

Records Retention in the Age of Cloud, Collaboration Tools & Hybrid Work

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80%

Enterprise data in unstructured formats

A staggering **80% of enterprise data** now exists in unstructured formats, highlighting the pressing need for updated retention schedules that address this new reality.

Discussion Points

Platforms

Identify collaboration platforms your retention schedule currently overlooks and assess potential governance gaps.

Blind Spots

Determine which platform generates the most significant governance blind spots and challenges for your organization.

Summary

Identify the most significant governance blind spots and challenges for your organization.

Microsoft 365



Chats

Teams chats are stored in **Exchange Online**, necessitating separate retention policies for compliance and defensibility.

Files

Files reside in **SharePoint/OneDrive** for governance.

Purview

Purview is the **unified governance framework** for all platforms.

Slack & Google



Retention

Slack's native retention features offer only binary options, making it challenging to enforce nuanced retention policies across channels and messages effectively.

Deletion

User preferences can override established policies.

Vault

Google Vault requires careful governance configuration.

The Hyperlink Problem

Understanding document retention gaps

Linked Document Issues

In collaboration platforms like Teams and Slack, documents are often shared as hyperlinks, creating a gap where retaining conversations does not ensure document retention, leaving records vulnerable.



Classification

Structure

Traditional classification systems are built on the assumption of a defined structure, where documents are organized within folders and naming conventions that facilitate easy retrieval and management.

Unstructured

Teams, Slack, and shared drives lack structure.

Automation

AI auto-classification requires predefined rules.

Ownership of Platform Governance

Governance Decisions

Identifying who in your organization is responsible for making governance decisions regarding Teams, Slack, and Google Workspace is crucial.

Procurement Involvement

Ensuring Records Management is part of the platform procurement process is essential for effective data governance and compliance.

Records Management

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The Three-Party Standoff

IT

IT departments advocate for **shorter retention** periods to minimize storage costs and security risks, prioritizing efficiency and management of digital assets.

Legal

Legal teams prefer **longer retention** to ensure comprehensive coverage for litigation and compliance requirements, emphasizing the need for historical data preservation.

Records

Records Management seeks **schedule-aligned retention**, emphasizing consistent policies that balance compliance and operational efficiency for effective governance.

Discussion: Resolving the Standoff

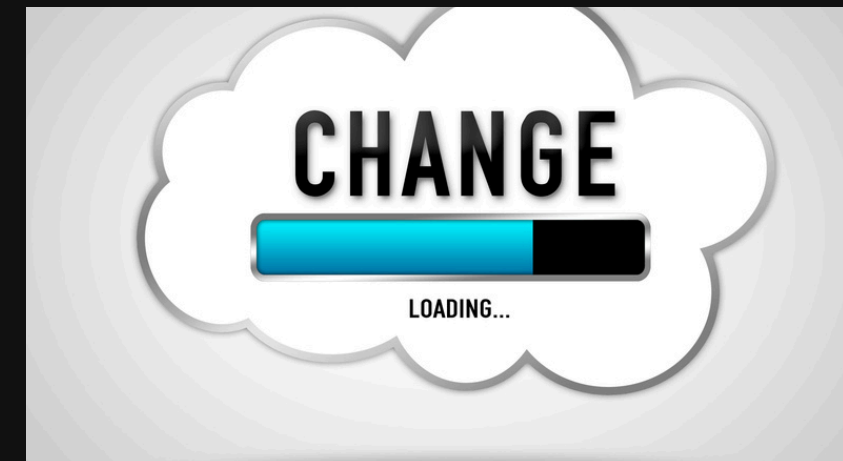
Governance

Disagreements between IT, Legal, and Records can be resolved through **structured governance**, ensuring all parties have a voice.

Collaboration

A formal governance committee can facilitate **better collaboration**, helping to align retention policies across departments and platforms.

Essential Governance Changes for Your Organization



Update Schedule

Ensure your retention schedule includes specific guidelines.



Update Legal Holds

Adapt legal hold processes for all collaboration platforms.



Establish Records Management

Involve Records Management in platform procurement decisions.

Retention Defensibility

To achieve defensibility across platforms, organizations need a **written policy** that addresses all collaboration tools in use, ensuring consistent application, documented exceptions, and evidence of reasonable efforts to maintain compliance and governance under scrutiny of legal requirements.



Let's Connect!

