# Retention Policy Design Workshop

## Status: Planned - Q3 2025

**Expected Duration:** 3-4 weeks  
**Target Audience:** Organizations needing systematic records management  
**Prerequisites:** Sensitivity Labelling Uplift or equivalent data classification maturity

## Purpose & Problem Solved

This workshop addresses the complex challenge of designing retention policies that balance business needs, regulatory requirements, and storage optimization. Many organizations struggle with ad-hoc retention approaches that create compliance risks and inefficient data management.

This engagement provides a structured framework for retention taxonomy design, automated policy deployment, and ongoing governance that aligns with business processes and regulatory obligations.

## Expected Deliverables

* Comprehensive retention taxonomy aligned to business functions and regulatory requirements
* Automated retention policy framework using Microsoft Purview
* Legal hold and litigation readiness procedures
* Records management governance structure with roles and responsibilities
* Compliance reporting and monitoring framework
* End-user training materials and change management guidance
* Integration roadmap with existing information architecture

## Integration with E2 Portfolio

**Natural Progressions:** - Sensitivity Labelling Uplift → Retention Policy Design (classification enables retention) - Data Security Audit → Retention Policy Design (governance foundation) - Retention Policy Design → eDiscovery Optimization (future module) - Retention Policy Design → Compliance Automation Program (future module)

**Complementary Services:** - Security Roadmap Workshop (strategic context for retention decisions) - Information Governance Assessment (broader governance alignment)

## Key Focus Areas

* **Regulatory Alignment:** PSPF, GDPR, industry-specific retention requirements
* **Business Process Integration:** Retention policies that support operational workflows
* **Automated Classification:** Leveraging sensitivity labels for retention triggers
* **Legal Hold Management:** Procedures for litigation and investigation scenarios
* **Storage Optimization:** Balancing retention needs with cost and performance
* **User Experience:** Making retention compliance intuitive and efficient

## Express Early Interest

Contact Engage Squared to join the early engagement program and provide input on module scope and priorities.

**Contact:** E2 Compliance Practice Lead  
**Development Updates:** Progress shared through E2 newsletter and partner channels