

Today's Agenda

1) Evaluating the Adequacy of Scope of the Retention Schedule

- Has the scope been impacted by acquisitions and new products, for example.
- Has the organization's jurisdictional footprint changed? Does it consider all of the relevant jurisdictions for doing business?

2) Validating Current Retention Periods

- Business/operational based retention periods
- Legal requirements

3) Opportunities to Consider Privacy

- Breaking out outliers
 - Sensitive PI
 - Compelled Requirements
- Low Hanging Fruit: Permanent retention periods

4) Opportunities to Simplify

- Vertical & Horizontal
- Similar Processes
- Similar Retention Periods