
PremiumRadar — Control Plane v2.0 (FROZEN)

Status:  FROZEN

Applies to: Super Admin, OS Runtime, Workspace Resolution

Out of scope: CRM lifecycle, system-of-record data models

1. Purpose

The Control Plane defines **how sales contexts are created, governed, activated, and resolved** inside PremiumRadar.

This is **not UI logic** and **not runtime intelligence**.

It is the **authoritative configuration layer**.

2. Core Design Principles (Non-Negotiable)

1. Authority precedes intelligence
 2. Super Admin is the only write authority
 3. Incomplete configurations must never reach runtime
 4. Determinism > convenience
 5. Primary sales target drives discovery; relationships provide context
 6. Inheritance over duplication
 7. Immutability for identity, mutability for behavior
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3. Canonical Hierarchy (Locked)

```
Vertical (Sales Domain)
├── Sub-Vertical (Sales Motion)
│   ├── primary_entity_type (MANDATORY)
│   ├── related_entity_types (OPTIONAL)
│   └── Region Context (hierarchical)
│       ├── Persona (scoped)
│       └── Persona Policy (versioned lifecycle)
```

All five layers are **mandatory for runtime eligibility**.

4. Definitions

4.1 Vertical (Sales Domain)

Represents:

The salesperson's domain of work.

Examples:

- Banking
- Insurance
- Real Estate
- Recruitment
- SaaS Sales

Rules:

- No entity type
 - Immutable key
 - Mutable display name
 - Cannot be activated alone
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4.2 Sub-Vertical (Sales Motion)

Represents:

A concrete sales motion inside a Vertical.

Examples (Banking):

- Employee Banking
- Corporate Banking
- Personal Loan
- Home Loan

Fields:

- `primary_entity_type` (MANDATORY, immutable)
- `related_entity_types` (OPTIONAL)

Rules:

- Exactly **one** primary entity type
- Related entities are contextual only
- Discovery, ranking, and outreach are driven **only** by primary entity

Example:

```
Sub-Vertical: Corporate Insurance  
primary_entity_type: company  
related_entity_types: [individual]
```

4.3 Entity Type Semantics

Primary Entity Type

- The object being discovered, ranked, and sold to
- Drives signals, enrichment, personas, outreach

Related Entity Types

- Supporting entities required for compliance or workflow
- Never drive discovery or ranking

This avoids:

- Multi-entity chaos
 - CRM-like overreach
 - Signal contamination
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5. Region Context (Mandatory)

5.1 Region Is Context, Not Identity

- Region is **not** a new vertical
- Region is **not** free text
- Region affects behavior, compliance, language, personas

5.2 Region Hierarchy

Regions are **hierarchical**.

Example:

GLOBAL



Resolution Rule:

Longest match wins

6. Persona Model (With Inheritance)

6.1 Persona Scope

Each Persona has a scope:

- GLOBAL
- REGIONAL
- LOCAL (rare)

6.2 Persona Resolution Order

LOCAL → REGIONAL → GLOBAL

If no match is found → configuration is **INVALID**.

6.3 Persona Constraints

- Persona.entity_type **must match** Sub-Vertical.primary_entity_type
 - Personas cannot exist without a Sub-Vertical + Region context
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7. Persona Policy (Lifecycle-Safe)

7.1 Policy States

DRAFT → STAGED → ACTIVE → DEPRECATED

7.2 Policy Binding

Each Persona maintains:

- active_policy_id
- next_policy_id (optional)

7.3 Guarantees

- Zero downtime rollout
 - Blue/green policy deployment
 - Audit-safe transitions
 - No hot swaps without staging
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8. Runtime Eligibility Rules (Hard Gate)

A configuration becomes **runtime-eligible ONLY IF**:

- Vertical exists and is active
- Sub-Vertical exists and is active
- Region resolves
- Persona resolves via inheritance
- An ACTIVE policy exists

Otherwise:

```
status = DRAFT
runtime_eligible = false
```

No partial resolution. No fallback. No guessing.

9. Explicit Non-Goals (Important)

The Control Plane does **NOT**:

- Model full CRM entity lifecycles
- Track candidate → employee transitions
- Replace core banking systems
- Perform runtime inference
- Allow UI-level shortcuts

Those belong elsewhere.

10. Governance Rules

- Keys are immutable forever

- Display names are mutable
 - Deletions are destructive and audited
 - No seed scripts
 - No non–Super Admin write paths
 - All writes are audited
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11. Version Freeze Declaration

Control Plane v2.0 is frozen.

Changes require:

- Explicit v3 proposal
- Written migration plan
- Backward compatibility strategy

No incremental “small tweaks”.



Freeze Confirmation

You can now confidently say:

“Control Plane v2.0 is frozen.
UI implementation must conform exactly to this spec.”
