

Refresh, audit, and staffing

Keep your governance program current and effective through regular policy updates, independent audits, and flexible staffing options that scale with your organization's needs.

A records retention schedule is not a “set it and forget it” document. As laws change, new record types emerge, and business needs shift, a defensible program can drift out of compliance without regular management and monitoring. Contoural helps organizations regularly maintain, audit, and manage their records management or information governance program.

- We refresh retention schedules and privacy notices on a regular cadence so that policy keeps pace with legal and regulatory change while avoiding pitfalls of auto-updating schedules.
- We conduct independent audits of records management, privacy, legal hold, and related governance functions to identify control gaps before they turn into real risks.
- We offer fractional and transitional staffing by experienced information governance and records management professionals who integrate seamlessly with in-house teams, backed by the full weight of Contoural's delivery team.

Our services

Ongoing policies refresh

Keep policies and schedules up to date. A records retention schedule or data retention policy is a living framework that must evolve as organizations and regulatory landscapes change. New record types emerge, legacy records become obsolete, legal citations are updated, and new recordkeeping and privacy laws take effect. All of these require thoughtful review to avoid creating unintended risk.

We provide ongoing refresh services for records retention schedules (data retention policies) and related privacy notices, ensuring they meet new legal, regulatory, business, and privacy requirements while preserving defensibility and reducing risk.

Risks of auto-updating schedules

Technology now permits schedules to be managed and automatically updated online as laws and regulations change. Automatically-updated retention periods may seem more compliant, but they present a new type of risk.

Regulators are looking for companies to demonstrate they are following their policies. If a schedule is updated every month, a company would in turn need to update their records processes and training every month. When a company's policy changes, there is the expectation that processes are updated concurrently. This amount of process change is challenging for most organizations, increasing the likelihood of a gap between policy and implementation.

Our structured review identifies new and revised legal and regulatory requirements, emerging privacy obligations, newly created or received record categories (including personal information), and records that are no longer generated. We also reassess retention periods based on current business value and operational needs.

This service can be performed on a predetermined yearly, 18-month, or other term. We recommend that schedules be refreshed every 12 to 18 months, accounting for:

- New and revised legal and regulatory requirements
- Emerging privacy obligations
- Newly created or received record categories (including personal information)
- Records that are no longer generated
- Changes in business value, adjusting retention upward or downward based on business usage

Program audit

Identify gaps before they become risks. Regular audits of user and system adherence to established policies and processes are essential to sustain compliance and identify program gaps before they become risks. Audit findings inform a continuous improvement cycle, prompting timely updates to policies, procedures, and controls and the prompt remediation of identified weaknesses.

We design and execute comprehensive audits across records management, privacy, legal hold, and related governance functions. Our approach evaluates both individual program components and the integration and coordination across teams. We identify control gaps, recommend and help implement practical remediation strategies, and reassess enhanced processes to confirm they meet regulatory, legal, and operational requirements.

Audits should be an ongoing process to ensure continued compliance.

Fractional and transitional staffing

Support and drive your day-to-day records program. Our experienced consultants provide part-time extended period or full-time transitional staffing support with program management, training, coordination, and implementation in day-to-day records management, privacy, Microsoft 365 implementation, or other information governance areas:

- Fractional or Transitional Records Manager
- Fractional or Transitional Privacy Manager
- Fractional or Transitional Microsoft 365 Manager

Positions are flexible and can be staffed full-time, part-time with a specific number of days per week, or for a specific transitional period. Benefits include:

- Experienced information governance and records and information management expertise without the cost or commitment of a full-time role
- Program continuity during turnover of permanent staff
- Effective day-to-day operations of records and information management programs, reducing gaps between policy and practice
- Improved consistency and coordination across business units
- Reduced internal burden by handling records requests and routine operational tasks
- Improved audit readiness and compliance by maintaining SOPs and practical documentation
- Reinforced employee understanding and compliance through ongoing training support and operational guidance
- Flexible alignment with business priorities and risk profile, with the ability to scale up or down as needs change

By embedding a professional with direct access to Contoural's full delivery organization, organizations have the benefit of a single, consistent point of contact backed by deep, on-demand expertise across legal research, retention scheduling, information governance, defensible disposition, privacy, and technology implementation. The fractional or transitional resource can quickly draw on specialized practitioners within Contoural to validate approaches, resolve complex issues, and accelerate problem-solving. This combines the continuity and accountability of a dedicated role with the breadth, institutional knowledge, and lessons learned of a multi-disciplinary team, resulting in higher-quality outcomes, faster execution, and reduced risk at no additional management overhead for the client.

