

RETENTION & LIFECYCLE GOVERNANCE

Records retention schedule software for global compliance

Organizations are managing more information, across more systems, under more scrutiny than ever. The larger challenge is no longer maintaining a retention schedule. It is **operationalizing governance at enterprise scale.**

340+

jurisdictions in the research database

360,000+

retention obligations, kept current

8 weeks

from first workshop to a live schedule

The reality today

For many organizations, retention governance still runs on static documents and manual processes, whether the schedule lives in a spreadsheet, a PDF on the intranet or a legacy platform the business has to work around. Regulations change faster than schedules can be updated, and legal teams spend significant time on manual research and audit response.

 **Governance inconsistency**
Across regions and business units

 **Fragmented policy execution**
Disconnected systems that were never designed to agree

 **Uncontrolled data growth**
And increasing AI exposure

 **Defensibility risk**
Proof assembled by hand for every audit

What Orchestrate changes

The tool organizations use to build, maintain, and operationalize their global records retention schedules: an operational framework that stays aligned with evolving requirements, not a document.

- ✓ A centralized, reliable retention schedule
- ✓ Enterprise consistency across jurisdictions and business units
- ✓ Operationalized policy execution across governance workflows
- ✓ Defensibility strengthened with embedded legal intelligence

What this looks like day to day

Legal citations map directly to record categories, so audit response is faster and more defensible.



Apply retention consistently

Across functions and jurisdictions, from one taxonomy



Reduce manual legal research

Through built-in legal intelligence and citation mapping



Give employees clearer guidance

Actionable, in the language of the records they hold



Support lifecycle governance

A foundation for broader information governance initiatives

Why Orchestrate is different

-  **Built for operational governance**
Consistent execution across jurisdictions, units and workflows.
-  **Designed for enterprise complexity**
Global governance without duplicating schedules across regions.
-  **Legal intelligence embedded**
Updated research and citation mapping improve defensibility.
-  **Practitioner-first design**
Built around how legal, compliance and records teams work.

From static schedule to living system in eight weeks

A structured, guided implementation. Each phase closes on a stated outcome, so progress is visible rather than asserted.

WEEK 1

Foundation

Align scope, priorities and roles; define taxonomy and “big bucket” structure; consolidate existing schedules into a baseline.

Outcome: the foundation for your retention program.

WEEKS 2–3

Legal research

Validate applicable requirements across jurisdictions, map obligations to record categories, establish supporting citations.

Outcome: verified legal requirements aligned with your records.

WEEKS 4–5

Baseline & exceptions

Define standard retention across categories, then identify and configure jurisdiction-specific variation deliberately.

Outcome: a defensible baseline, local requirements included.

WEEKS 6–7

Review & iteration

Stakeholder review against real use cases; refine mappings on the feedback and finalize the schedule.

Outcome: a reviewed schedule, approved and ready for use.

WEEK 8

Go live & enablement

Launch employee access and search, run training, confirm readiness for operational use.

Outcome: a live, accessible retention system.

ONGOING

Support & evolution

Continuous legal updates, plus advisory for privacy, AI governance and IG strategy.

Outcome: a program that stays current over time.

The outcome for practitioners

Organizations gain greater confidence in their retention and lifecycle governance programs while reducing the operational burden of manual research and fragmented processes.

- ✓ Improved defensibility & audit readiness
- ✓ Faster policy research & audit response
- ✓ More consistent policy execution
- ✓ Clearer guidance for employees
- ✓ Governance that scales with growth

Extending beyond policy

Orchestrate is not about creating a better schedule document. It is about replacing a fragile, manual process with **a governance system organizations can trust**. One that stays current, scales with the enterprise, improves defensibility, and supports operational policy execution instead of slowing the business down.

For organizations looking beyond policy management alone, Orchestrate can also serve as the foundation for broader information and lifecycle governance. It defines the governance rules that are then applied across the data environment, connecting policy to execution when paired with **Illuminate**.



Explore what Orchestrate could look like for you.

If this is the foundation your organization is looking for, we would welcome the conversation.

[Book a walkthrough](#)

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About LexShift. LexShift helps organizations operationalize governance across legal, regulatory, privacy, and information management domains. Combining practitioner expertise with modern governance technology, LexShift enables organizations to move from static policy frameworks to defensible, scalable execution. Founded in 2022 and headquartered in Chicago.