



— WEBINAR SERIES —

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VP Strategic Solutions

Managing Data Privacy While Managing Records



Webinar Series



www.ValoraTech.com



ROT Remediation:
File Share Clean-up
January 21



From Observational to
Operational Governance
July 23



Letting the Robots
Classify: Automating IG
February 18



Unhostaging Your Data:
Reclaiming Control
August 19



AutoClassifying the 3 Rs:
ROT, Records & Retention
March 18



Managing Data Privacy &
While Managing Records
September 23



Structured Data
Management & Disposition
April 15



AI: What Happens When
the Model Collapses
October 21



10 Ways AutoClassification
Can Impact AI
May 13



AI Policy & Governance
with Lewis Eisen
November 18



How AC Transforms
Enterprise Search
June 17



AutoClassification & AI
Trends in Enterprise
December 16

About Valora



- AutoClassification platform for Information Governance
- Automates **discovery**, **identification**, **classification** & **defensible disposition**
- Trusted by IG teams, Records & IM teams, Legal, Compliance, IT teams
- Brings **multiple enterprise repositories** into a single view, and **multiple IG use cases** under one umbrella





Poll Results

Who's here today
& what are your interests?



Who you are & what your challenges are



Who You Are

Records / Information Management

Knowledge Management

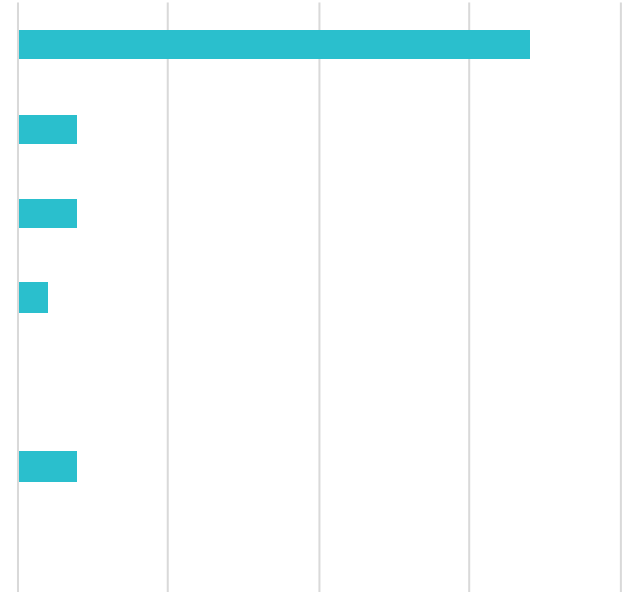
Legal

Compliance

IT

Data Privacy / Security

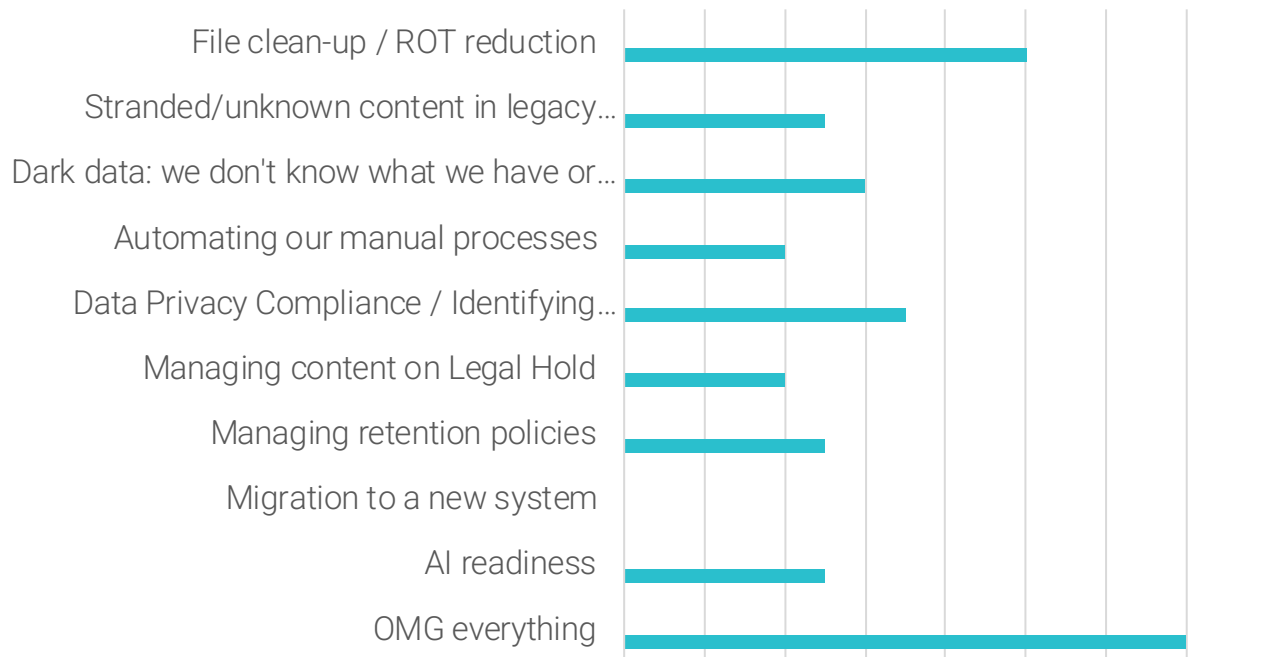
Other



Who you are & what your challenges are



Your RIM & IG Challenges



Housekeeping



Q&A



Recording

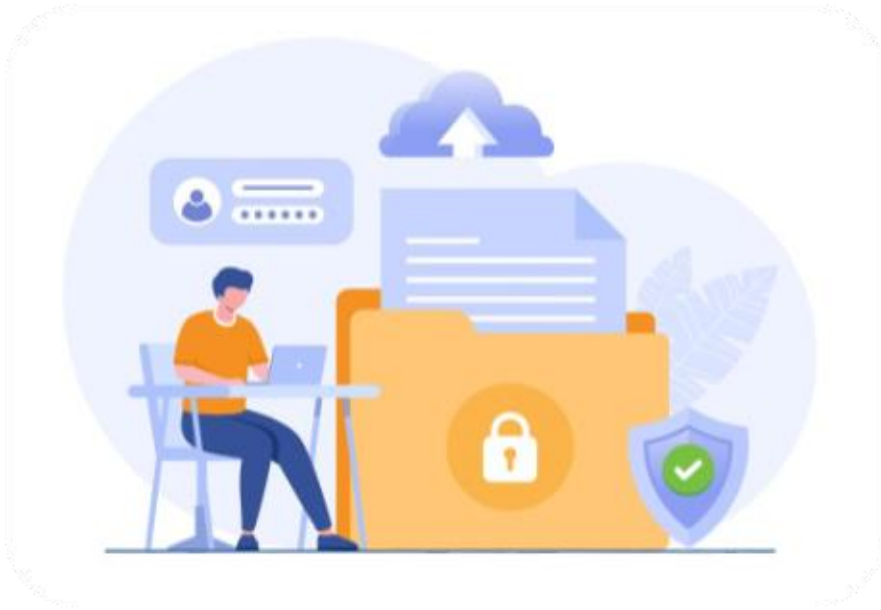


Slides



Feedback

Agenda



- What is Data Privacy & Why should I care?
- How to manage records and data privacy under one initiative
- DSARs: Data Subject Access Requests
- Spoiler Alert: AutoClassification is your friend
- How to advocate for an organization-wide collaborative approach to data privacy
- How to get started

What is Data Privacy?