Activities of a fractional or transitional professional include, but are not limited to:

Ongoing Program and Stakeholder Support

Supporting and coordinating the organization's Records and Information Management Liaison network, including acting as a central point of contact for business unit liaisons, reinforcing consistent practices, answering operational questions, and helping ensure that retention and information handling requirements are understood and applied consistently. The fractional resource helps maintain momentum across the organization by tracking follow-ups, coordinating communications, and escalating issues as appropriate.

Assisting with ongoing, day-to-day records and information governance tasks including supporting the rollout of new retention requirements, assisting with system or process changes, helping remediate identified gaps, or providing targeted support for high-priority initiatives. The focus is on practical execution and ensuring that projects move forward, tasks are completed, and deliverables are finalized.

Legal and Discovery Support

Providing assistance and coordination with eDiscovery teams, including assisting with record identification, coordinating searches across repositories, documenting search methodologies, and helping ensure defensible and repeatable processes are followed. While legal strategy and final determinations remain with counsel, the fractional RIM professional supports the operational aspects of information identification and retrieval, helping reduce response time and risk.

Documentation, Training, and Operational Enablement

Updating standard operating procedures (SOPs) and other lightweight documentation to be practical and usable, reflecting how work is actually performed rather than theoretical models. Clear SOPs support consistency, onboarding, audit readiness, and continuity as personnel or priorities change.

Assisting with training delivery and ongoing operational support, including answering day-to-day questions from employees and liaisons. This reinforces proper practices, reduces uncertainty, and improves overall compliance without requiring constant escalation to legal or compliance teams.

Day-to-Day Execution and Follow-Through

Providing hands-on support for day-to-day operational tasks, documentation, and follow-through including tracking action items, maintaining records inventories or logs, coordinating with IT or vendors, and ensuring commitments are completed. The emphasis is on reliability and execution, closing the gap between policy and practice.

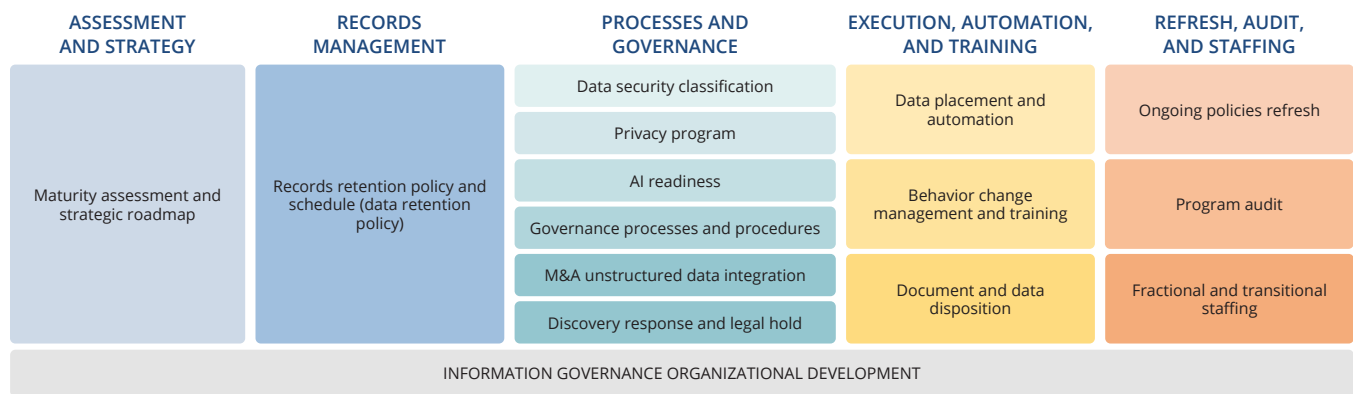
About Contoural

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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