

# Execution, automation, and training

Automate records classification, tagging, access controls and collaboration using tools and technology you already own. Drive program awareness, acceptance and support through employee behavior change management and training.

Even the best-written records retention policies will fail if they are not implemented effectively and consistently. Yet attempting to force employees to follow time-consuming manual processes to identify, look up, tag, and eventually delete files, emails, and other information is largely ineffective, in turn creating even more risk. We help close the gap between policy and execution.

Through our data placement and automation services, we help organizations leverage technology and products they already own to automate classification, retention and disposition, including:

- configuring platforms like Microsoft 365 so that classification, tagging, retention, and disposition happen automatically, often in five seconds or less, rather than depending on employees to remember and apply the rules themselves,
- building and facilitating communication and training programs that change how employees actually save, store, and delete information, including habits like 'saving everything forever,' and
- helping organizations work through backlog and defensibly dispose of aging files, emails, and paper records so that legacy over-accumulation does not continue to drive up cost and risk.

## Data placement and automation services

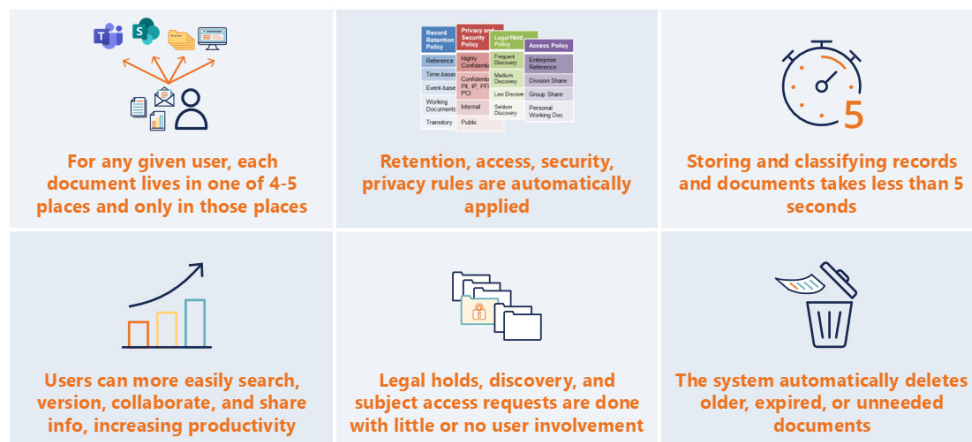
Modern content management systems, including Microsoft 365 and other enterprise content management systems, can be configured to allow automatic classification through inheritance, tagging, retention, and disposition. We automate information governance tasks by teaching retention rules to the system, enabling users to classify, store, and tag information in five seconds or less.

### ***The five-second rule***

The entire process for any employee to look up rules and classify, tag, and move information into the correct repository cannot be longer than five seconds, or many employees will not follow these processes.

This reduces the burden on end users, drives employee productivity, and facilitates consistent, compliant, and defensible governance and disposition across the enterprise.

Employees experience the benefit of a fully implemented environment where policies and processes are integrated with technology:



*Figure 1. In order to be successful and compliant, information classification needs to be nearly effortless for employees. This is achieved through automation.*

Contoural develops and executes frameworks for the placement, management, and control of electronic records, including unstructured data, email documents and content, and other data. Our services enable organizations and employees to consistently apply records retention, document retention, data security classification, legal hold, and access controls to files and emails using the products and technologies they already own.

## Data placement strategy

We develop a comprehensive, enterprise-wide information management framework for defensible and compliant retention management, data security classification, collaboration, efficient storage, and disposition of unstructured data, including files and email. This drives automation for classification, tagging, retention, access, and controls when information is placed in a repository.

This process answers key questions, including:

- How can we ensure records retention, document retention, data security classification, legal holds, and access controls are applied consistently across all files and emails in the organization?
- How can we enable employees to classify, save, and tag information to meet all information governance requirements in five seconds or less, while keeping the process simple and intuitive?
- How can we make valuable information accessible for collaboration while effectively reducing and deleting low-value data and expired records?
- How do we ensure personal information and other sensitive data are properly classified, protected, retrievable, and deleted in compliance with requirements?
- How can our information governance and document retention strategy drive employee productivity, including for remote workers?
- How do we ensure governance practices, including disposition strategies, are compliant with regulations and defensible across the enterprise?
- How do we ensure that legal holds are both responsive and defensible, preserving only the information that is truly relevant?
- How can we automate the disposition of unnecessary data in a way that avoids conflicts and does not rely on manual processes by employees?

The strategy is developed through a series of workshops to determine which systems will be used moving forward. This process identifies systems requiring remediation and outlines the approach for migrating data from legacy systems into newer repositories. Beyond addressing system-related issues, the strategy also considers the change management needed to influence employee behavior effectively.