Data privacy (in general) is the **right to have control** over **how your personal** information is gathered, used, kept, sold and exchanged. The primary thesis is that end-users should have the rights to know, edit, delete or direct how their information exists.



Data privacy (in the context of Information Governance) is the **proper handling of sensitive data** including personal data, financial data, health information and other confidential data to meet regulatory requirements while protecting confidentiality.



Data privacy covers: **personal data protection**, consent & notice, data minimization & purpose limitation, data provenance & lineage, **data subject access rights**, and security measures around sensitive information.

Data Privacy & Data Security are different things

Data Security

Encryption

Threat
Monitoring

Authentication

Access
Control

Breach
Access and
recovery

Data Loss
Prevention

Data Privacy

Legislation

Policies

Best
Practice

3rd party
contacts

Data
Governance

Global
variations

	Data Security	Data Privacy
Focus	protect data from compromise by external attackers or malicious insiders	collection, use & disposal of data from or about individuals
Technical Focus	Firewalls, login/authentication, encryption, breach	Accurate & ethical data collection & management
Emphasizes	File folders & paths	File contents
Driven by	Standards & technology	Regulation & best practice
Primary Practitioners	IT & Cybersecurity	Legal, RIM & Compliance

The 4 D's of Data Privacy



DATA PRIVACY

Does this information contain sensitive personal, health or credit/financial information?



DATA MINIMIZATION

Organizations should limit the data they collect to what is strictly required for a specific, legitimate purpose.



DATA PROVENANCE

What is the history, origin, context, usage and lifecycle of this information?
Is it regulated?



DATA LINEAGE

Where and how does this data flow through our organization? Is it trustworthy?

The 4 D's of Data Privacy



DATA PRIVACY

Does this information contain sensitive personal, health or credit/financial information?



DATA MINIMIZATION

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DATA PROVENANCE

What is the history, origin, context, usage and lifecycle of this information?
Is it regulated?



DATA LINEAGE

Where and how does this data flow through our organization? Is it trustworthy?

What is a “lawful basis” under which you can collect/analyze/use/transform/report/manage data?

- “Lawful basis” means a legitimate reason or legal justification that allows an organization to collect, process, and use personal data, as established by regulations to ensure that privacy rights are respected, and that personal data is handled in a transparent and appropriate manner
- Organizations are *required* to determine their appropriate lawful basis for collecting/having/processing personal data and to document this justification
- Below are GDPR’s defined lawful bases for processing personal data:



Consent



Contractual
Necessity



Legal
Obligation



Vital
Interests



Legitimate
Interests



Public
Task



Special
Categories
of Data

Data Privacy Regulations

There were efforts to pass a comprehensive federal data privacy law, like the American Privacy Rights Act of 2024 (APRA), but they ultimately failed to advance.

2018

2019

2020

2021

2022

2023

2024

2025



GDPR
General Data
Protection Regulation



Federal laws that regulate industry-specific data, but no current federal data privacy law in the US

HIPAA, Health Insurance Portability & Accountability Act: communication of health data

FCRA, Fair Credit Reporting Act: information in your credit report, who can see it

FERPA, Family Educational Rights & Privacy Act: who can request to see student records

GLBA, Gramm-Leach-Bliley Act: how consumer financial products share data

COPPA, Children's Online Privacy Protection Rule: limits data collection for children under 13

Individual states are passing privacy bills in lieu of a federal law

Why is this important now?

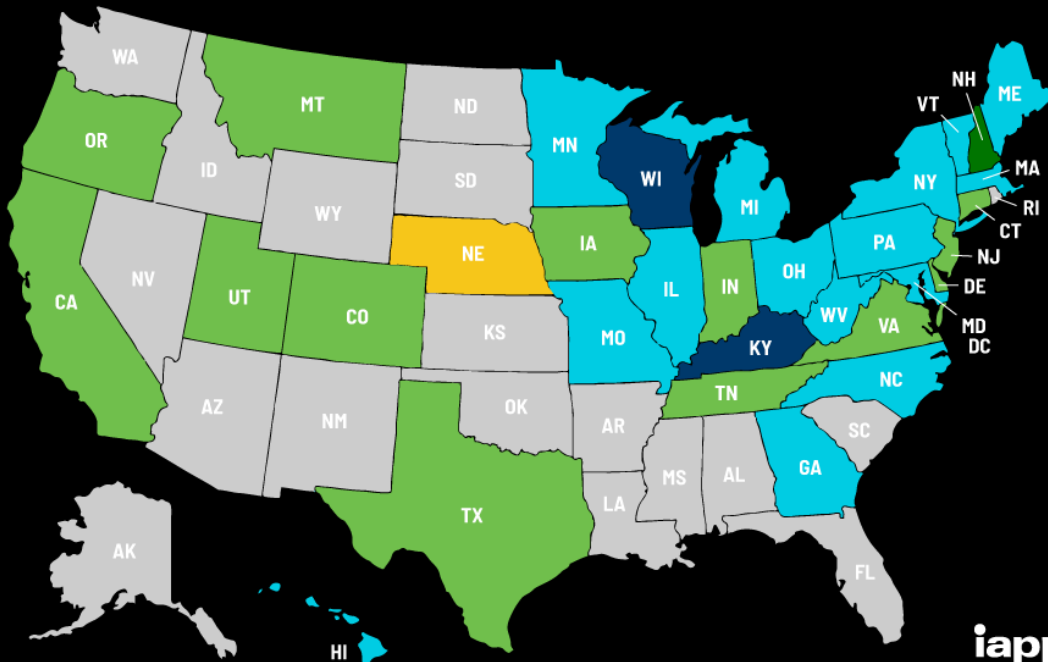
Get to know IAPP

Status of data
privacy regulations
in the US
(Feb 2024)

US State Privacy Legislation Tracker 2024

Statute/bill in legislative process

- Introduced
- In committee
- In cross chamber
- In cross committee
- Passed
- Signed
- Inactive bills
- No comprehensive bills introduced



