in phases (- The Register, Sep 2)
- Salesforce launched its AIforce layer on Tuesday with zero data retention as a listed feature (- Constellation Research, Sep 15)

A company's memory includes the copies its software vendors keep. In June, Anthropic, the maker of the Claude models, gave itself the right to retain customer usage logs for 30 days for its most capable models, including Fable, 'and up to two years if its safety systems flag them.' On Monday, Laura Bratton and Aaron Holmes (The Information) reported that Nvidia, Booz Allen Hamilton and Palantir were limiting where Fable may be used as a result. (PYMNTS, Sep 15)

What's new: Enterprise buyers have long chosen models mainly on capability, speed and price. These buyers are limiting a frontier model over what its maker keeps, and PYMNTS reports that 'data retention terms are becoming as decisive as model performance in determining which AI systems large enterprises deploy.' For a company, who holds the copy of its work is now a buying criterion of its own.

Why it matters: The objections are about each company's own work product. Bill Vass, chief technology officer of Booz Allen, said 'we worry a little bit that [Fable] might be learning from some of our code,' and added that the concern covers a small share of the firm's work. Justin Boitano, Nvidia's vice president of enterprise AI, said zero data retention 'should be on by default.' Nvidia, an Anthropic investor, uses its own Nemotron models for sensitive work such as supply chain monitoring, according to the report. Anthropic and OpenAI both say they don't train on enterprise customer content by default.

Between the lines: Anthropic had already changed course. On September 1 it announced Enterprise Frontier Safeguards, under which customers keep retained data in their own cloud under their own encryption keys while Anthropic's automated misuse detection keeps running, and the customer's security team reviews anything flagged. (Anthropic, Sep 1) Customers still have to apply for zero data retention, and the announcement says it is rolling out in phases. (The Register, Sep 2)

The opening: Retention terms are now something vendors sell. Salesforce launched AIforce on Tuesday with zero data retention for frontier models as a listed feature. (Constellation Research, Sep 15) A US utility told the article it dropped a planned test of Fable on core power systems over the same assurance, while still using Anthropic for finance and human resources work. WitnessAI, a company that sells AI governance software, says a company 'remains responsible for governing that data even when it is retained by an AI vendor.' (WitnessAI, Sep 8)

30 days How long Anthropic's June terms let it keep customer usage logs	**2 yrs** How long it could keep logs its safety systems flagged

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Fable 5.1 and Anthropic's Data Retention Pivot (Sharp Tech Podcast, Sep 11, 2026) Clip: 12:16-13:01. Hosts Ben Thompson and Andrew Sharp discuss Anthropic's June retention terms, recorded after the company announced their replacement, and argue that enterprises have never accepted vendors keeping their data.

08 FEATURE

WHEN THE ADVISOR RETIRES

Only 42% of Financial Advisors Have a Formal Succession Plan, Edward Jones Finds

In a survey of 233 advisors for Edward Jones, nearly all said succession planning matters and fewer than half had a formal plan. What a successor inherits is the client relationship, and much of its history sits in one advisor's notes and memory.

SOURCES: EDWARD JONES RELEASE | WEALTHBOX | NONPROFIT QUARTERLY | ALPHA FMC

QUICK TAKE

- Morning Consult surveyed 233 financial advisors for Edward Jones from July 14 to 18 (- PR Newswire, Sep 14)
- 86% of junior advisors said they want to acquire or inherit an established practice (- PR Newswire, Sep 14)
- Cerulli, a research firm, projects that more than 35% of advisors will retire over the next decade (- PR Newswire, Sep 14)

Edward Jones, the brokerage firm, released research on Monday that puts a number on a gap across the advice business. Nearly all of the advisors Morning Consult surveyed for it said succession planning matters, but 'only 42% have a fully documented, legally formalized plan in place.' (PR Newswire, Sep 14)

What's new: Advisors have been warned about succession for years. This survey puts figures on both sides of the handoff: 58% of the advisors surveyed lack a fully documented, legally formalized plan, and most junior advisors want to buy a practice. What changes hands is the client history, so how well that history is written down affects what a buyer actually gets.

Why it matters: Advisors hand on client relationships, and the history behind each one often lives with the advisor. Writing about another relationship business on Thursday, Aine Creedon (Nonprofit Quarterly) said that when an experienced fundraiser leaves, the organization 'loses years of accumulated knowledge about donors, institutional history, and relationships that may have taken years to develop.' (Nonprofit Quarterly, Sep 17)

The opening: The buyers are there. The survey found that '86% of junior financial advisors are interested in acquiring or inheriting an established practice.' Jason Henderson, who heads financial advisor recruiting at Edward Jones, said advisors 'know succession planning matters, but aren't doing enough about it.' Edward Jones recruits advisors, so it has a stake in the finding.