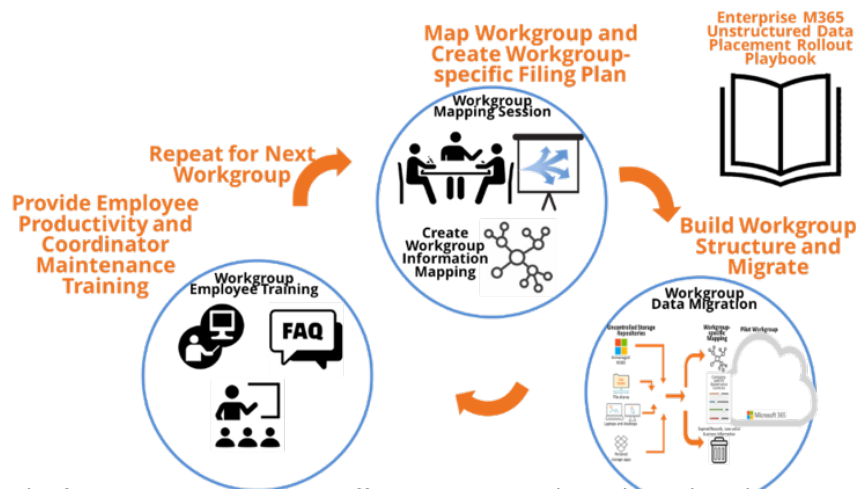
## M365 configuration and provision

We define a customized, organization-specific, enterprise-standard M365 configuration for unstructured data and create a provisioning process to implement this configuration across the enterprise.

This includes training and demonstration of retention and sensitivity labels, creating scripts to implement standard configuration across the enterprise, reviewing migration strategies, and providing knowledge transfer of how to use both front-end and back-end M365 capabilities for information governance in a testbed environment.

## Data placement mapping and migration (pilot approach)

We pilot data placement mapping and migration with a set number of user groups as documented, repeatable processes. This includes mapping all content with source/destination, proposed file structures, and default retention and sensitivity, as well as required metadata. Once the mapping is finalized, the files are migrated into the newly organized repositories.



IT and Information Governance staff can participate throughout the pilot process. With this “teaching to fish” experience, some organizations may elect to drive the rest of the full enterprise rollout with their own internal resources, engaging Contoural consultants as subject matter experts for as-needed assistance and questions. Once the process is developed, it is highly repeatable across dozens or even hundreds of workgroups. This rollout can be done by the client's team, or Contoural can assist.

## M365 in-place email management

We configure M365 in-place email governance within Outlook, including retention and sensitivity label creation, script development, and publishing. Email management knowledge transfer includes educating and training Legal and IT personnel on the configuration of a records retention schedule and data classification policy in M365, along with assisting with rollout of the solution to all employees. This establishes the foundation for future migration of data.

## Unstructured data mapping and migration

We conduct enterprise-wide implementation of mapping and migration. This includes the buildout of new sites or re-organization of existing sites, migration of data to those sites, validating that all required data has been migrated and configured to match existing policies as defined in the filing structure produced during the mapping phase, and making further configurations as necessary for each business group's SharePoint library/site.

## Data placement/email implementation SME

We provide fractional or transitional support with data placement or email implementation.

## Behavior change management and training services

Behavior change management is a critical component to program adoption and employee compliance. Employees tend to hoard emails, files, and documents and “save everything forever”. This increases costs and legal or compliance risks while decreasing productivity. Simply instructing them to stop rarely works, while aggressive deletion policies may backfire. Even with perfect policies and technology, if employees do not change their habits, the program will not work.

We develop and deliver tailored change management programs that include strategic communication plans, customized training, and prescriptive guidance. We get employees to care about records management, document retention, privacy and managing sensitive information by effectively communicating program benefits and involving them in concise and engaging training. Ultimately, this fosters compliance and productivity by bringing user behavior in line with information governance policies, processes, and systems.

### Change management communication and training

Our Information Governance Communications and Training Plan provides the framework for change management activities. The customized and tailored plan includes program purpose and objectives, success criteria and metrics, audience segments, communications and training schedule, international training needs, training content development plan, communication and training delivery vehicles (computer-based, corporate trainers, etc.), and a detailed training pilot program plan.

### M365 employee training

We train employees on using M365 for productivity, records retention, and management of sensitive information.

### M365 site owner and coordinator maintenance and monitoring training

We train site owners and coordinators on creating and maintaining records retention and sensitive information functionality in M365 components.

## Document and data disposition services

Ongoing over-accumulation of electronic and paper information drives up costs, increases risks, and hurts employee productivity. A smart, real-world approach to legacy document and data disposition enables organizations to tame growing piles of unneeded information (and cut costs in the process).

We help organizations evaluate existing email, file, and paper information and develop defensible and standardized deletion processes.

### Legacy file and email remediation

We develop and execute strategy to identify and defensibly delete older, non-record files and emails. Beginning with an assessment of the existing unstructured data repository (for files) or engaging key stakeholders to understand current practices and identify email management requirements (for email), we develop programmatic and user-based disposition strategies along with file or email retention audit processes, based on the desired future state. This allows for demonstrably defensible deletion.