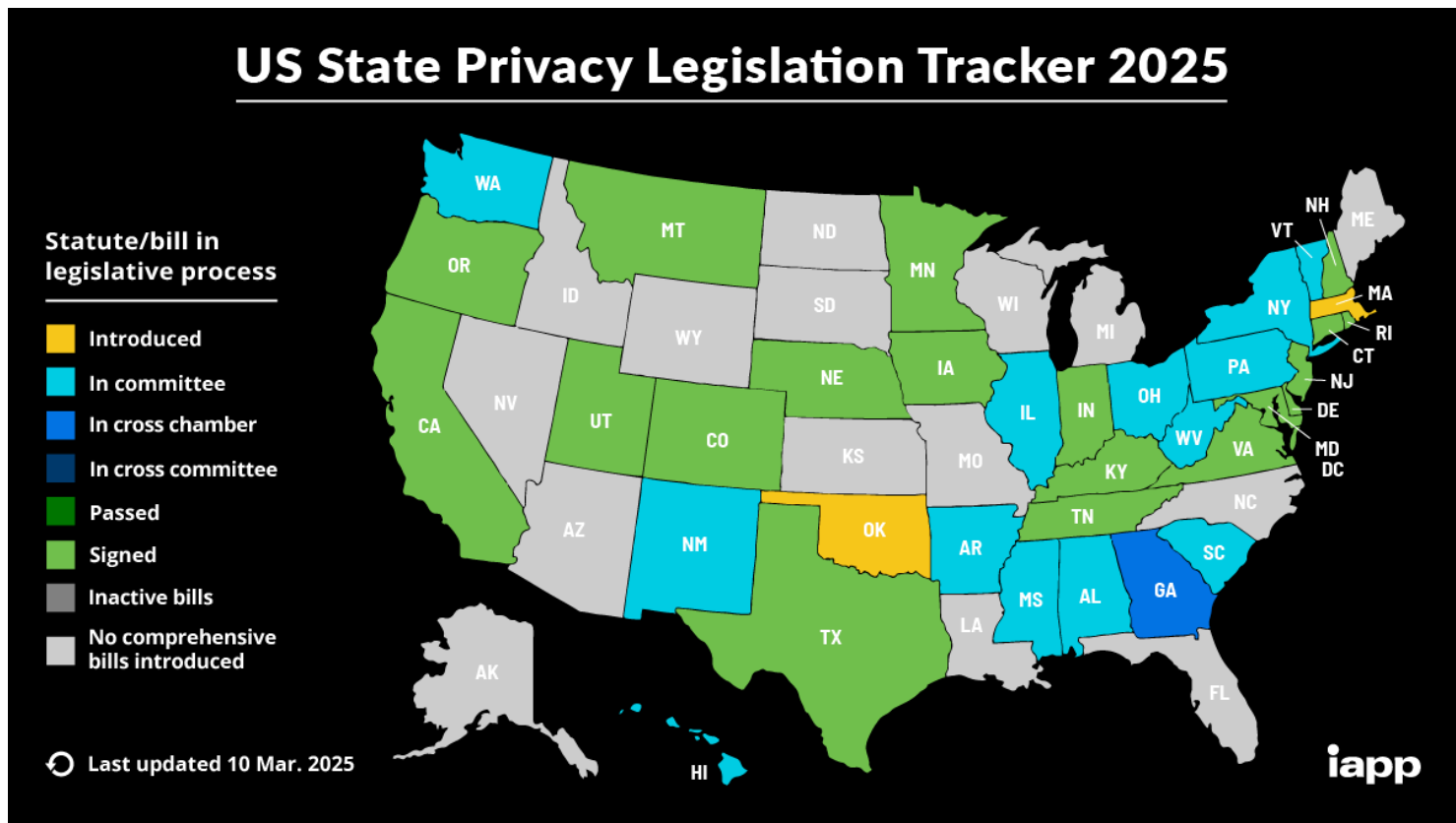
Last updated 23 Feb. 2024

Why is this important now?

Get to know IAPP

Status of data privacy regulations in the US (March 2025)

<https://iapp.org/resources/article/us-state-privacy-legislation-tracker/>



Why is this important now?

Get to know IAPP

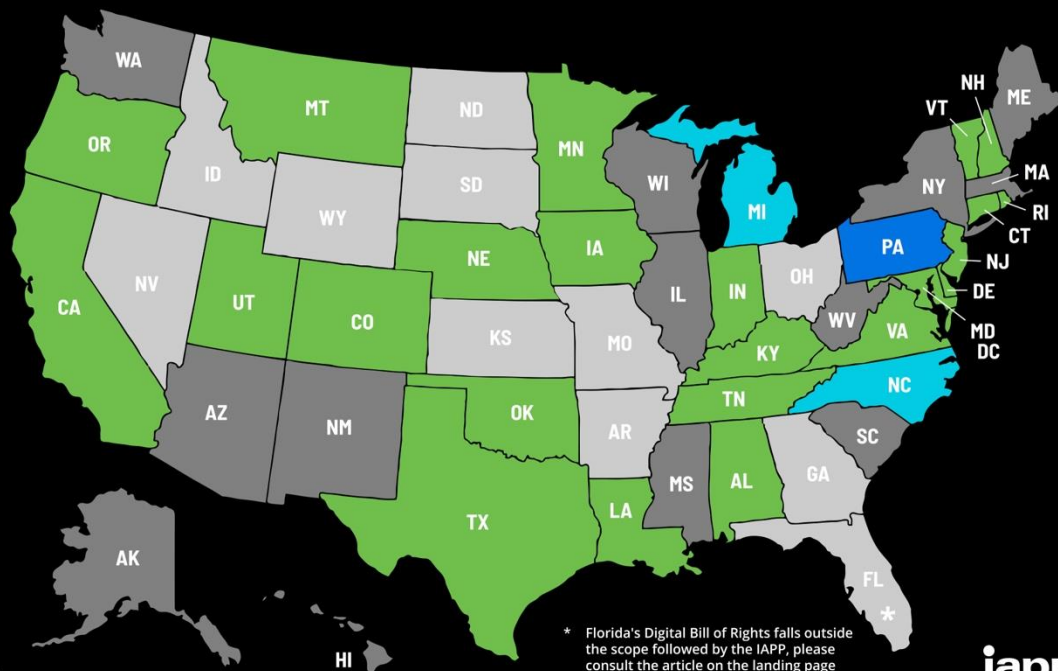
Status of data
privacy regulations
in the US
(Sept 2025)

<https://iapp.org/resources/article/us-state-privacy-legislation-tracker/>

US State Privacy Legislation Tracker 2026

Statute/bill in legislative process

- Introduced
- In committee
- In cross chamber
- In cross committee
- Passed
- Signed
- Inactive bills
- No comprehensive bills introduced



🔄 Last updated 08 Sept. 2026

* Florida's Digital Bill of Rights falls outside the scope followed by the IAPP, please consult the article on the landing page for more information.

iapp

Why is this important now?