Between the lines: Much of the record a successor needs sits in software the advisor already uses. Wealthbox, which makes client-management software for advisors, said on Monday it is a launch partner for Anthropic's Claude for Financial Advisors, and its CEO, John Rourke, said 'advisors have spent years building deep client context in Wealthbox.' (Wealthbox, Sep 14) Alpha FMC, a consultancy, wrote that when a senior hire leaves, 'the context that only ever existed in their inbox and notes leaves with them.' (Alpha FMC, Sep 16)

61%	38%

Senior advisors who say finding a successor they trust is emotionally hard

Advisors leaving within five years who have a specific successor in mind

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Financial Advisor Succession: Build Your Next-Gen Bench Before You Need It (with Jackie Wilke) (Total Succession, Sep 8, 2026) Clip: 10:13-10:53. Jackie Wilke of First Trust and hosts Tyson Ray and Kim Cochenour discuss why a practice holds together after a senior advisor retires when the core client relationship carries over to the successor.

09 MOVERS AND SHAKERS

MOVERS AND SHAKERS

This Week in the News

14 people who made the news this week regarding Organizational Intelligence, ordered smallest-to-largest by their organization's estimated headcount. Tap a name to search LinkedIn.

BOUTIQUE · UNDER 50 PEOPLE

3 PEOPLE

Ken Hara

LINKEDIN →

Partner, Coreline Ventures

"AI only delivers where a data layer and a semantic layer already exist" P.6 →

Sarah Levy

LINKEDIN →

Co-founder and CEO, Euno

"a unique knowledge that is actually in people's minds" P.4 →

Aine Creedon

LINKEDIN →

Fundraising consultant and Nonprofit Quarterly contributor

"years of accumulated knowledge about donors" P.8 →

GROWTH · 50 TO 999 PEOPLE

6 PEOPLE

Devin Bhushan

LINKEDIN →

Founder and CEO, Squint

"had never been documented" P.6 →

Yushiro Kato

Co-founder and CEO, CADDi

"is never recorded anywhere" P.6 →

LINKEDIN →

Travis Kassay

Insight Partners

"Every AI session today is that new hire" P.4 →

LINKEDIN →

John Rourke

CEO and co-founder, Wealthbox

"years building deep client context" P.8 →

LINKEDIN →

Nick Haase

MaintainX

Said maintenance systems mostly record whether work orders were closed, not the context of the work.

LINKEDIN →

Jackie Wilke

First Trust

Discussed why a practice holds together when the core client relationship carries over to a successor.

LINKEDIN →

ENTERPRISE · 10,000 PEOPLE AND UP

5 PEOPLE

Barry Hytinen

Chief financial officer, Iron Mountain

Told investors that digitization projects can begin with material Iron Mountain already stores for customers.

LINKEDIN →

Justin Boitano

Vice president of enterprise AI, Nvidia

"should be on by default" P.7 →

LINKEDIN →

Bill Vass

Chief technology officer, Booz Allen Hamilton

"might be learning from some of our code" P.7 →

LINKEDIN →

Jason Henderson

Principal and head of financial advisor recruiting, Edward Jones

"aren't doing enough about it" P.8 →

LINKEDIN →

David Johnson

Senior vice president, manufacturing and supply chain management, Nissan

"our best source of data moving forward" P.6 →

LINKEDIN →

10 THE FUTURE OF ORGANIZATIONAL INTELLIGENCE

UPCOMING

NEAR-TERM SEP 29 2026

Relativity Fest 2026, Hyatt Regency Chicago

A large e-discovery user conference for the legal and compliance teams who preserve and search a company's chat and email when litigation arrives.

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THIS QUARTER NOV 16 2026

KMWorld 2026, Washington, DC

The main US gathering of knowledge managers, the practitioners who decide how a company captures and maintains what its people know.

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ON THE HORIZON MAR 1 2027

Legalweek New York 2027, Javits Center

A major legal-industry trade show, where the law firms and corporate legal departments that negotiate records, retention and data-licensing terms for AI tools meet.

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PREVIOUS EDITIONS

Sep 10 2026 **Spirit's Emails, Rehires, Meeting Summaries** →

Sep 3 2026 **Appraisal, Interviews, Substrate** →

Aug 26 2026 **Schedules, Tickets, Polished Drafts** →

THE METHOD

How This Magazine Was Created

This magazine, and all the magazines in the Humanity Labs AI Magazine series, were created using Hawkeye, an AI system built for people who work in fields too large and too fast-moving to keep on top of alone.

Every week Hawkeye reads thousands of items across mainstream press, trade publications, government records, vendor announcements and company newsletters, then clusters them to find the themes that are actually emerging rather than the ones already being discussed.

For this issue the consideration set ran to roughly 100 candidate items across seven source classes: journalism, vendor and company announcements, practitioner publications, court filings, government records, registries and event programs. A first draft was written with Claude Opus, checked against primary sources, and edited by Marshall Kirkpatrick.

Where a claim rests on a company's account of its own product, this magazine says so on the page.