## Paper records inventory and cleanup

We inventory, classify, and institute defensible disposition processes for onsite and offsite paper records. Beginning with a recommended plan and then through a paper records inventory and cleanup, we develop standard processes and procedures for record owners, records managers, and teams to inventory and dispose of existing collections of inactive paper records.

Defensible, standardized, and easy-to-follow paper disposition processes allow for scalability, where it is not necessary to review every document in every folder to have a compliant disposition process. A pilot on-site triage and disposition exercise allows employees to understand and implement the records retention schedule as it applies to inactive paper records. Fractional records manager staffing is also available to help execute processes.

## Offsite storage vendor audit and agreement restructuring

We assist organizations with storage vendor audit and agreement restructuring to ensure that billing is accurate and in line with contract terms, expired records are removed and destroyed in a timely manner, and costs are minimized, as well as to assess current and future offsite paper retention needs in order to favorably restructure agreements and reduce offsite storage costs.

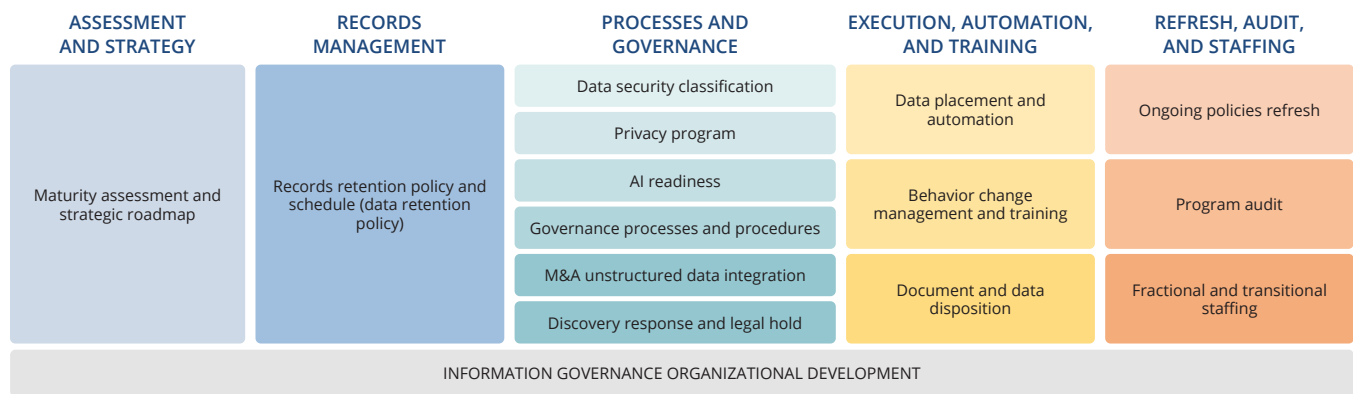
# About Contoural

Contoural is the largest independent provider of strategic records management and information governance, privacy, and AI readiness consulting services, serving more than 30% of the Fortune 500 along with numerous medium and small enterprises, non-profits, and public sector organizations.

We do not sell products or take referral fees. Our seasoned team of attorneys, compliance officers, records managers, IT professionals, and change management experts brings both deep industry-specific knowledge and a proven methodology refined across hundreds of engagements worldwide.

## What we do

We offer the industry's most comprehensive suite of information governance strategic consulting services, from assessment and planning to execution, training, and staffing.



TRUSTED BY  
**30%**  
OF THE FORTUNE 500

PROGRAMS  
IMPLEMENTED IN  
**150+**  
COUNTRIES

INDEPENDENT  
CONSULTANTS WITH  
**26**  
AVERAGE YEARS OF  
EXPERIENCE

## How we help

Our expert consultants help organizations ensure compliance, mitigate risks, reduce costs, achieve executable outcomes, and enhance employee collaboration and productivity, all based on their unique profile.



### INDEPENDENT

We do not sell or resell products, take product referral fees, or provide discovery services. Our advice is based solely on the needs of our clients.



### EXPERIENCED

With both deep and broad experience within and across industries, we leverage our tried-and-true methodology and the expertise of our consultants.



### CROSS-FUNCTIONAL

We work with major stakeholders in legal, privacy, compliance, records management, IT, information security, and business units to create consensus and execute projects.



### GLOBAL

Having developed programs for information governance operations in 150+ countries, we understand local requirements and can integrate these into a global program.

## Our approach

Developing and executing records management or information governance, privacy, and AI readiness programs can feel like climbing a steep mountain. Choosing the right path to ascend is difficult. Some routes are shorter but very steep, while others are longer but more gradual.

We employ a divide and conquer strategy, breaking the effort into manageable steps over time and identifying 'quick wins' that build momentum and buy-in throughout the process. Many clients participate side by side in our engagements, leveraging them as skill-building opportunities.

*The name "Contoural" comes from our founder's passion for trail running. Understanding the contours on a topographical map can suggest the best way forward.*

## Contact us today:

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