- Stop thinking data privacy is “someone else’s problem”
- Just like eDiscovery, this will become a RIM/IG “problem”
- Still time to get on top of it

2026 Tracker is released In Oct 2026

https://iapp.org/media/pdf/resource_center/State_Comp_Privacy_Law_Chart.pdf

US State Privacy Legislation Tracker 2025

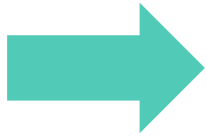


Comprehensive Consumer Privacy Bills

						Consumer rights												Business obligations		
						Right to access	Right to correct	Right to delete	Right to opt out of certain processing	Right to portability	Right to opt out of sales	Right to opt in for sensitive data processing	Right against automated decision-making	Private right of action	Opt-in default (requirement age)	Notice/transparency requirement	Risk assessments	Prohibition on discrimination (exercising rights)	Purpose/processing limitation	
State	Legislative process				Statute/bill	Common name														
LAWS SIGNED (TO DATE)																				
California					CCPA	California Consumer Privacy Act (2018; effective 1 Jan. 2020)	X	X	X	S	X	X		X	L	16	X	X	X	X
Colorado					SB 190	Colorado Privacy Act (2021; effective 1 July 2023)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
Connecticut					SB 6	Connecticut Data Privacy Act (2022; effective 1 July 2023)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
Delaware					HB 154	Delaware Personal Data Privacy Act (2023; effective 1 Jan. 2025)	X	X	X	P	X	X	X	X		17	X	X	X	X
Indiana					SB 5	Indiana Consumer Data Protection Act (2023; effective 1 Jan. 2026)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
Iowa					SF 262	Iowa Consumer Data Protection Act (2023; effective 1 Jan. 2025)	X		X		X	X				S/13	X		X	X
Kentucky					HB 15	Kentucky Consumer Data Protection Act (2024; effective 1 Jan. 2026)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
Maryland					SB 541	Maryland Online Data Privacy Act (2024; effective 1 Oct. 2025)	X	X	X	P	X	X	X	X		13	X	X	X	X
Minnesota					HF 4757	Minnesota Consumer Data Privacy Act (2024; effective 31 July 2025)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
Montana					SB 384	Montana Consumer Data Privacy Act (2023; effective 1 Oct. 2024)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
Nebraska					LB 1074	Nebraska Data Privacy Act (2024; effective 1 Jan. 2025)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
New Hampshire					SB 255	(2024; effective 1 Jan. 2025)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
New Jersey					SB 332	(2024; effective 15 Jan. 2025)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X
					SB 1000	Oregon Consumer Privacy Act (2024; effective 1 Jan. 2025)	X	X	X	P	X	X	X	X-		S/13	X	X	X	X

“Traditional” Records Management; Historically, why were you unable to delete ROT?

- “No tools.” (Delete, delete, delete...)
- “Can’t find it, ROT is mixed in with the good stuff.”
- No one will let us delete things.



No real penalty to “just keep forever” (and violate our RRS, but ok)

Now, there are real consequences
to not deleting data that is supposed to be deleted (past retention), and that we
said we would delete/retain for only X purposes or time period.

We are now out of compliance (not just sloppy).

Meh, so we're out of compliance what's the big deal?

- Meta - \$1.4 billion
with the Texas Attorney General for unlawful collection of biometric data, the largest ever privacy settlement in the U.S.
- California Consumer Privacy Act (CCPA)
= \$2,500 - \$7,500 per individual violation
- Colorado Privacy Act (CPA)
= \$2,000 - \$20,000 per individual violation
= CPA violation is treated as a deceptive trade practice under another Colorado law: the Colorado Consumer Protection Act





Is it Privacy?
Is it RM/IG?

Organization's data ~~privacy~~ responsibilities



DATA PRIVACY

What sensitive data do we have?

Where is sensitive data located?

Who has access to sensitive data?

Are we handling sensitive data correctly?

What sensitive data is
accessible that shouldn't be?

Can I produce the relevant information
when a DSAR request is made?



RECORDS MANAGEMENT

What information do we have?

Where is our data located?

Who has access to what data?

Are we handling our corporate data correctly?

What corporate data is
accessible that shouldn't be?

Can I produce the relevant information
when a request is made?

ROT & Retention Classification Tags



ROT YES/NO

Simple umbrella classification Yes/No
Summary of ROT Detail



ROT DETAIL

- Redundant: Identical Dupe
- Obsolete: File Extension, Past Retention, Temporary, Draft
- Trivial: Auto-Reply, Low Business Value, Non-Record, Code or Executable, Thumbnail, Logo, File Path, File Type, Logo



DUPLICATE TYPE

- Identical (Hash) Duplicate
- 99% (Functional) Duplicate
- 75-98% (Near) Duplicate
- Unique



RECORD CLASS

- Based on Document Type, Source, Custodian/Author, Jurisdiction, Keywords, Personal Data/Sensitivity



RETENTION PERIOD

- Direct inherit from Record Class (Rules)



EXPIRATION DATE

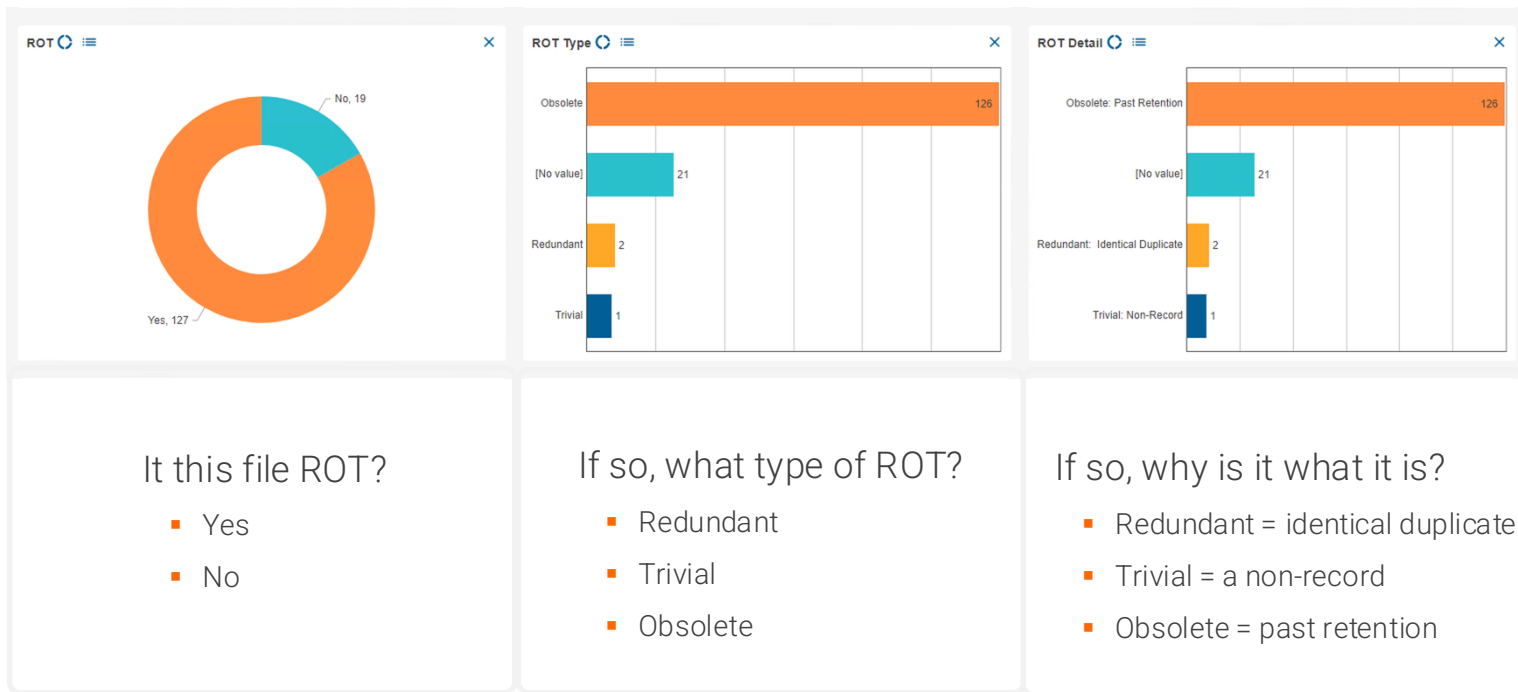
- Calculated from Date Hierarchy (differs by Records Type)
- Creation Date, Hire/Start Date, Termination Date,
- Often triggered by events



