Not Your Grandpa’s Approach
to Retention and Disposition

Leigh Isaacs, CIP
Director, Information Governance &
Records Management
Proskauer Rose LLP

Andrew Corridore, CIP
Information Governance Compliance Specialist
Proskauer Rose LLP
What Will We Learn?

- Practical and innovative approaches to designing and implementing a retention and disposition program.
- “A-HA!” moments from experience.
- Actual strategies you can consider and apply when you get back to your desk.
NEED

DON'T NEED

WILL NEVER NEED IN A MILLION YEARS
BUT CAN'T RISK THROWING OUT
BECAUSE THE REMOTE RISK THAT I
MIGHT NEED IT WILL KEEP ME UP AT NIGHT

3-7-16
Back to Basics

- Importance of program sponsor
- Buy-in from key stakeholders
- Established roles and responsibilities
- Leveraging in-house systems
- Value of inter-departmental collaboration
- Metrics
- Importance of procedures and program documentation
- Slow and steady wins the race
Tips and Tricks

- Preliminary Attorney Outreach
- Address Research & Letter Generation / Sending
- Creative Resourcing
- Response Logging (including RTS)
- Disposition Action
- Proper audit trail maintenance / data logging
Things That Made Us Smarter

- Consequences of skipping preliminary email phase
- Unintended destruction of partner labeled “do not destroy”
- Historical significance differing person-to-person
- Handling client on-site review at Iron Mountain
- Special requests
- Unintended surprises – discovering other file inventories
- Change in key program sponsor
- Oh, the things in those boxes…
- And because things aren’t interesting enough – a wholesale office move!
- Partnering with mobility efforts
- Elevating visibility of department for other projects
- Building a business case for additional program investments
Want More?

- Reach out with all questions!
  - Lisaacs@Proskauer.com; https://www.linkedin.com/in/leighisaacs
  - Acorridore@Proskauer.com; https://www.linkedin.com/in/andrew-corridore-cip-65581a21

- Ask to join our Legal Retention & Disposition Roundtable Discussion!
  - Industry leaders meeting to discuss & share