EXPIRATION HANDLING

- Automatic Deletion
- Approval Required for Deletion
- Quarantine
- Permanent Record

ROT: know where it is & what it is



Data Privacy Classification Tags



PERSONAL DATA YES/NO

Simple umbrella classification Yes/No
Summary of PD Detail



PERSONAL DATA TYPE

- PII, PHI, PCI
- SSN, DOB, Personal Address or Phone number
- Financial, CC, bank account info
- MRN, medical data, diagnoses, reports



SENSITIVITY

- Highly Confidential, Confidential, Private, Public



DOCUMENT TYPE

- Contract, Correspondence, Graphic, Financial, Transactional, etc.
- Record ID & Record Class
- Attachments and related files
- Source location
- Record holder or custodian



RETENTION PERIOD

- Direct inherit from Record Class (Rules)



EMPLOYEE INFORMATION

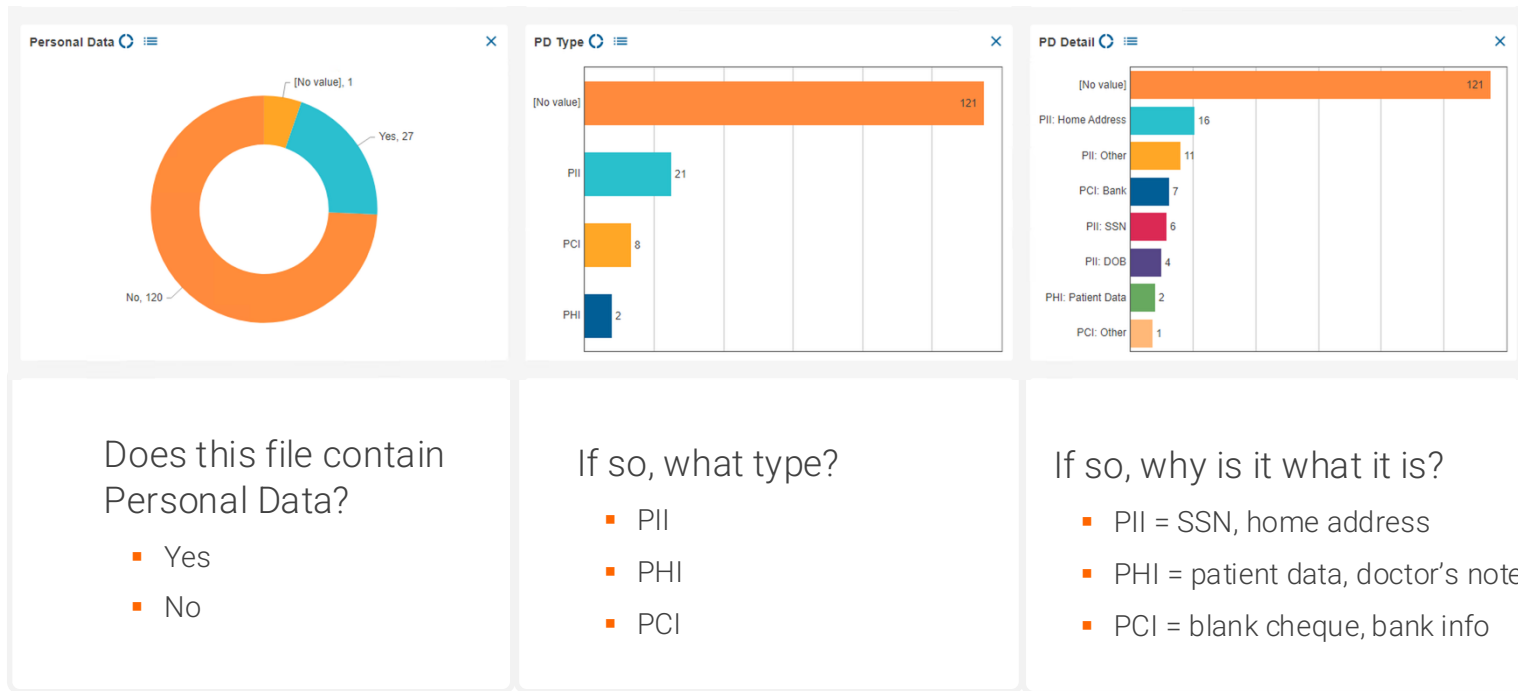
- Employee Name, Employee #
- Hire/Start Date, Termination Date,
- Compensation information



EXPIRATION HANDLING

- Automatic Deletion
- Approval Required for Deletion
- Quarantine
- Permanent Record

Personal data: know where it is & what it is





DSARs: Data Subject Access Requests

DSAR request



Access



Rectification



Removal



Restriction



Portability

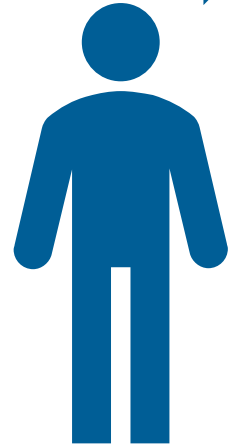


Opt-in



Purpose

DSAR request



Delete
my data

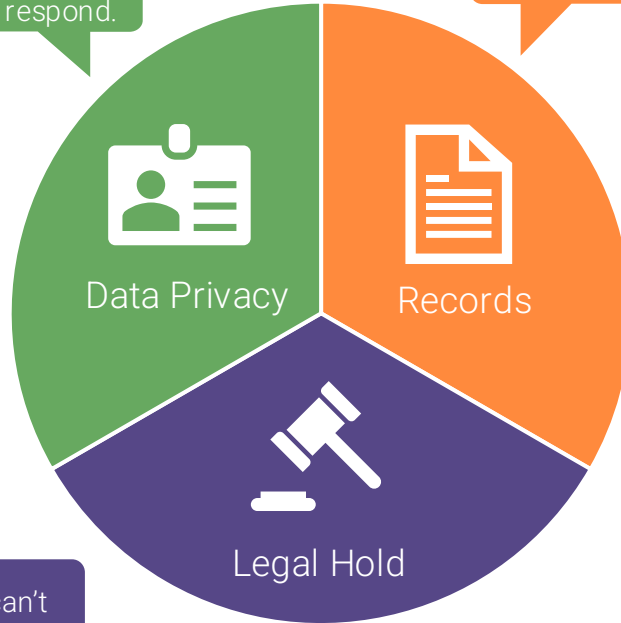
We need to
delete this guy's
data. We have 30
days to respond.

OK, gimme a
sec. I'm going to
search every
system we have

Wait, some of these
are records. We need
to keep those for 7
years.

Wait, some are
customer lists that
have other
customers' data

Wait, we can't
delete this, some
of this stuff is
under legal hold



Privacy and Records must co-exist



How do DSARs effect (interfere with) RIM/IG?

- DSARs can mess up normal retention/disposition timing
- They supersede ROT removal and other time vs. value calculations?



Who wins? a potential boardroom brawl

- Records Retention
- Legal Hold
- DSAR



Resolution Outcomes are different in different jurisdictions

- Notably EU vs. US
- Setting up a lot of "it depends"



So how do you do it?
Enter: AutoClassification

How can tools like AutoClassification help establish, manage and maintain the principles of data privacy?

AutoClassification tools can play a significant role in establishing, managing, and maintaining the principles of data privacy within an organization. These tools use automated processes, machine learning, and predefined rules to categorize and classify data based on its content, context, and relevance.



Identification of
Sensitive Data



Data
Classification



Data Retention
Policies



Access Control
& Permissions



Data Minimization
in Backup &
Archives



Data Discovery &
Mapping



Compliance with
Privacy
Regulations



Data Incident
Response



Policy
Enforcement



Regular Auditing &
Monitoring

AutoClassifying Documents Goes From This..

Name ^	Date modified	Type	Size
 LGPIF Final.pdf	8/13/2016 9:26 AM	Adobe Acrobat Document	171 KB

To This..



Local Government Property Insurance Fund Actuarial Services **Contract**

THIS AGREEMENT effective this **1st day of February 2005** (the "Effective Date") by and between the Office of the Commissioner of Insurance (the "Agency" or "State of Wisconsin") and **AMI Risk Consultants, Inc.** hereinafter referred to as "Contractor"

The purpose of this Agreement for **actuarial services** is to assist the Agency to accurately assess rate and premium levels and establish loss reserves (incurred but not reported, IBNR) for the Local Government Property Insurance Fund (the "Fund") on an annual basis to ensure the financial stability of the Fund.

I. Term. The term of this Agreement shall be for one (1) year, from the 1st day of February 2005, and expiring on the 31st day of January 2006. The contract may be renewed for two (2) successive one-year periods upon mutual written agreement of the parties. Contractor will notify the Agency six months prior to the annual expiration if it wishes to renew this Agreement and shall specify any amendments the Contractor wishes to propose.

II. Contact Persons. For purposes of administering this Agreement, the following representatives of each party are hereby designated as appropriate contact persons:

(a) For the Agency:

Danford Bubolz, Insurance Program Officer
Local Government Property Insurance Fund
125 South Webster Street, Madison, Wisconsin 53702

(b) For the Contractor:

Aguedo M. Ingco, President
AMI Risk Consultants, Inc.
11410 North Kendall Drive, Suite 208
Miami, Florida 33176-1031

III. Actuarial Services Required

A. Assist the Fund in annually establishing rates and adequate incurred but not reported claims reserves for the Fund.

DocType = Contract

Effective Date = 2/1/2005

Party Two = AMI Risk
Consultants, Inc.

Term = 1 year

Renewals = two 1 year terms

Keywords = Actuarial Services

Elsewhere: exhibits,
amendments, signatories,
jurisdiction, cover page, etc.



RecordType = Contract

RecordClass = AP/AR Contract

Retention = Expiration + 5Y

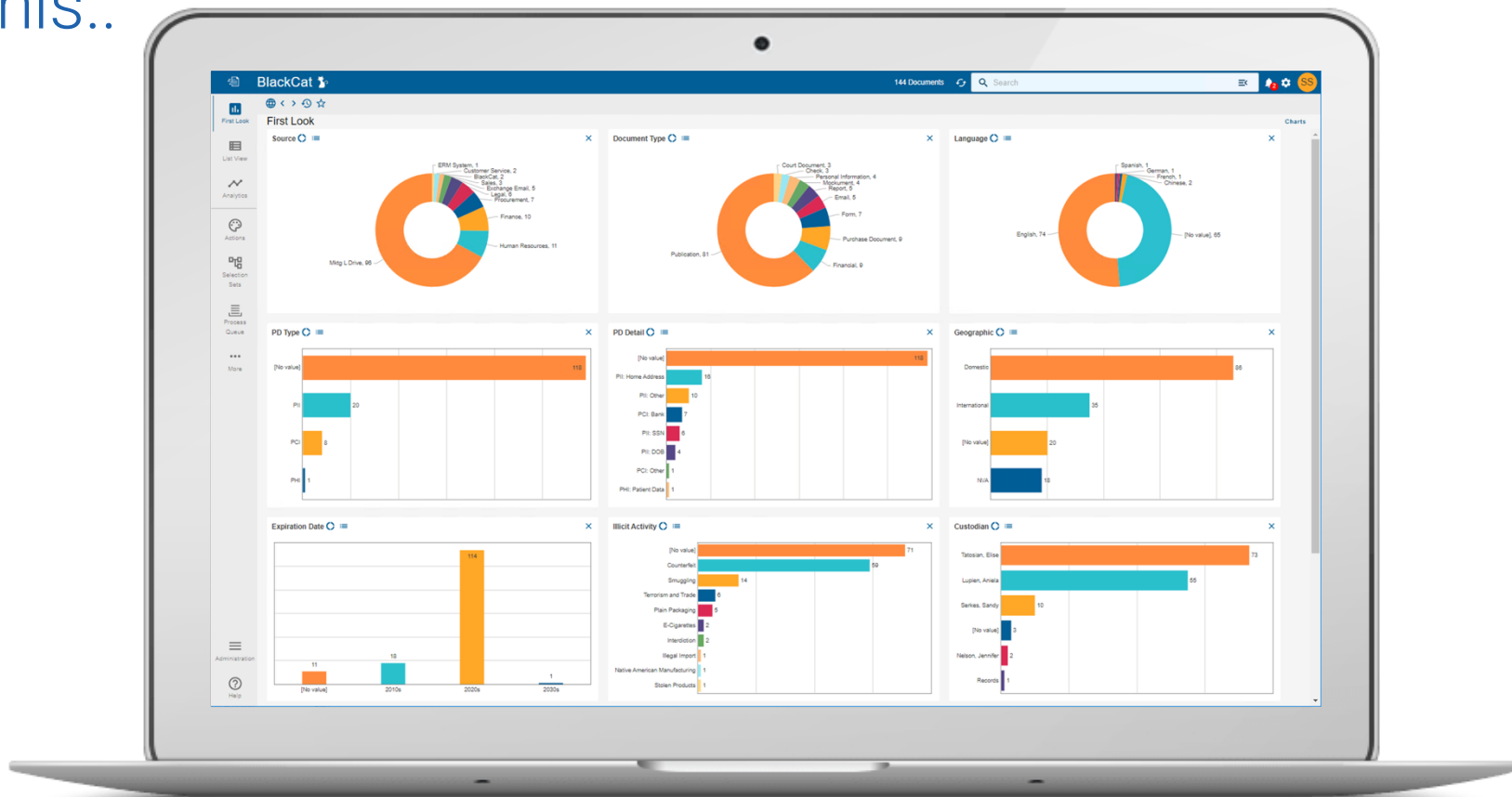
Handling = Delete after
authorization

Sensitivity = Confidential
(protection/redaction based on
user access class)



Retain or Delete?

To This..



Auto Classifying a Contract (PII)

Uniform Residential Loan Application

This application is designed to be completed by the Applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower" as applicable. Co-borrower information must also be provided (and the appropriate box checked) when ☒ the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or ☐ the income or assets of the Borrower's Spouse will not be used as a basis for loan qualification, but his or her liabilities must be considered because the Borrower resides in a community property state, or the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan.

If this is an application for joint credit, Borrower and Co-Borrower each agree that we intend to apply for joint credit (sign below):

Borrower		Co-Borrower		Interest Only	
I. TYPE OF MORTGAGE AND TERMS OF LOAN					
Mortgage Applied for:	☒ V.A. FHA	☐ Conventional	☐ Other (explain):	Agency Case Number	Lender Case Number
Amount	\$ 625,000.00	Interest Rate	6.5%	No. of Months	360
Amortization Type:	☒ Fixed Rate	☐ Other (explain):	ARM (type):		
II. PROPERTY INFORMATION AND PURPOSE OF LOAN					
Subject Property Address (street, city, state, ZIP)					No. of Units
5421 Talahassee Place, Perry FL 32347					1
Legal Description of Subject Property (attach description, if necessary)					Year Built
					1984
Purpose of Loan	☐ Purchase	☒ Construction	☐ Other (explain):	Property will be:	
	☐ Refinance	☐ Construction-permanent		☒ Primary Residence	☐ Secondary Residence
Complete this line if construction or construction-permanent loan					
Year Lot Acquired	Original Cost	Amount Existing Liens	(a) Present Value of Lot	(b) Cost of improvements	Total (a + b)
Complete this line if this is a refinance loan					
Year Acquired	Original Cost	Amount Existing Liens	Purpose of Refinance	Describe Improvements made	to be made
1996	\$ 375,000	\$ 402,500	Cash-Out/Home Improvement	Add-on two-car garage	
Title will be held in what Name(s)			Manner in which Title will be held	Estate will be held in:	
Brady and Wilma Schleshenger			Tenants in common	☒ Fee Simple	
Source of Down Payment, Statement Changes and/or Subordinate Financing (explain)			☐ Leasehold (show expiration date)		
III. BORROWER INFORMATION					
Borrower's Name (include Jr. or Sr. if applicable)			Co-Borrower's Name (include Jr. or Sr. if applicable)		
Brady G. Schleshenger			Wilma B. Schleshenger		
Social Security Number	Home Phone (not area code)	DOB (MM/DD/YYYY)	Yrs. School	Social Security Number	Home Phone (not area code)
562-55-5595	(950) 986-9985	04/11/1969	2	548-32-9855	(950) 986-9985
☒ Married	☐ Unmarried (include single, divorced, widowed)	Dependents (not listed by Co-Borrower)	☒ Married	☐ Unmarried (include single, divorced, widowed)	Dependents (not listed by Co-Borrower)
☐ Separated		no. 1 ages 17	☐ Separated		so.

Clear PII: SSN

Likely PII: ("warning sign")

Clear PII: Home Phone Number

Not PII: Interest Rate

► Implied classification: Active PII, needs protection & redaction

Name	Date modified	Type	Size
 Scott.jpg	8/13/2016 9:26 AM	Adobe Acrobat Document	171 KB

Auto Classifying a Passport (PII)

Filename: Scott.jpg

Filename & metadata
tells us nothing



Need to analyze content

OCR image to text

PASSEPORT
PASSEPORT

CANADA

Type/Type Issuing Country/Pays émetteur
P CAN

Surname/Nom
EVANS

Given names/Prénoms
SCOTT MICHAEL HUGH

Nationality/Nationalité
CANADIAN/CANADIENNE

Date of birth/Data de naissance
30 AUG /AOÛT 06

Sex/Sexe Place of birth/Lieu de naissance
M OTTAWA CAN

Date of issue/Data de délivrance
09 MAR /MARS 17

Date of expiry/Data d'expiration
09 MAR /MARS 22

Issuing Authority/Autorité de délivrance
OTTAWA

Passeport No./N° de passeport
HN369099

ENG 10 158

P<CANEVANS<<SCOTT<MICHAEL<HUGH<<<<<<<<<<<<<
HN369099<OCANO0608303M220309D<<<<<<<<<<<<<O8

P<CANEVANS<<SCOTT<MICHAEL<HUGH<<<<<<<<<<<<<
HN369099<OCAN0608303M2203090<<<<<<<<<<<<<<<<08

Expiry Date

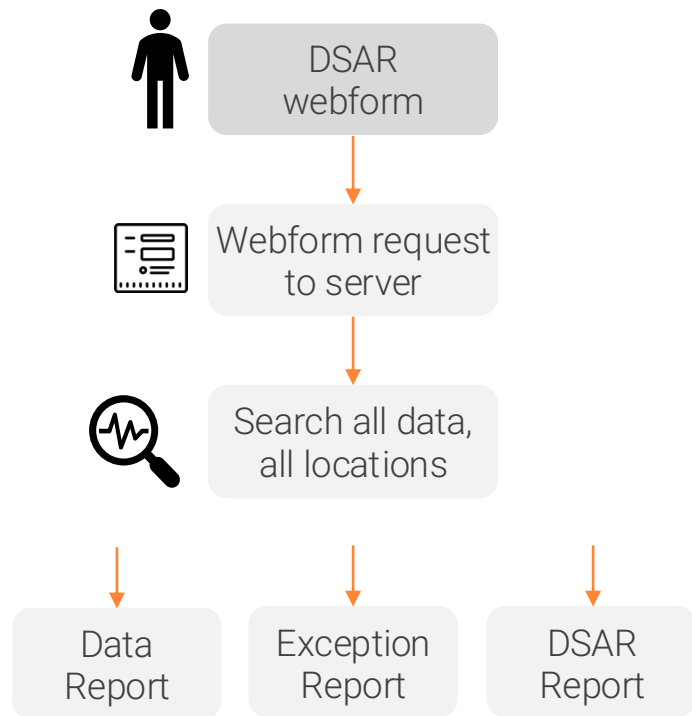
- Implied classification: Active PII, needs protection & redaction

Auto Classifying a Passport (PII redaction)

PASSEPORT CANADA
Type/Type Issuing Country/Pays émetteur
P CAN
Passport No./No de passeport
[REDACTED]
Surname/Nom
EVANS
Given names/Prénoms
SCOTT MICHAEL HUGH
Nationality/Nationalité
CANADIAN/CANADIENNE
Date of birth/Date de naissance
[REDACTED]
Sex/Sexe Place of birth/Lieu de naissance
M OTTAWA CAN
Date of issue/Date de délivrance
09 MAR /MARS 17
Date of expiry/Date d'expiration
09 MARS /MARS 22
Issuing Authority/Autorité de délivrance
OTTAWA

P<CANEVANS<<SCOTT<MICHAEL<HUGH<<<<<<<<<<<<<
[REDACTED]<0CAN0608303M2203090<<<<<<<<<<<<<<08

DSAR Request Workflow



STARK INDUSTRIESLogin

[Residential](#) [Business](#) [Pay Bill](#) [See Schedule](#) [Support](#) [About](#)

Data Request Form

First Name: _____ Email: _____
Last Name: _____ Phone: _____
Account #: _____
Service Address: _____

Select all that apply:

- ☐ Request for disclosure (tell me about my data)
- ☐ Request for access (give me my data)
- ☐ Request for deletion (delete my data)

Preferred way for feedback on the request:

- ☐ Email
- ☐ In writing at Service Address

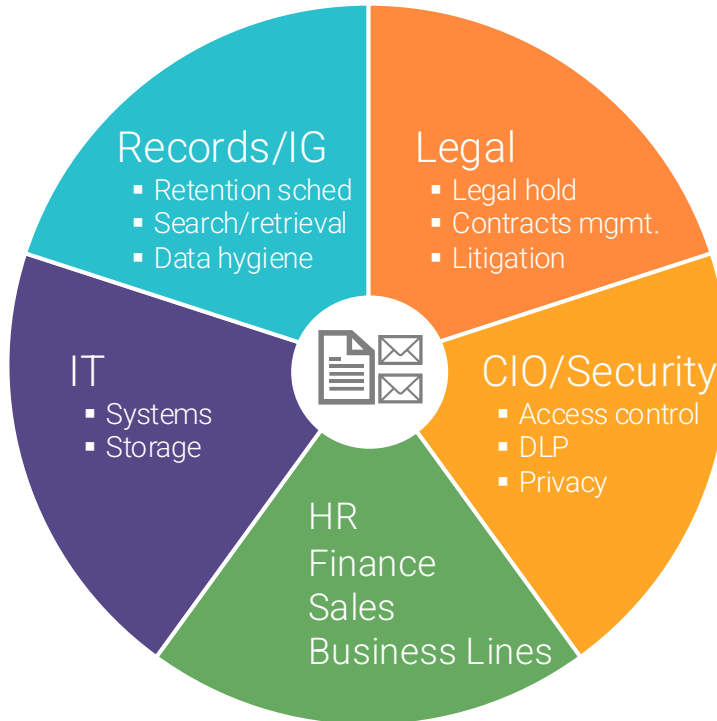
SUBMIT



Where & How to Start:

How to get
your org on board

Who will you need to get on board?

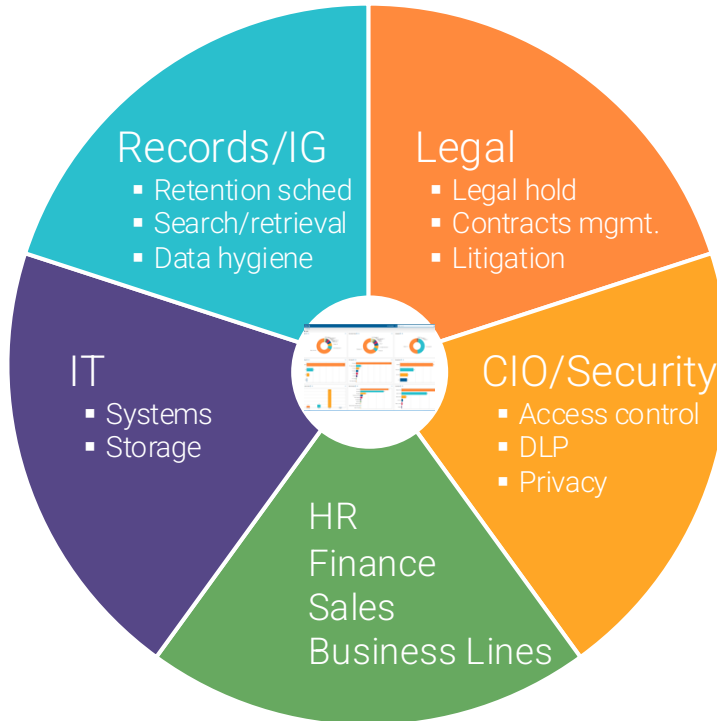


Every piece of content created has different value to each group

- ✓ Who owns the content?
- ✓ Whose goal is most important?
- ✓ What poses the greatest risk?
- ✓ Who owns the budget?

Common Goal:
each group needs to be compliant
with their mandate

Shared content, Shared goals



Content management and data privacy within your organization is everyone's issue

- ✓ Organization and control are for the greater good
- ✓ Should be a shared resource
- ✓ Shared responsibility, shared cost

Common Goal:
centralized management with
distributed benefits

How to stand up a data privacy program in 10 “easy” steps



What you'll need:

1. An understanding of the [regulations and legal basis](#) for your requirements
2. [Policies](#) documenting how you will operate and comply
3. [Executive support](#) to implement, maintain and enhance these programs
4. [Appropriate tools](#) to execute and ensure compliance
5. [Ongoing](#) diligence and management



What you'll get:

1. Data inventory (aka discovery, mapping)
2. Establish tagging/retention criteria
3. Baseline tagging & disposition
4. Remove low hanging fruit (ROT, dupes, past retention, etc.)
5. Implement automated retention that is data privacy-aware (ensures data minimization)

Recommendations: How & where to start

Solid Use Case

Start with a compelling use case

- Quick and easy that will prove ROI quickly
- Highest risk?
- Prove ROI



Look Forward

Always have an eye on future use cases

- What do you need for this application or use case?
- What will you need for future use cases?



Measure Results

Benchmark results and accuracy of pilot

- Accuracy of results?
- Increase guidance or seek SME?
- What reporting was useful? What else is needed?



Build on Success

Build business case on pilot alone then expand

- Prove ROI functioning system
- Where to next?
- Additional use cases running on same platform



Spread the Word

Sharing is caring, expand internally

- Host internal showcases for mgmt & other departments
- Design pilots that highlight important content, results or exposure points



Cool. How long is that going to take?



Complexity

Of your data environment: cloud, on-prem, structured, unstructured data environments



Goals & Requirements

Input from stakeholders for enterprise-wide approach to data governance.



Amount of Data

Smaller organizations with less data will be faster to process than large enterprise.

Weeks

Months

Phased Implementation



Planning

Prioritize data environments,
align stakeholders, set KPIs



Baseline testing

Limited data set to
benchmark and forecast
scope/scale



Implementation

Implement scale to process
all enterprise content



Delta Monitoring

Continuously look for and
process new & edited
content

Weeks

Months



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Q&A

Thank you



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